CHARTER LOTTERY · IT AND MSP

MSP Onboarding Walkthrough

How an IT provider takes a charter school network from nothing to a live application portal in Charter Lottery. Every picture is a full 1440 × 900 laptop window from the current application, using a made-up network, Riverbend Charter Schools, and a made-up technician, Sam Torres.

1. Create the organization
2. Secure the account
3. Add the schools
4. Invite the staff
5. Set organization defaults
6. Configure each school
7. Publish the parent portal
8. Open the first cycle
9. Confirm it works
Allowlist and go-live checklist

Decide first

Question	Answer
How many organizations?	One network is one organization, with each campus as a school inside it. Separately governed networks are separate organizations.
Which login does the MSP use?	One email address belongs to one organization. A technician serving two clients needs a different address for each. There is no multi-client MSP console.
Who holds Organization Admin?	Name at least two people, ideally one at the MSP and one at the school. Offboarding an organization admin goes through Charter Lottery support.
Google or password?	Google Workspace schools can use Continue with Google. Microsoft 365 schools use email and password with an authenticator app: there is no Microsoft Entra, SAML or SCIM connection today.
Which campuses are billed?	$999 per school per year. Setup, portals and collecting applications are free; a subscription is needed when a school runs its lottery.

Gather first

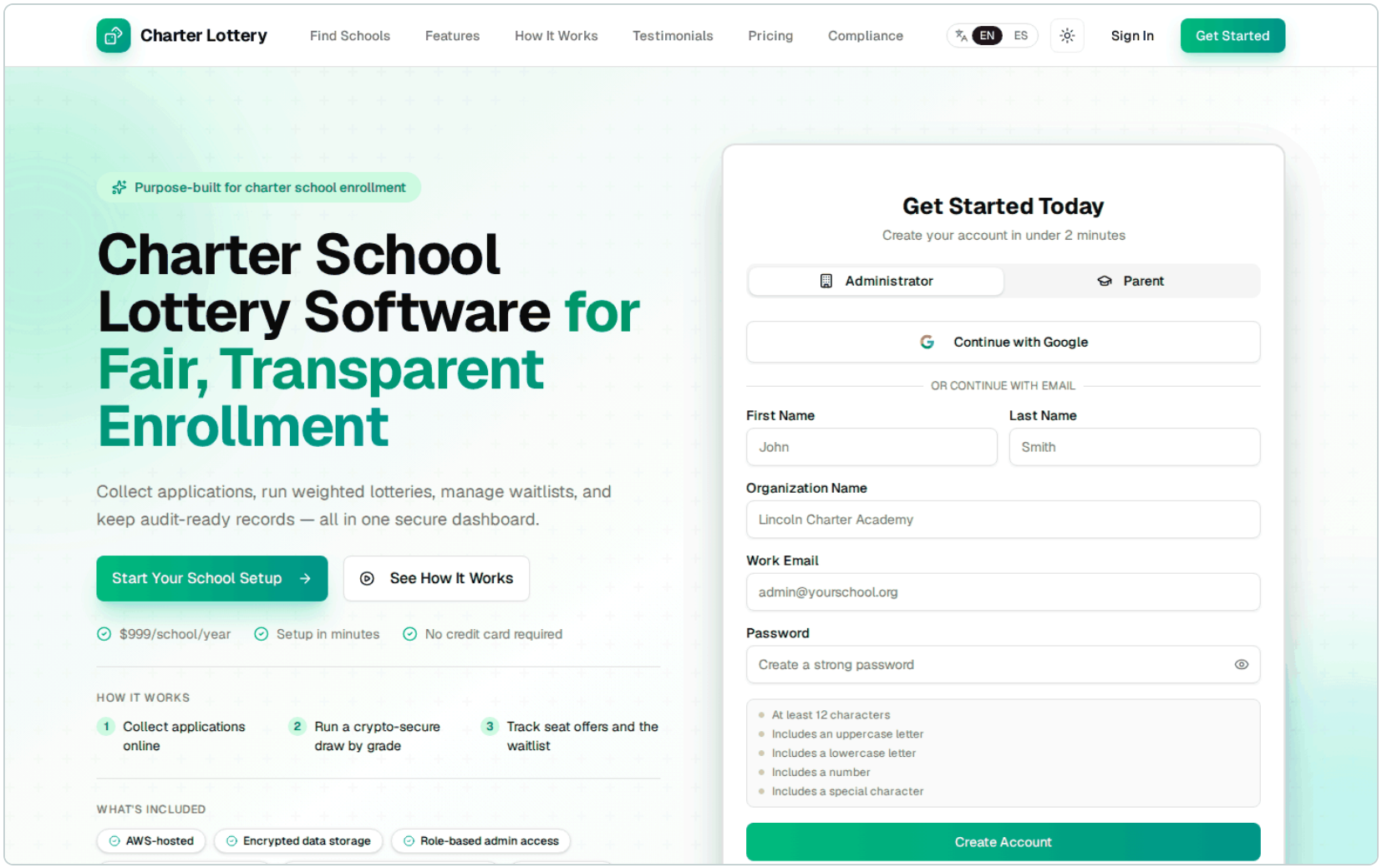
- Network name, as families should see it
- Each campus: name, public phone and email, street address, time zone
- Staff list: name, work email, role, and which campuses each person runs
- Grades, seats, dates and priority rules for the first lottery cycle
- Who can edit each school's website, for the portal link
- Access to the mail filter, to allowlist the senders listed at the end of this guide

PART 1

Create the organization

Step 1. Start from the home page

Go to **charterlottery.com** and use **Get Started**, or the sign-up card on the page. The same form is at `/sign-up`.

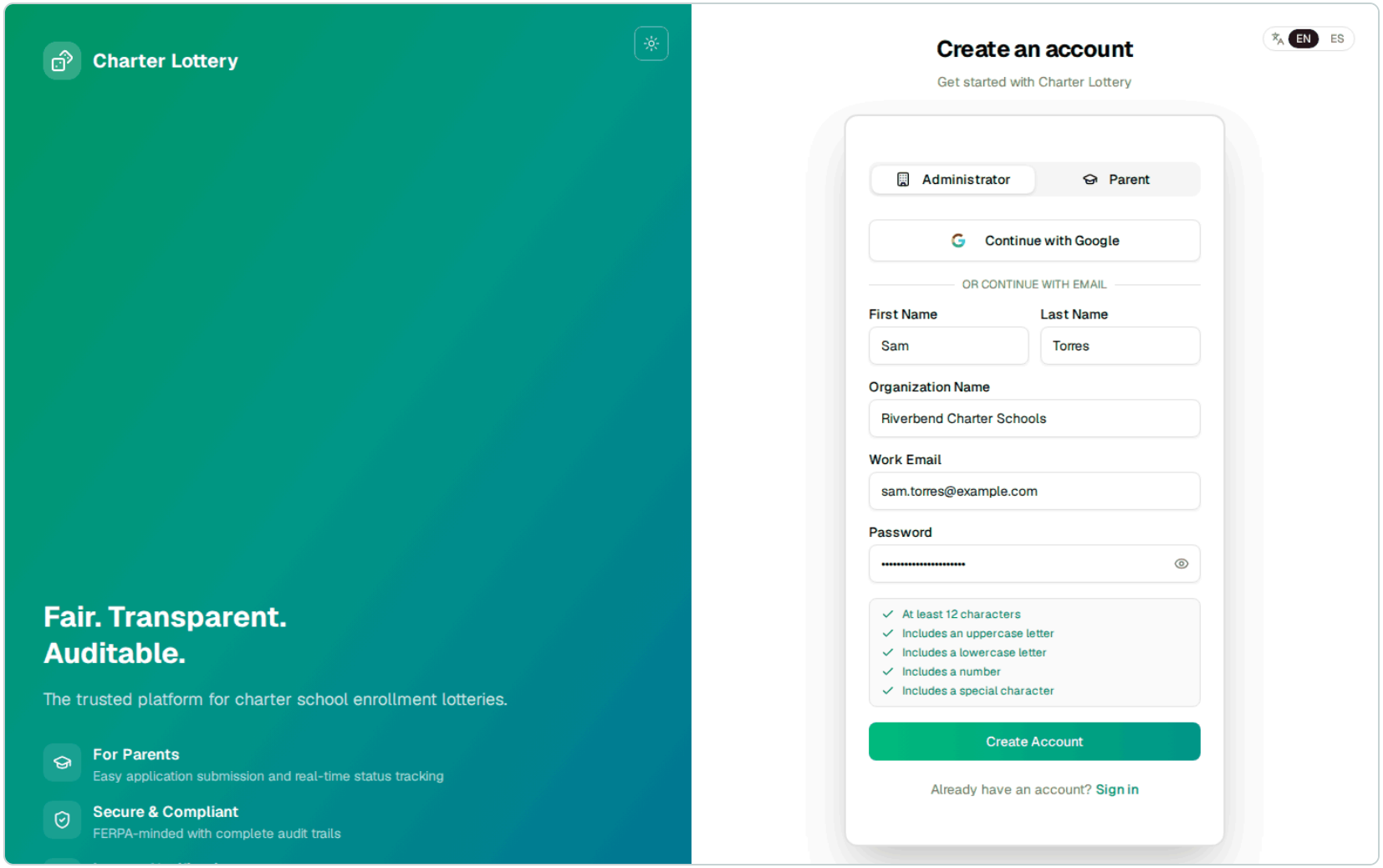


The public home page with the sign-up card.

Step 2. Create the administrator account

Stay on the **Administrator** tab. Enter your name, the network as **Organization Name**, your work email and a password of at least 12 characters with upper and lower case, a number and a symbol. The checklist confirms each rule as you type.

This creates the organization and makes you its first Organization Admin.

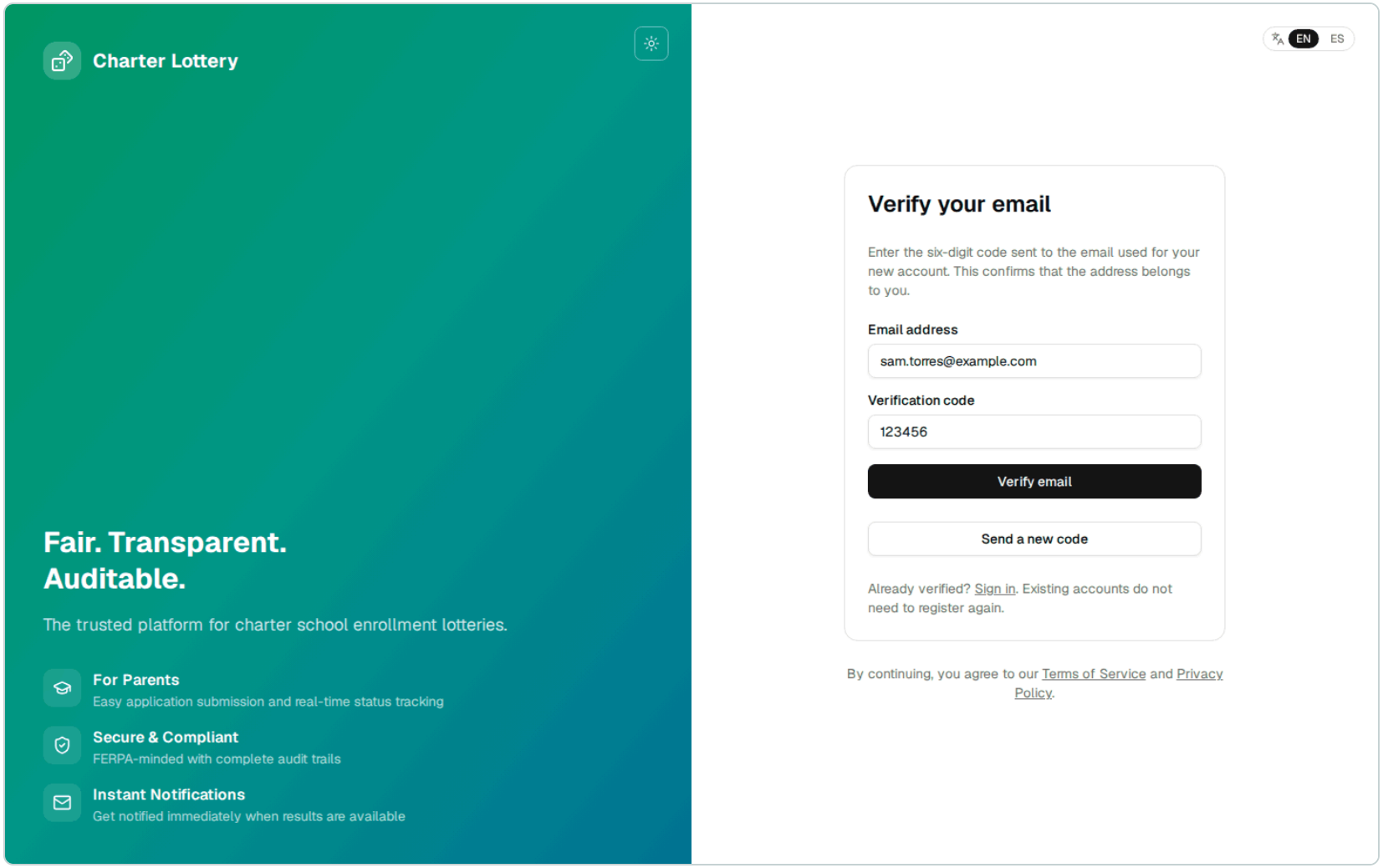


The completed form, with every password rule met.

