

Onboarding Runbook — signed to live in 48 hours

This is the repeatable process for taking any client — estate, building portfolio, institution or short-let host — from a signed agreement to residents using the platform. It is written so that a second person can run it without asking anyone.

OWNER OF THIS PROCESS

Akin (project lead) runs every onboarding. Jide (CTO) is escalation only. Nobody else provisions an estate — one hand on the mint keeps the codes safe.

BEFORE THE CLOCK STARTS — WHAT THE CLIENT MUST GIVE YOU

- ☐ Signed agreement and the pricing tier (Essential / Secure / Total Living, or the commercial band).
- ☐ The unit register as a CSV: columns property,unit,plan — one row per unit, no blanks, no duplicates.
- ☐ Names and phone numbers for four staff roles: manager, gate, works, finance.
- ☐ A go-live date the client will announce to residents themselves.
- ☐ For commercial: building list with criticality (standard / complex / critical). For campus: hostel + faculty list. For stays: unit list and iCal links.

HOURL 0-2 — PROVISION

1 Check the register

Open app.ilumang.com/admin, sign in with your admin phone. Paste or upload the CSV and press 'Check the register'. It reports unit count, property count and any duplicates. Fix the CSV, never the platform.

2 Provision

Enter the client's name (the id auto-fills), press 'Provision this estate — LIVE'. Seconds later the estate exists and every claim code is minted.

3 Take the outputs

Press 'Print door cards' and print on A4 — eight cards per page, cut along the borders. Download `claim_codes.csv` and store it where cash would be stored. Do not email it, do not put it in the repo, do not WhatsApp it.

4 Issue the staff codes

The four staff codes appear on screen once. Give each to ONE named person by phone call, never in a group chat.

HOURL 2-8 — THE ESTATE OFFICE

1 Claim the staff accounts

Sit with the manager, gate officer, works lead and bursary contact. Each claims their code at `/claim` on their own phone. Fifteen minutes total.

2 Walk the manager through `/manage`

One pass through: publish a test notice, look at the works desk, look at the treasury. Leave them the Field Kit.

3 Raise the current period's charge

With the bursary contact, raise the real service charge in `/treasury` so residents see a live ledger on day one, not an empty one.

4 Book the drills

Panic drills are scheduled now, before residents hear about the button. Three drills, logged times, signed off by the manager.

HOURL 8-48 — THE RESIDENTS

- 1 Distribute door cards**
Under doors, or handed over at the gate against the unit list. Do not post codes in a group chat — one code, one home.
- 2 The manager publishes the welcome notice**
Written by them, not by us. It should say what ILUMA is, what to do with the card, and that the estate office is still there.
- 3 Hold a claiming clinic**
Two hours at the estate gate or clubhouse. Sit with the elderly and anyone struggling; claim on their behalf with their phone in their hand.
- 4 Watch the first tickets**
The first three faults reported set the estate's opinion of the platform forever. Make sure they are assigned within the hour and resolved visibly.

GO-LIVE CHECKLIST — ALL MUST BE TICKED

- ☐ Estate provisioned; unit count matches the client's register exactly.
- ☐ Door cards printed and distributed; claim_codes.csv in safe custody.
- ☐ Four staff accounts claimed and tested on their own phones.
- ☐ Manager has published at least one real notice and received it by SMS.
- ☐ Current period's charge raised; at least one test payment completed and visible on the ledger.
- ☐ Three panic drills passed and logged; responder rota written down and on the wall.
- ☐ Medical dispatch explained to the gate team (open the gate, guide the ambulance).
- ☐ Field Kit left at the estate office; support contact given to the manager.
- ☐ Client's go-live announcement sent by the client.
- ☐ Day-7 review booked in the calendar.

WEEK-ONE SUPPORT RHYTHM

When	What	Who
Day 1 evening	Call the manager: any confusion?	Akin
Day 3	Check claim rate; offer a second clinic	Akin
Day 7	Review: tickets opened / resolved, claim %	Akin + manager
Day 30	First month report to the client	Akin
Anytime	Anything technical or a rules question	Jide

ONBOARDING MANY CLIENTS — THE WAVE METHOD

Do not onboard estates one at a time forever. From the third client onwards, run waves: provision a batch on the same morning, print all door cards together, and schedule the claiming clinics across the week. One person can hold roughly ten estates in a wave; beyond that, a second trained onboarder is cheaper than a rescue.

- Wave size 5-10 clients. Same provisioning morning, staggered clinics.
- Never distribute door cards before staff accounts are claimed and drills are done.
- Track every wave on one sheet: client, units, provisioned date, claim %, first-ticket time, go-live date.
- A client is only 'live' when a resident has claimed, a fault has been resolved and a payment has landed. Anything less is 'provisioned'.

THE STANDARD THAT PROTECTS THE BRAND

Never let a client go live without drilled panic response and a manager who has published a notice with their own hands. A quiet, competent launch in one estate sells the next ten; one estate where the alert button went unanswered would cost more than all of them.

ESCALATION

- Resident cannot claim / no SMS → Akin checks the code and the number, then Jide checks the delivery log.
- Payment not showing on a ledger → Jide checks the payment webhook log; never fix a ledger by hand.
- Anything touching health records → nobody reads them, ever, including us. There is no support action that requires opening a resident's health thread.
- Suspected misuse of a staff account → Jide revokes the membership immediately, then investigate.