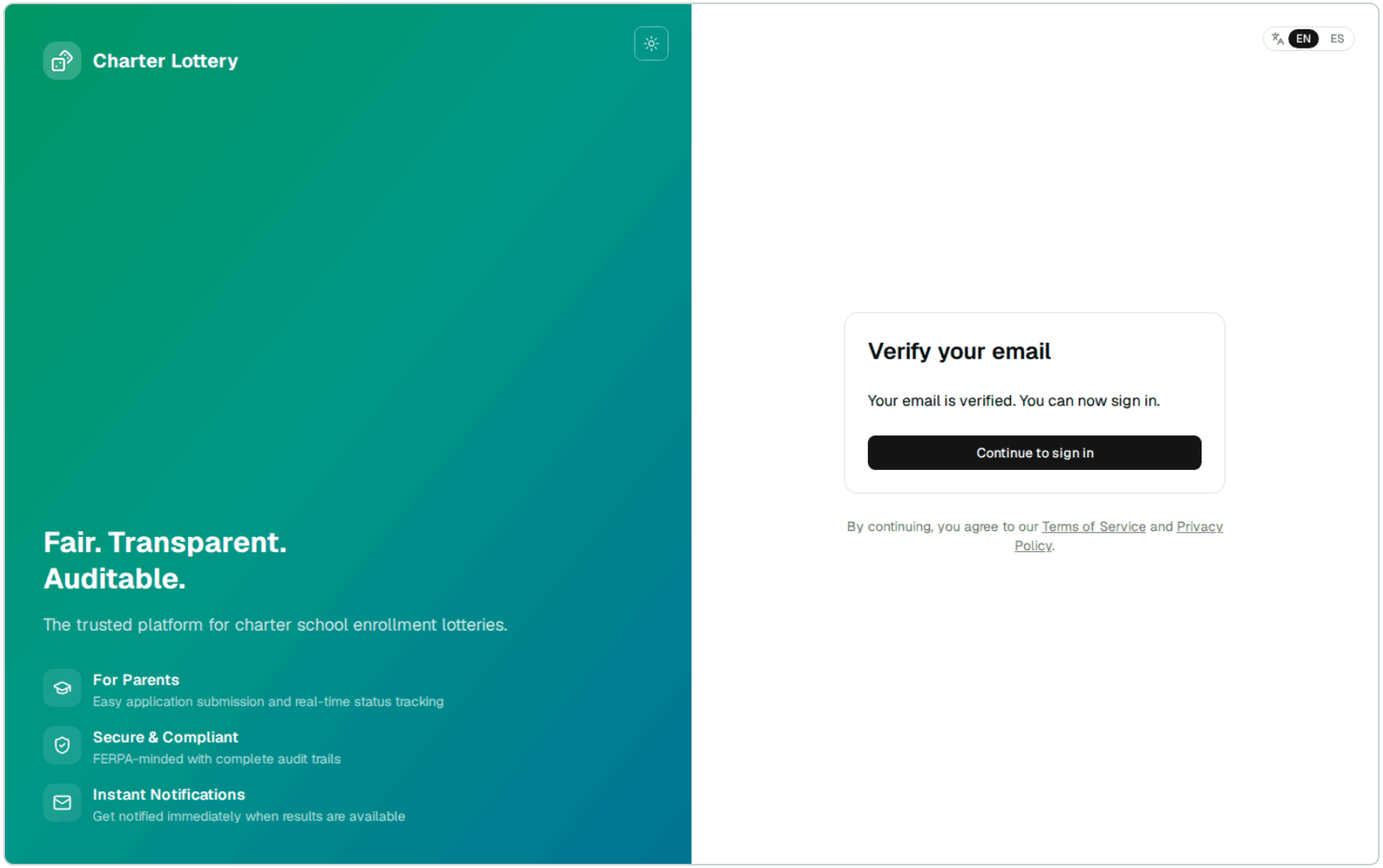
Step 3. Verify the email address

A six-digit code arrives from `support@charterlottery.com`. Enter it and select **Verify email**. If it does not arrive, check quarantine, then use

Send a new code.



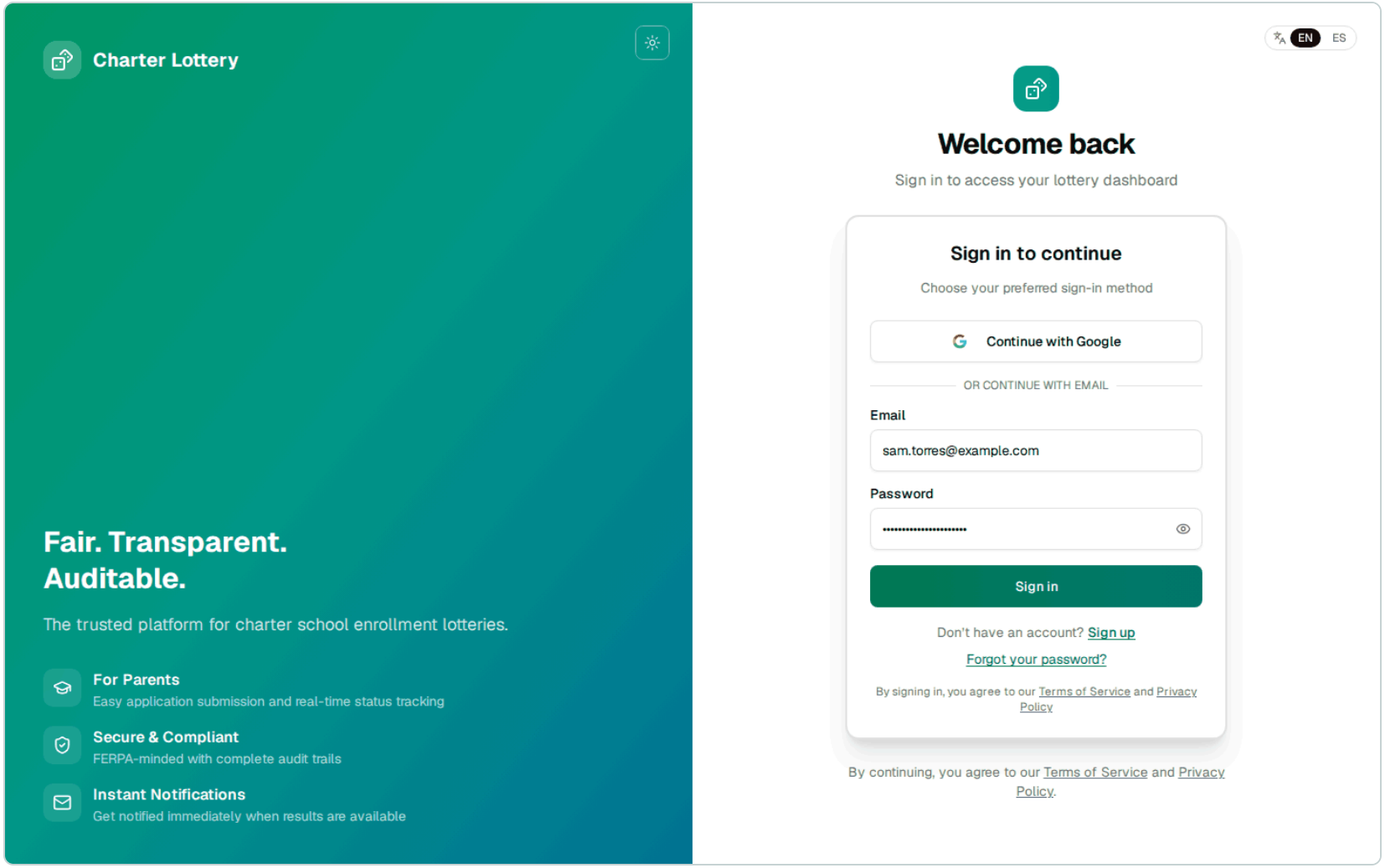
Enter the six-digit code.



Confirmation. Continue to sign in.

Step 4. Sign in

Sign in with the new email and password.

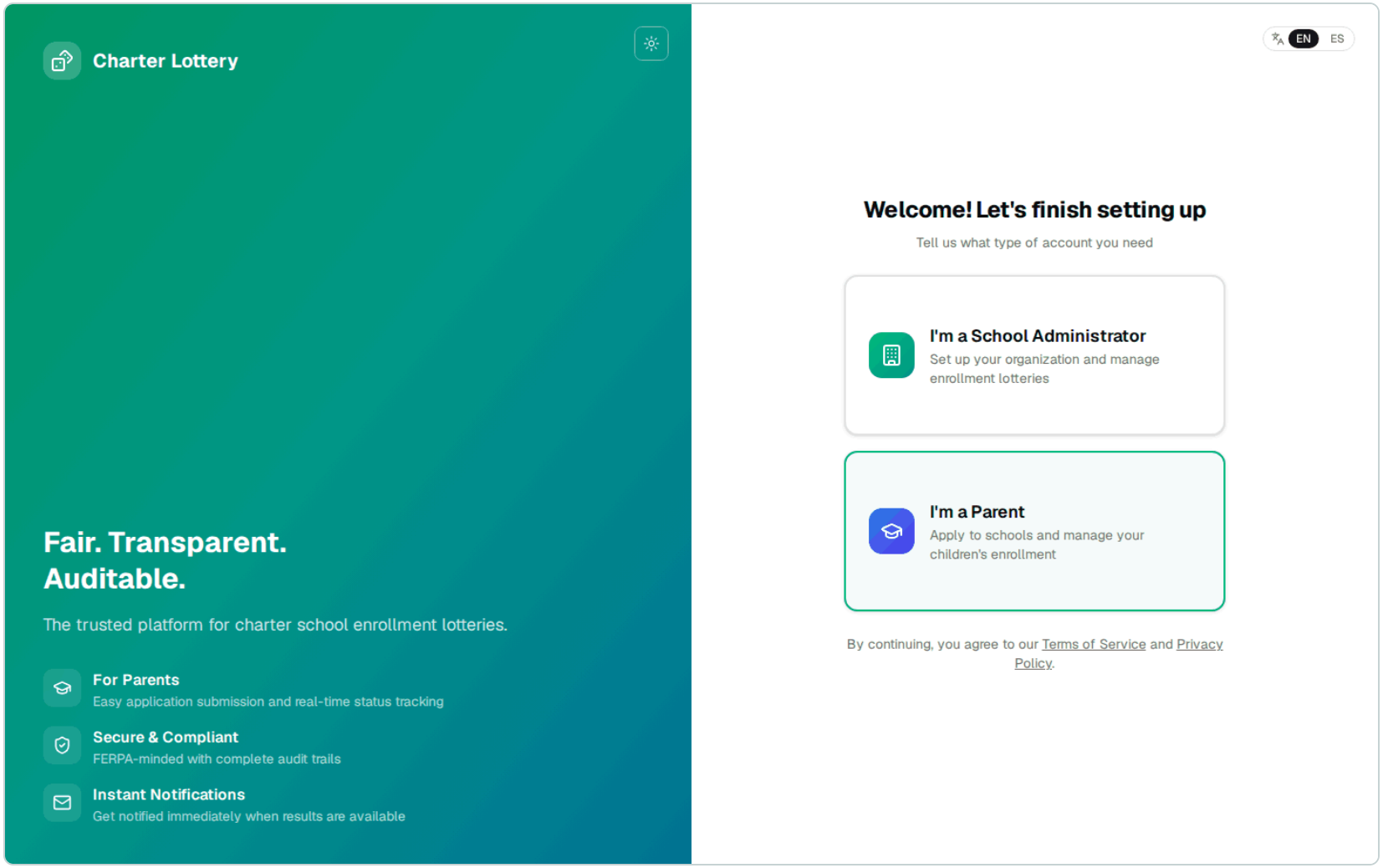


The sign-in page.

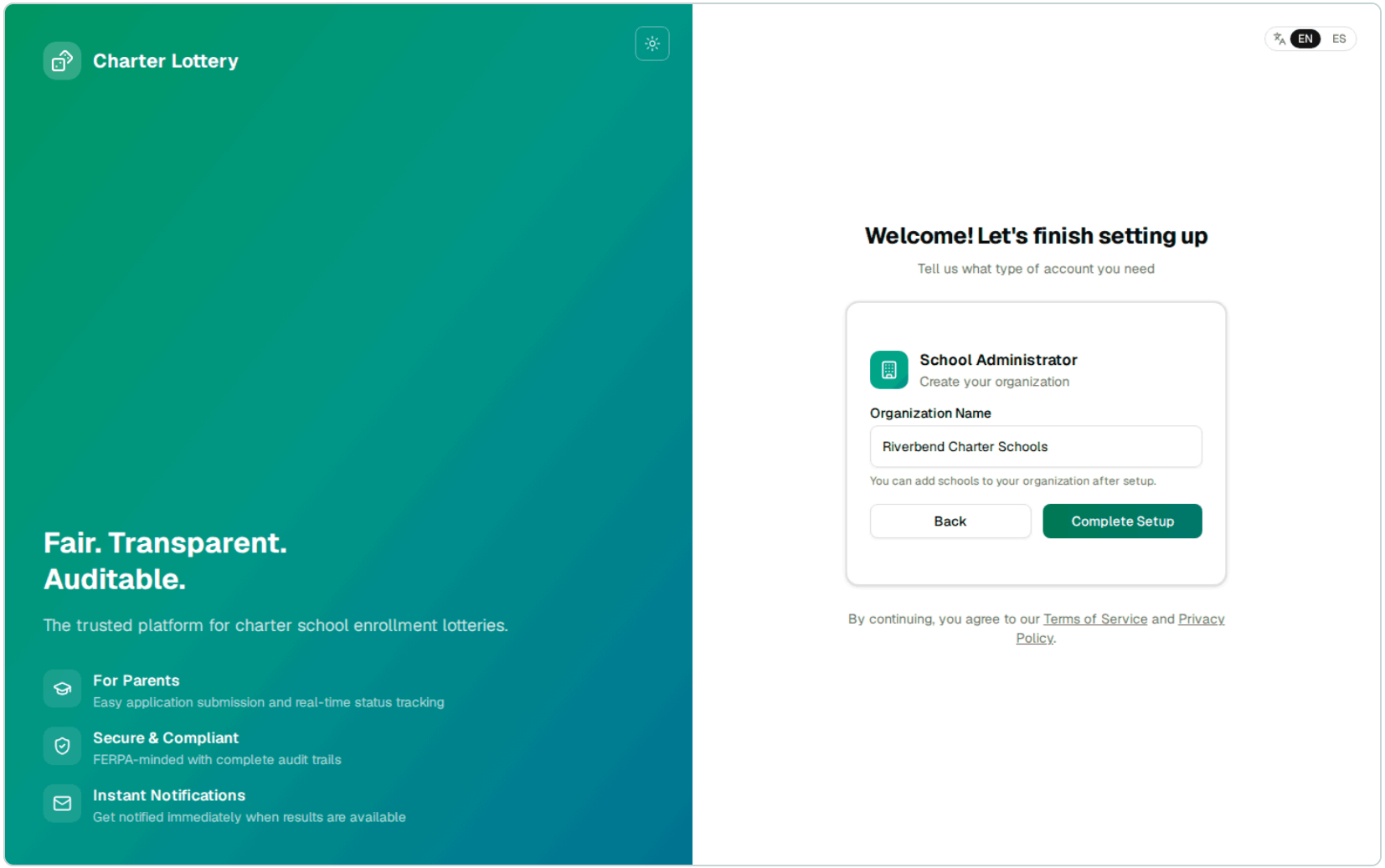
Step 5. Google Workspace alternative

Choosing **Continue with Google** replaces Steps 2 to 4. After Google, Charter Lottery asks what kind of account you need. Choose **I'm a School**

Administrator and enter the organization name.



First Google sign-in: choose the account type.



Name the organization and select Complete Setup.

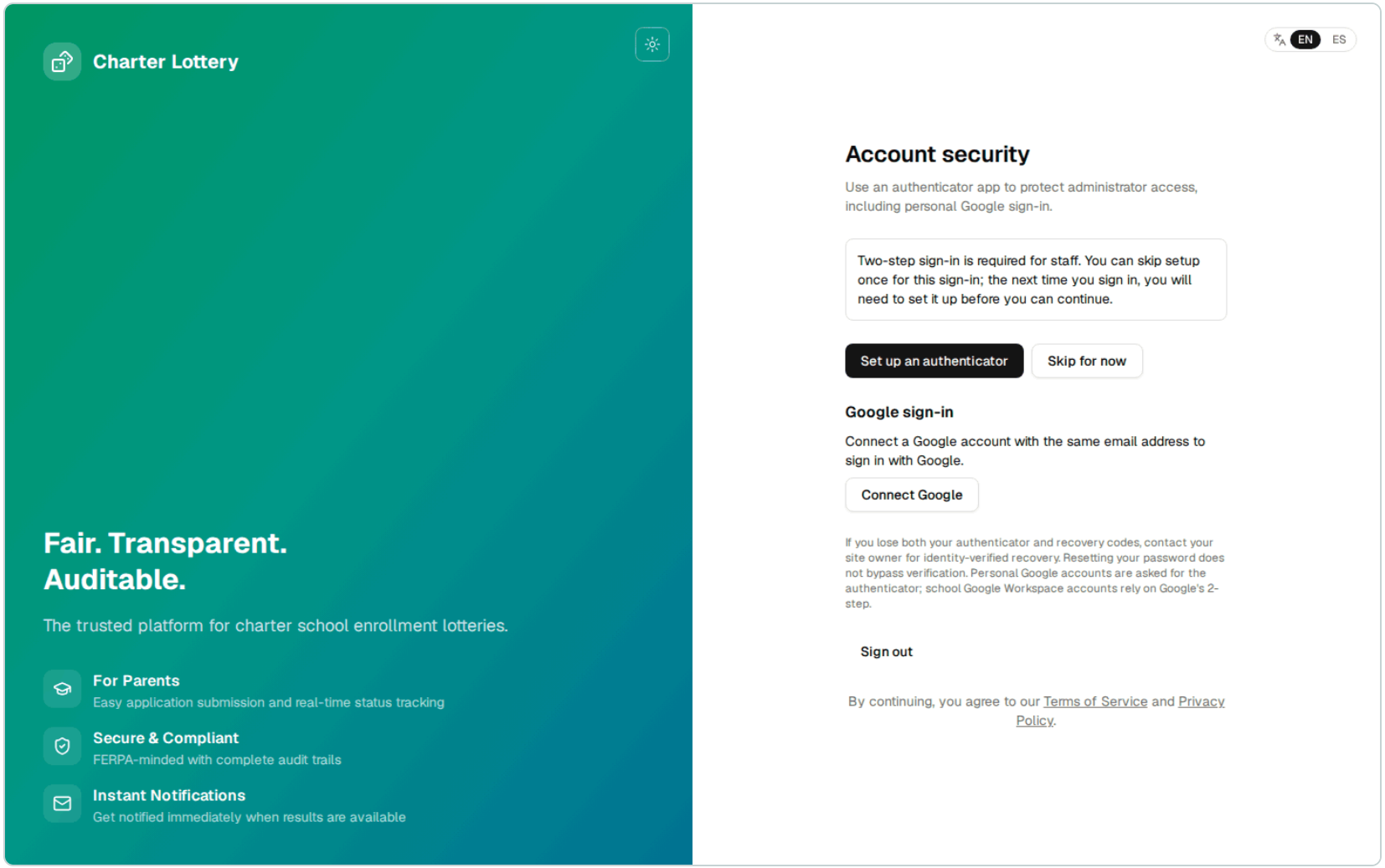
PART 2

Secure the account

Step 6. Set up two-step sign-in

Staff are taken to **Account security**. Select **Set up an authenticator**. Any app that supports time-based codes works: Microsoft Authenticator, Google Authenticator, 1Password or Authy.

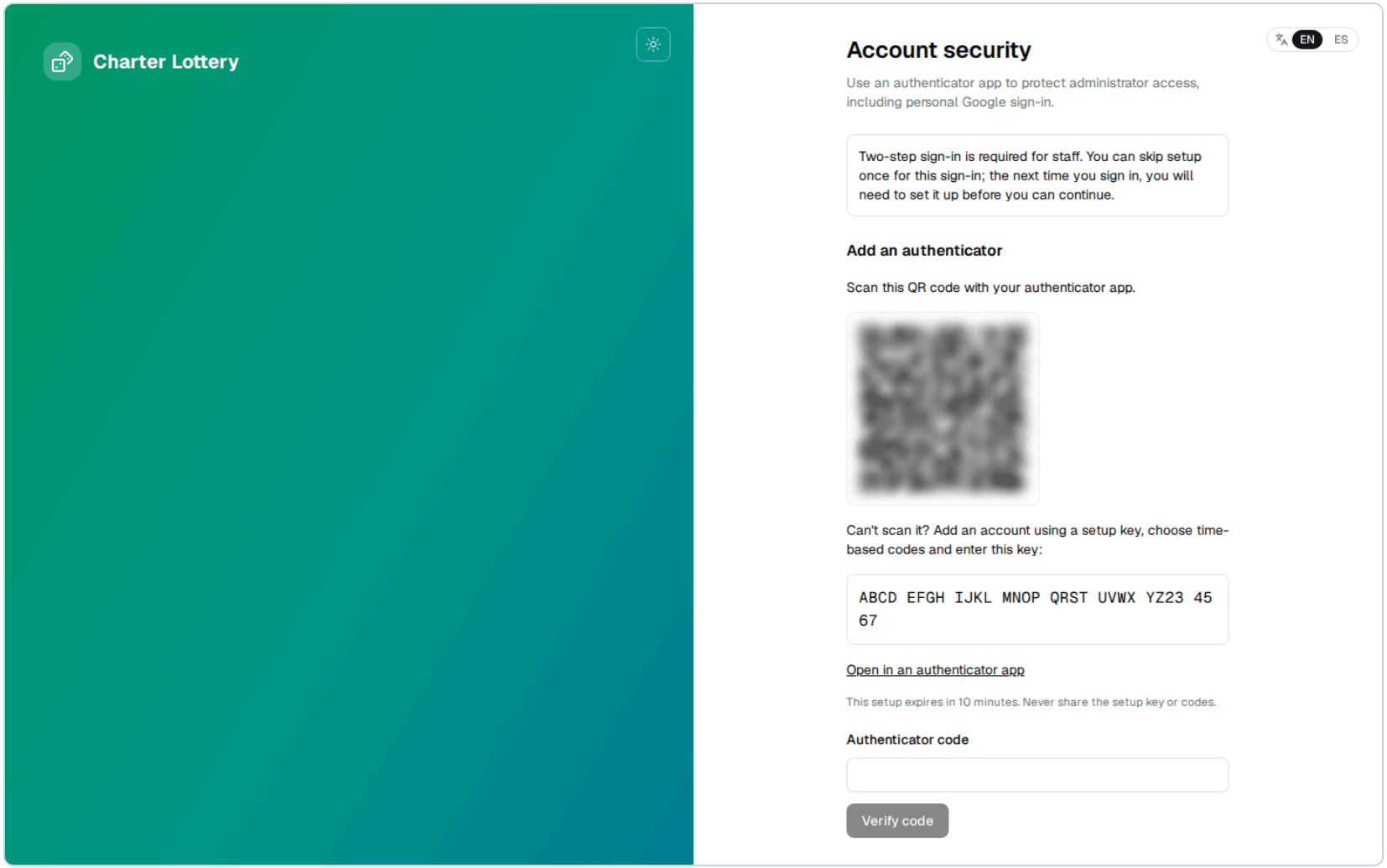
Skip for now works once. The next sign-in requires setup. Staff signing in with a Google Workspace account are not asked, because Google's 2-Step Verification applies instead, so enforce it in the Google Admin console.



Account security on first sign-in.

Step 7. Scan the QR code

Scan the QR code with the authenticator app, or enter the setup key shown below it. Then enter the six-digit code and select **Verify code**. The setup expires after 10 minutes. The QR code and key are masked in this picture.

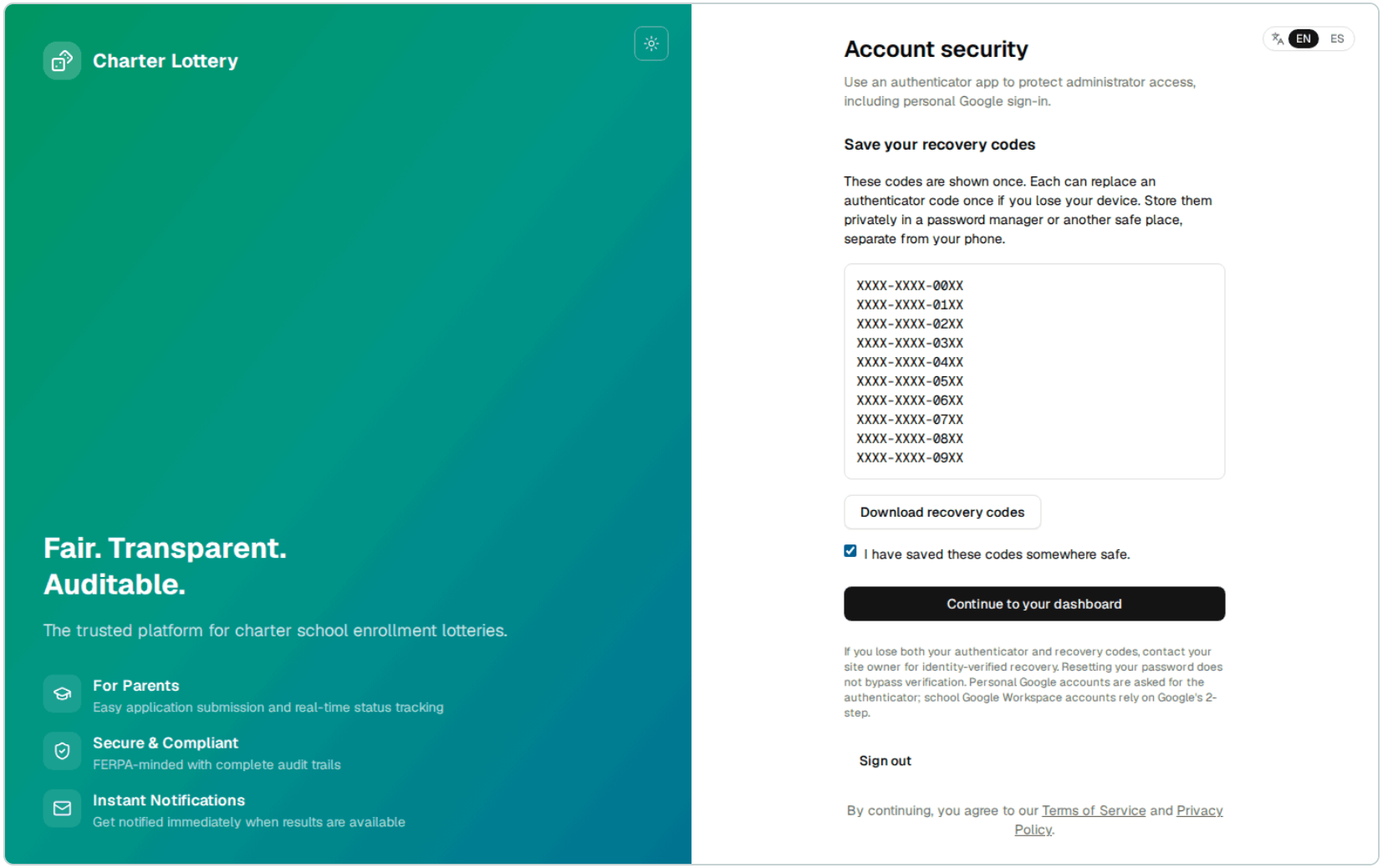


The QR code and setup key, masked.

Step 8. Save the recovery codes

The 10 recovery codes are shown once. Put them in your password manager, away from the phone, tick the confirmation, then select **Continue to your dashboard**. Connect Google is optional and available later on Account security. Someone who loses both the phone and the codes

needs an identity check through Charter Lottery support.

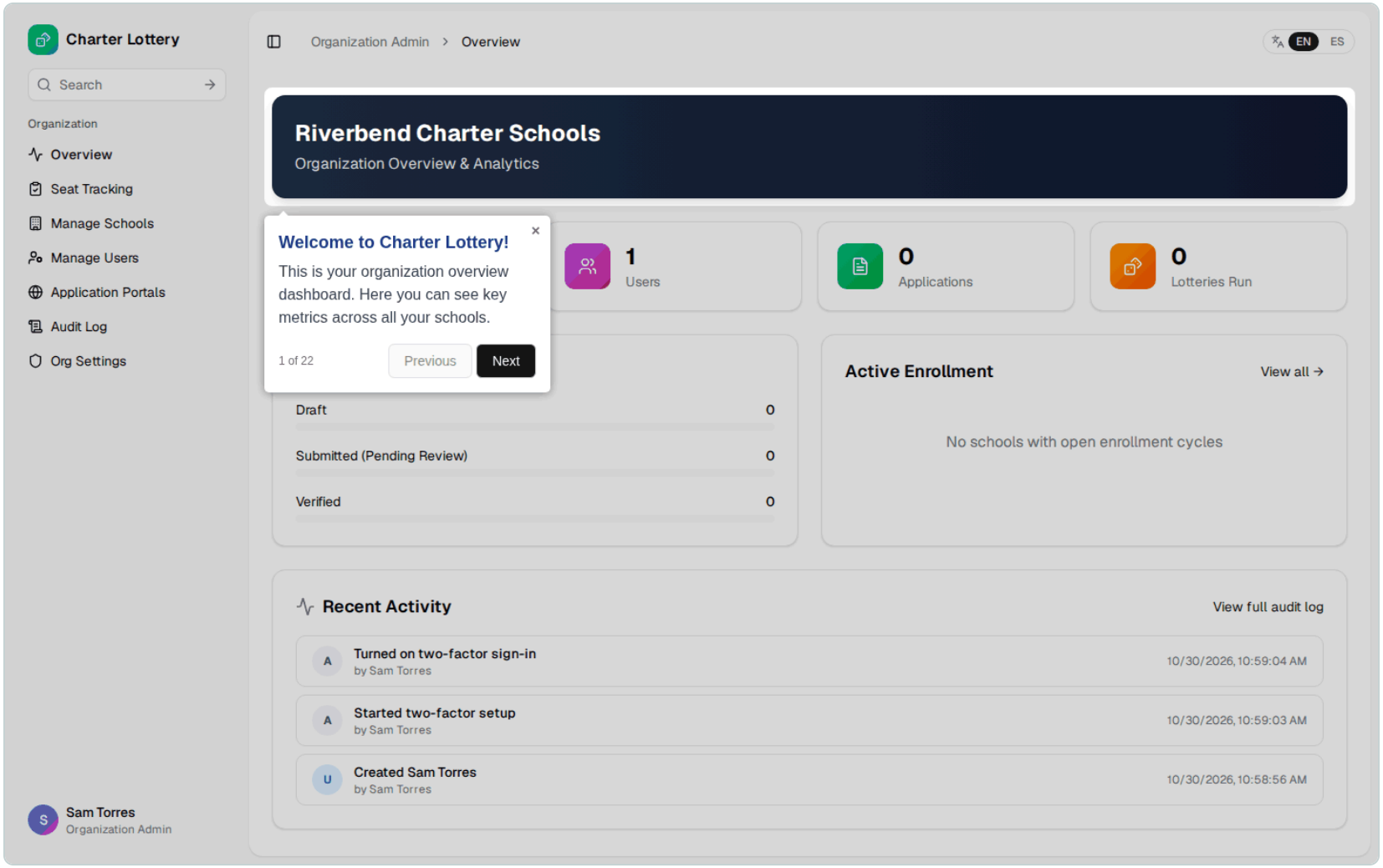


Recovery codes, masked in this picture.

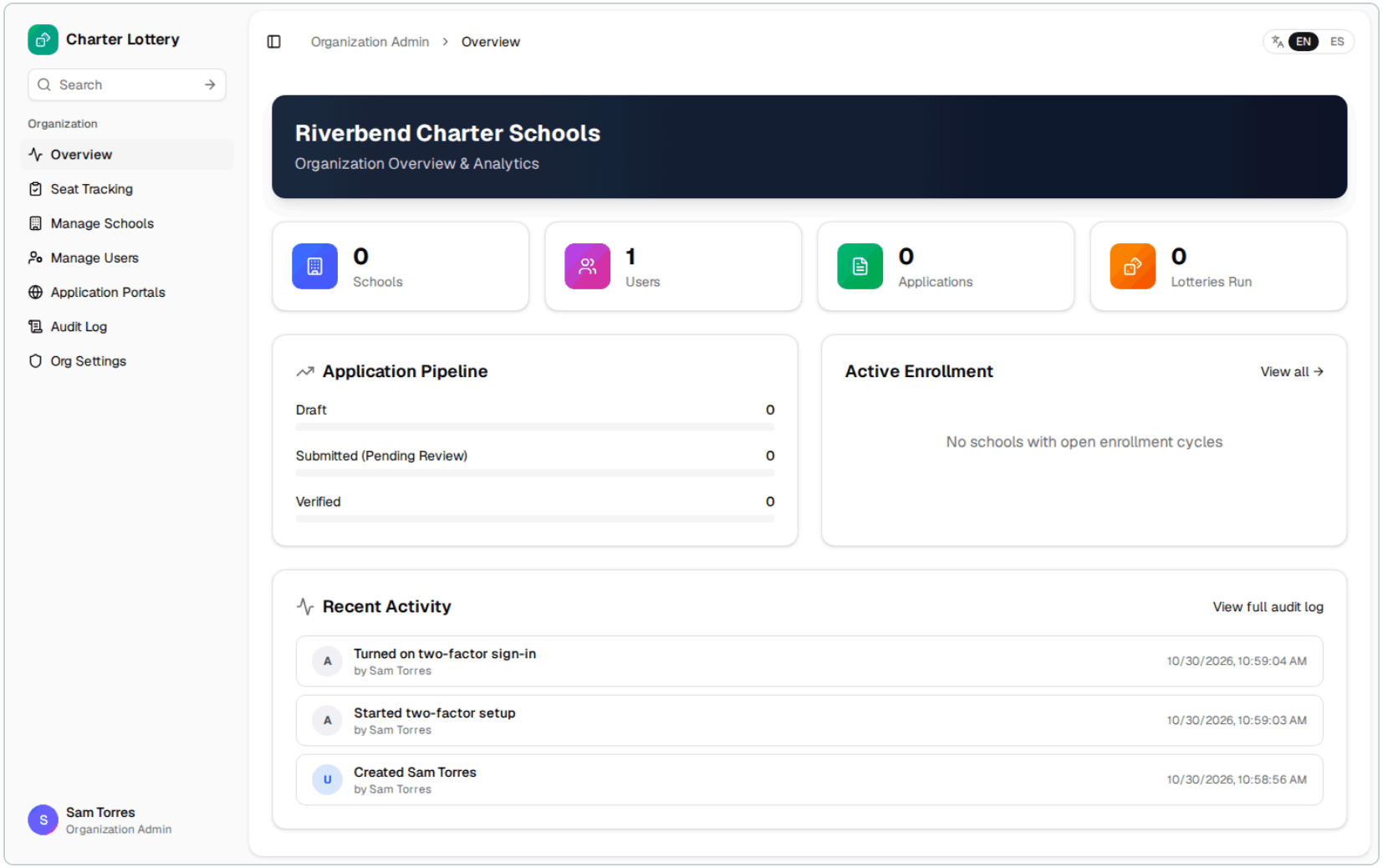
Step 9. Take or dismiss the welcome tour

Organization Admins get a 22-step tour on first arrival. Close it with × and restart it later from Account Settings. Demo pages in the tour use

sample data.



The first tour step.



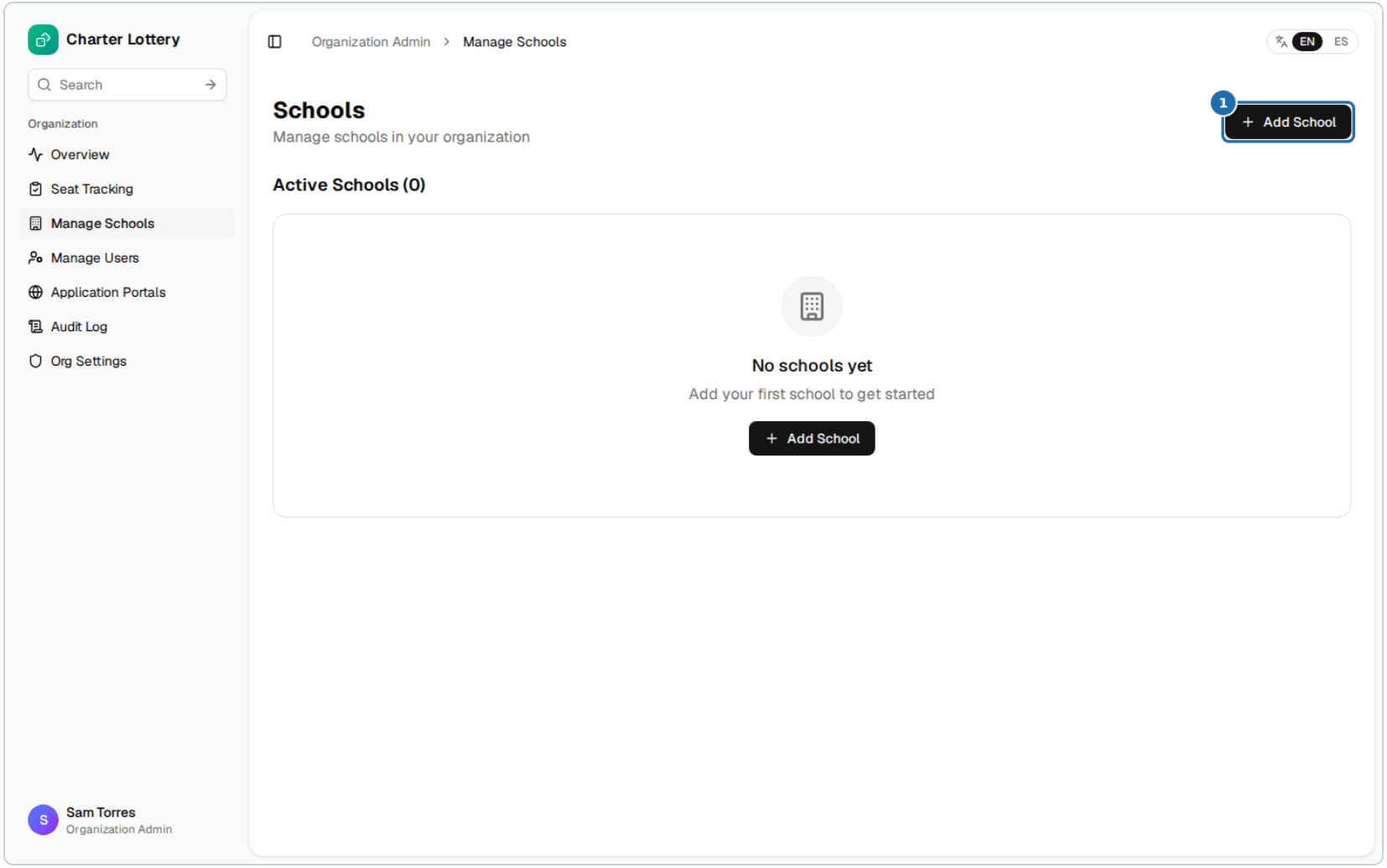
The Overview page before any schools exist.

PART 3

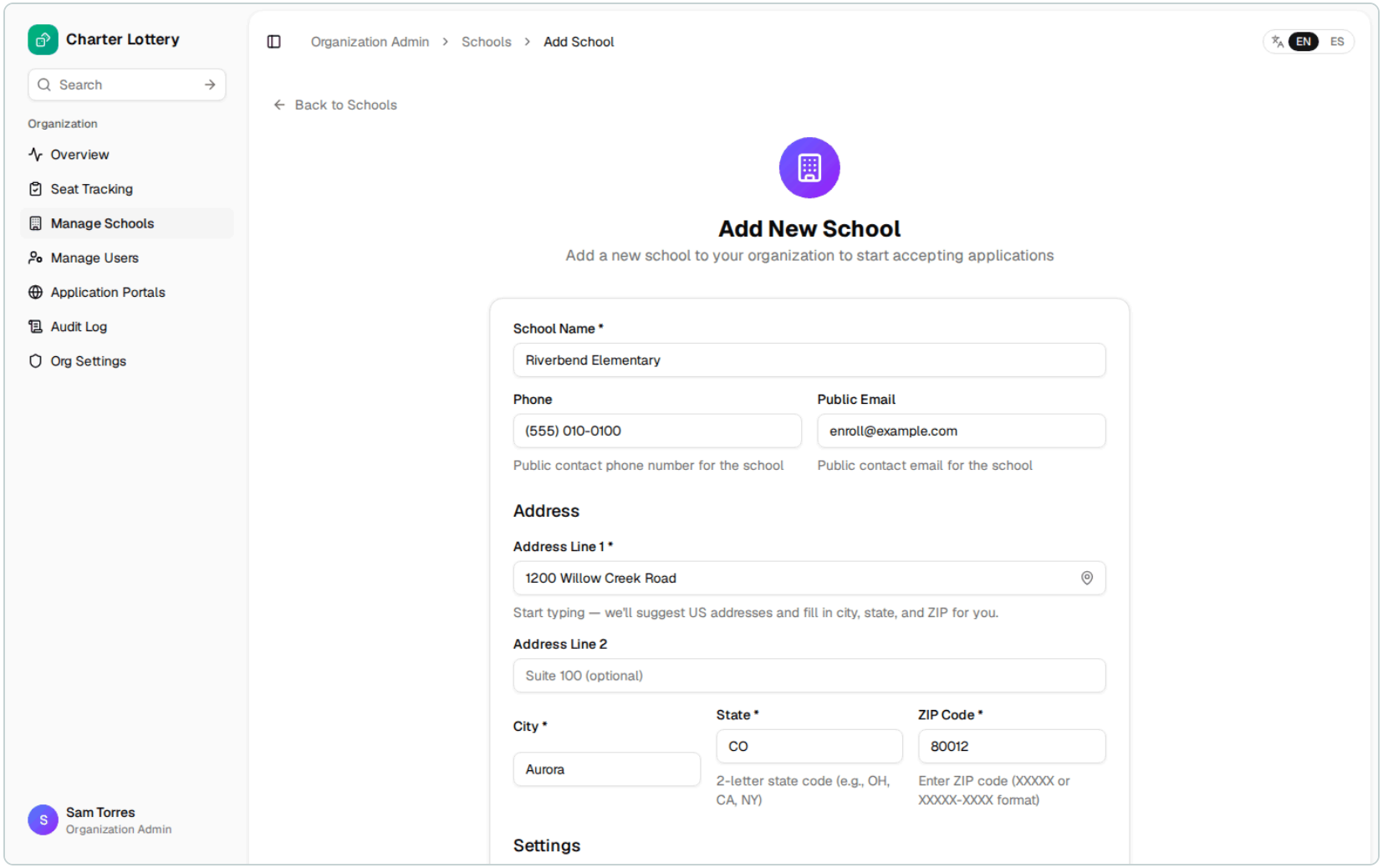
Add the schools

Step 10. Add each campus

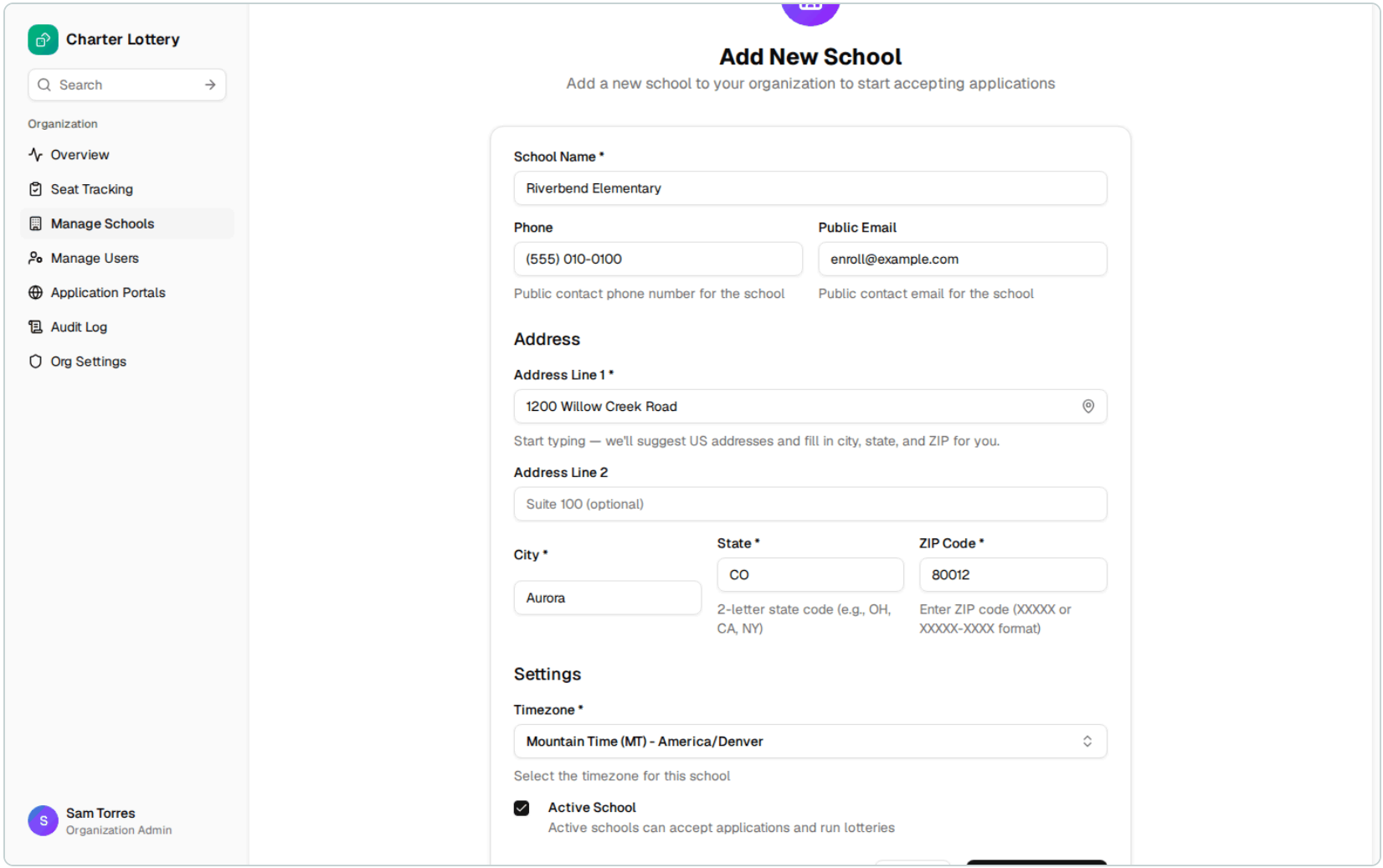
Choose **Manage Schools**, then **Add School**. On the live site, typing the street address offers suggestions that fill in city, state and ZIP. Check the **Timezone**, because deadlines display in it. Keep **Active School** ticked. Select **Create School** and repeat for each campus.



No schools yet. Add School is marked 1.



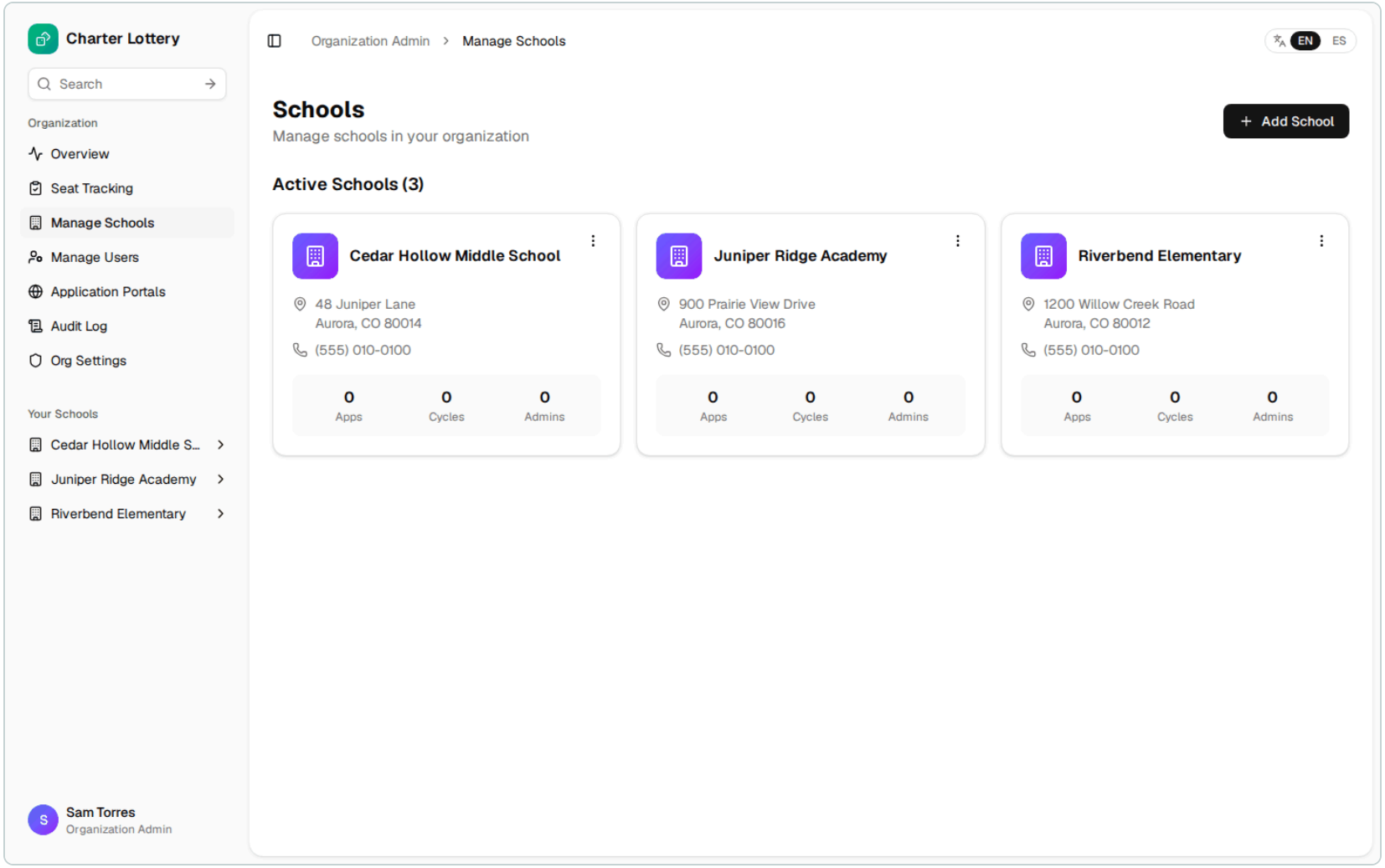
School details.



Address, time zone and active status.

Step 11. Confirm the list

Each campus runs its own lotteries and has its own subscription.



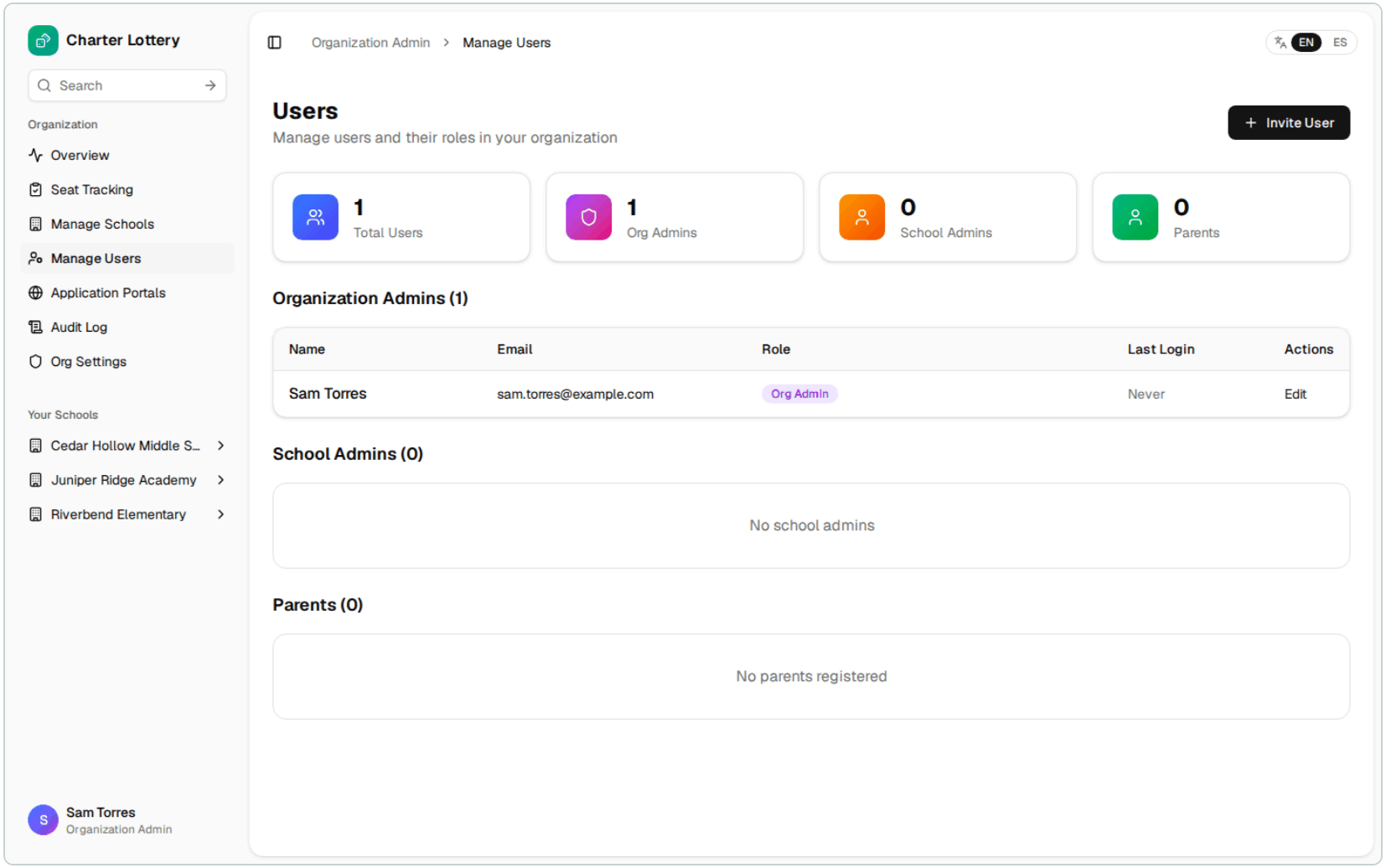
Three campuses in one organization.

PART 4

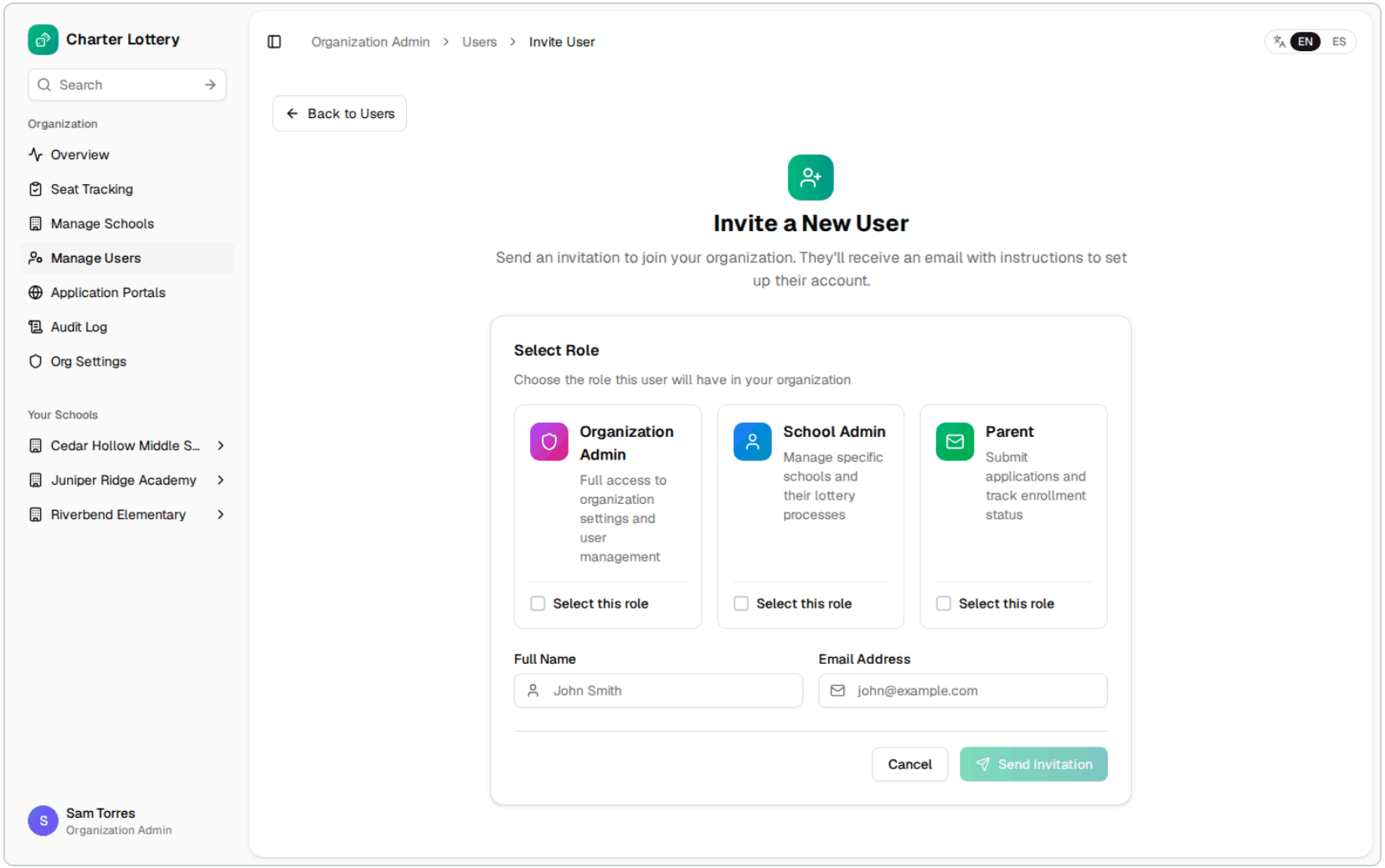
Invite the staff

Step 12. Choose a role

Choose **Manage Users**, then **Invite User**. **Organization Admin** covers every school, users, settings and billing. **School Admin** covers only the schools you tick. Parents normally create their own accounts through the portal.



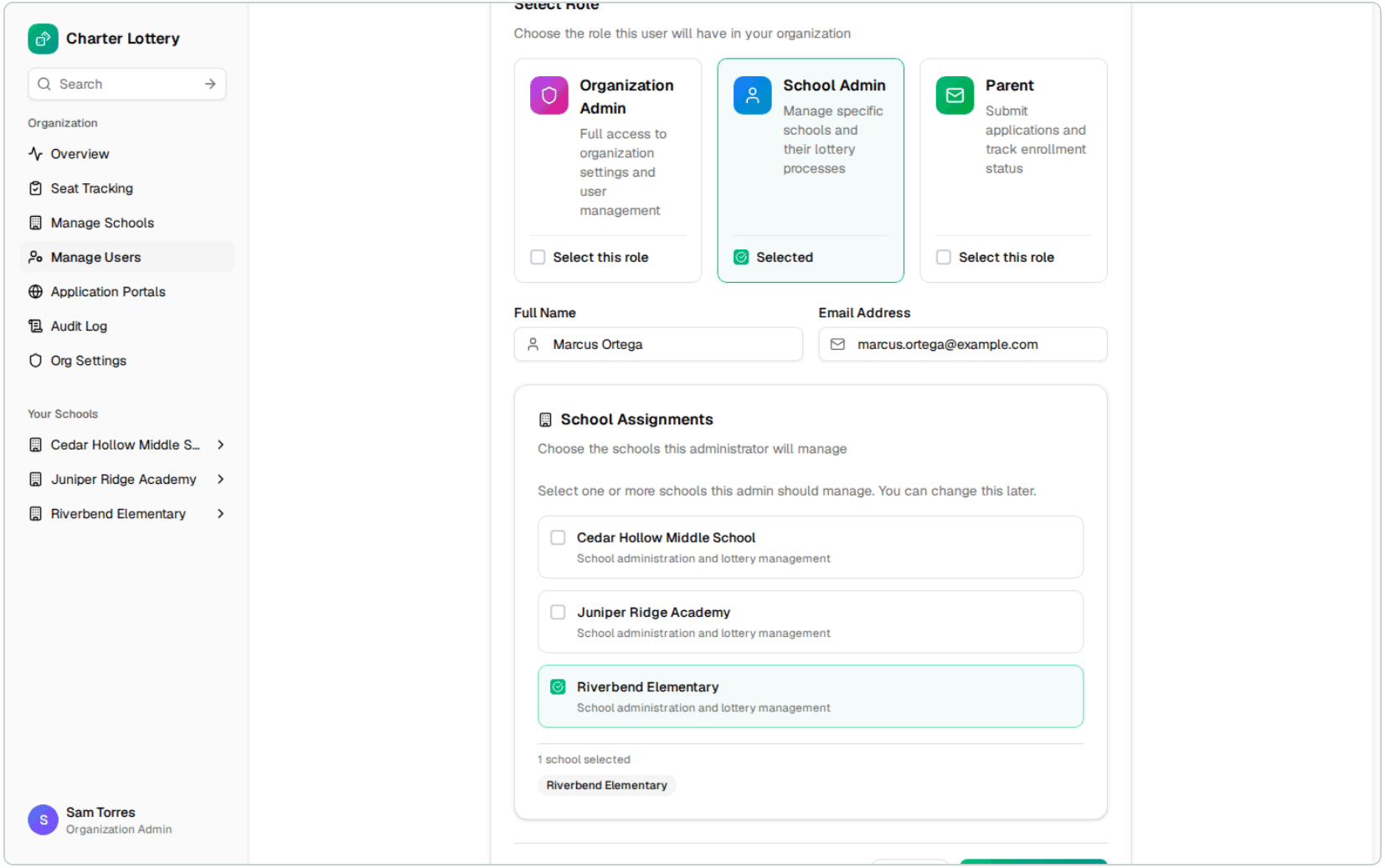
The Users page.



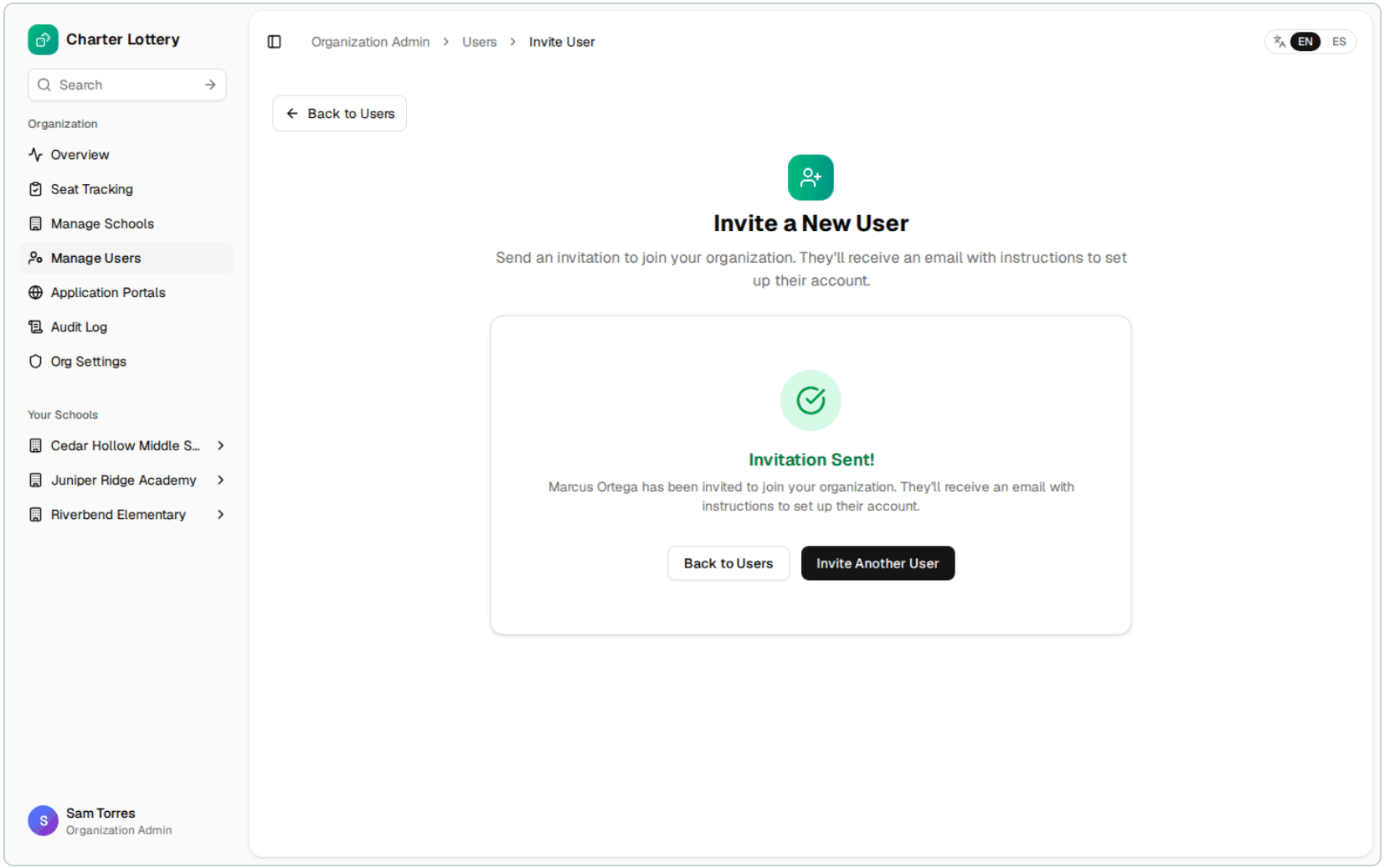
Role selection.

Step 13. Send the invitation

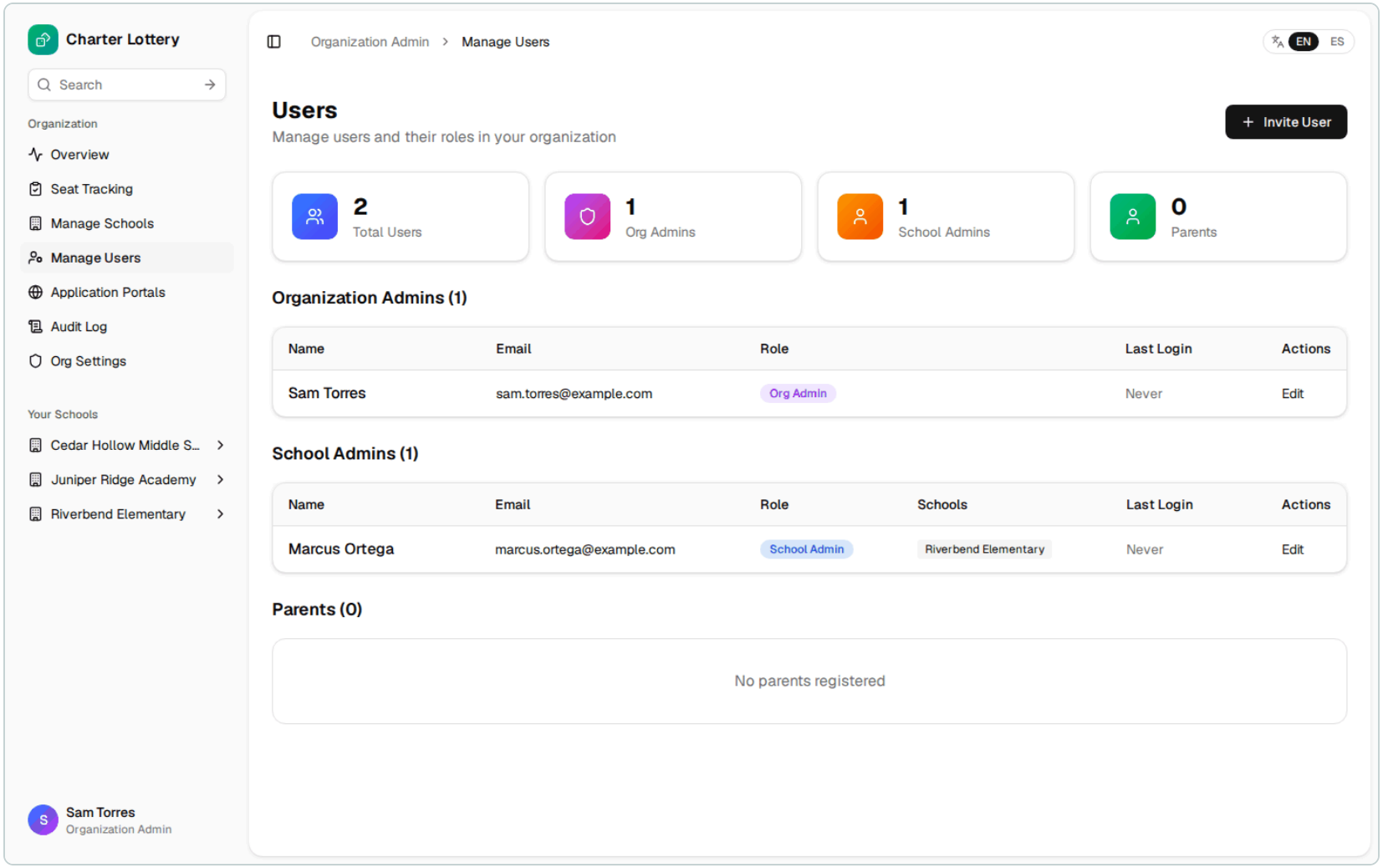
Enter the name and email, tick the schools for a School Admin, and select **Send Invitation**. The person appears in the list straight away.



A School Admin assigned to one campus.



Confirmation.

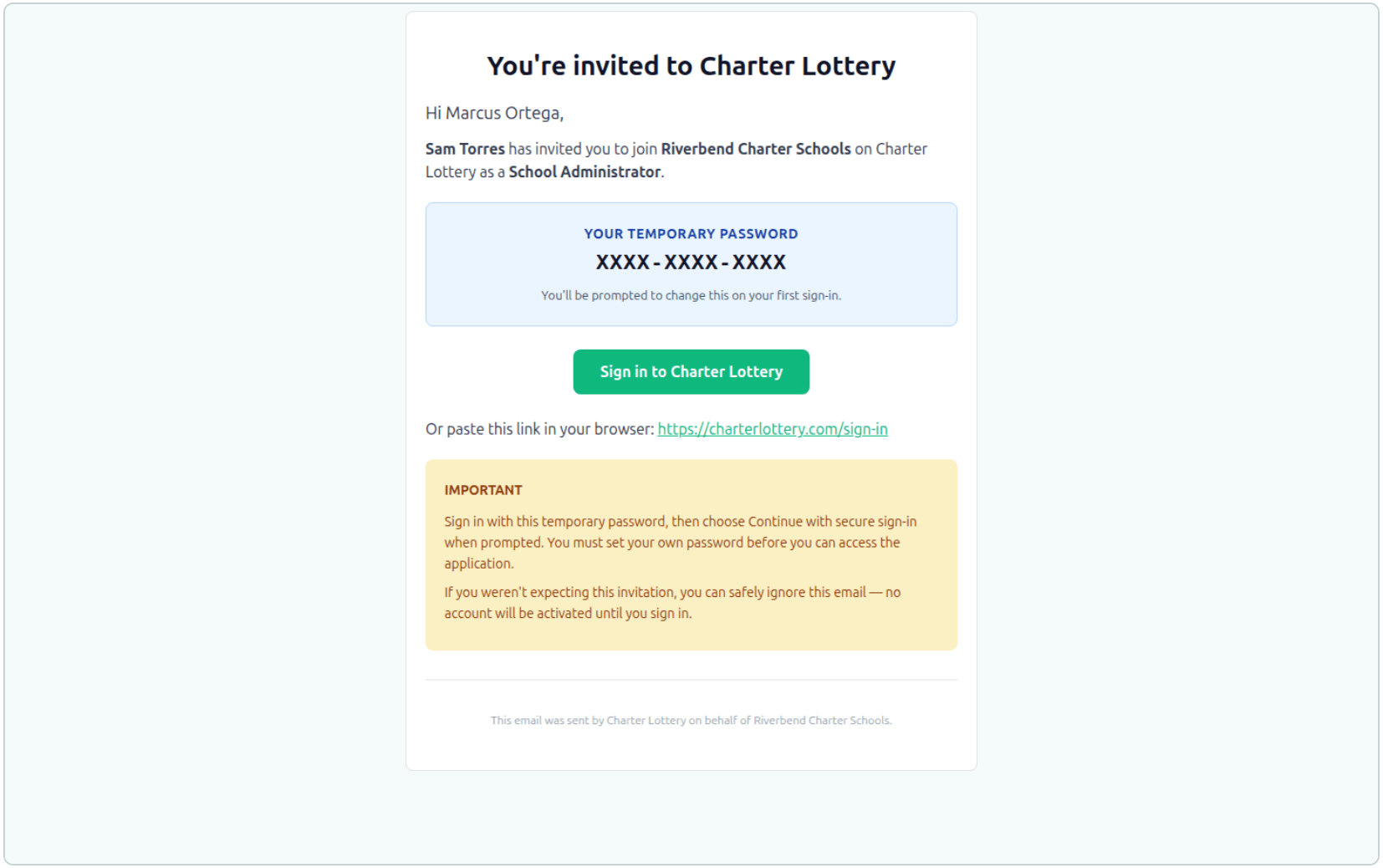


The invited user in the list.

Step 14. What the invitee receives

The email comes from `noreply@charterlottery.com` with a temporary password valid for **7 days**. After that, open the user and resend.

Invitations are in English.

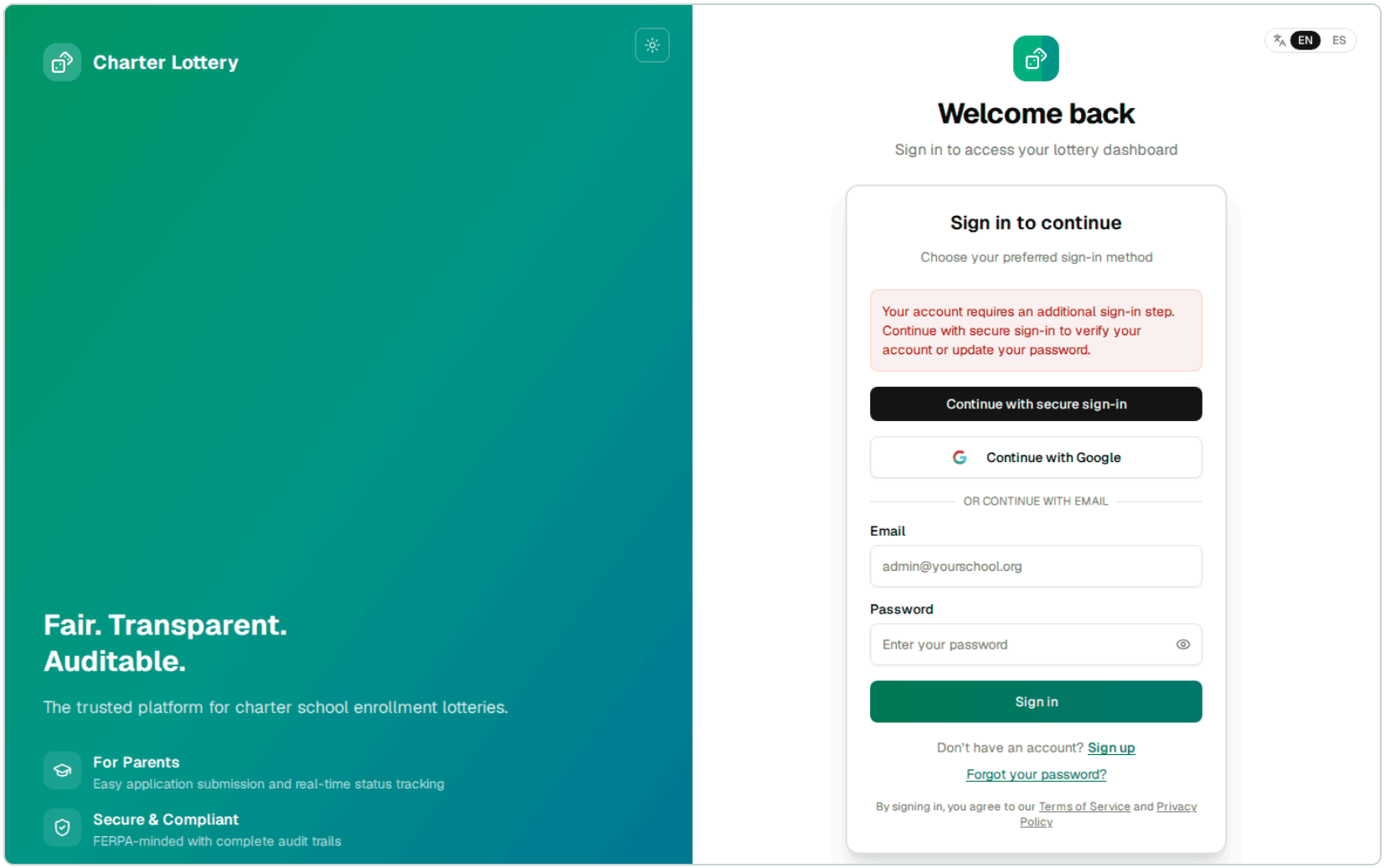


The invitation email, with the password masked.

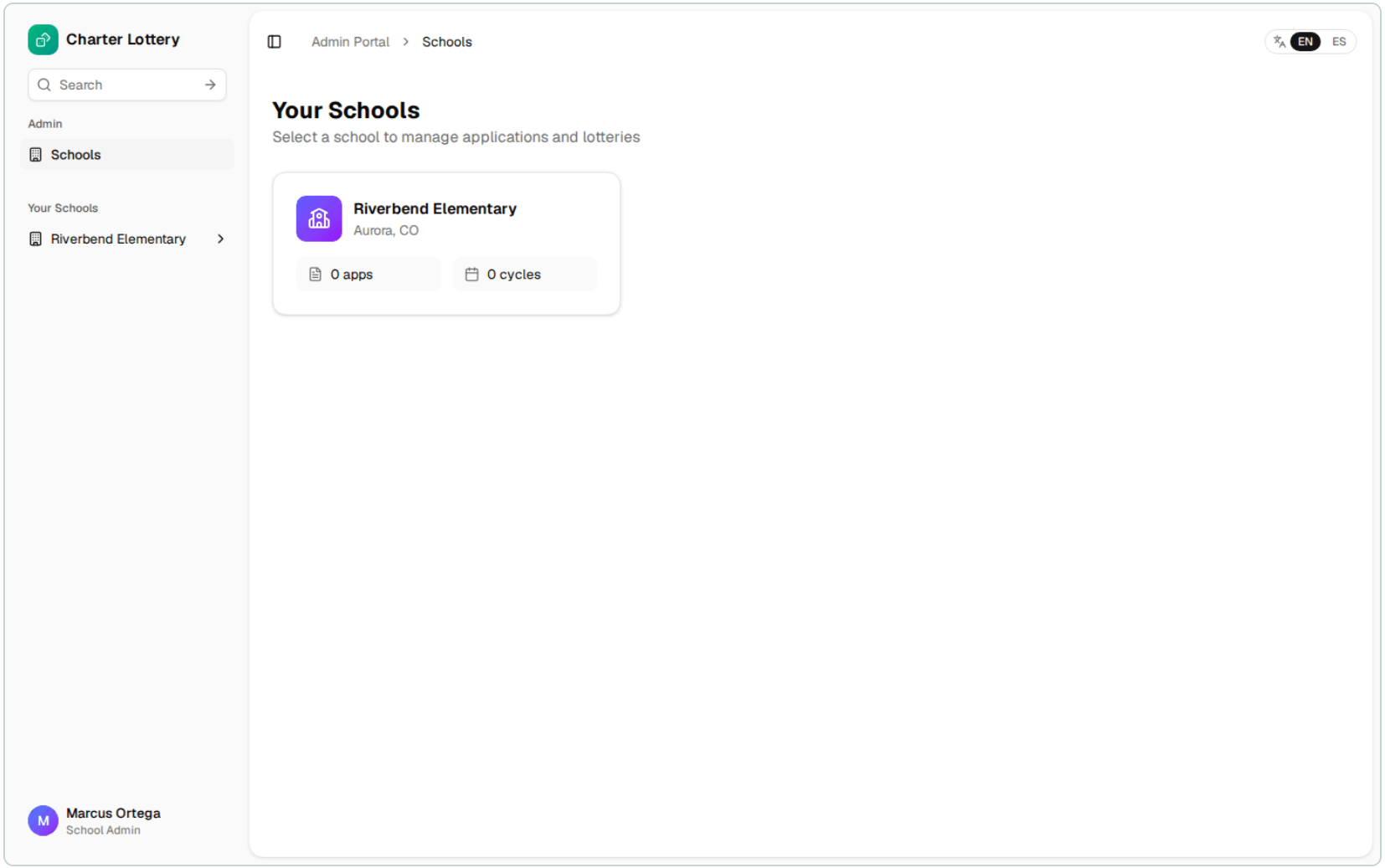
Step 15. The invitee's first sign-in

The invitee enters the temporary password on the sign-in page, then selects **Continue with secure sign-in** and sets their own password on the sign-in provider's page, which is not pictured. Two-step setup follows.

An invitee whose Google account uses the same verified email can choose **Continue with Google** instead, and the invitation links to that account.



The prompt after a temporary password.



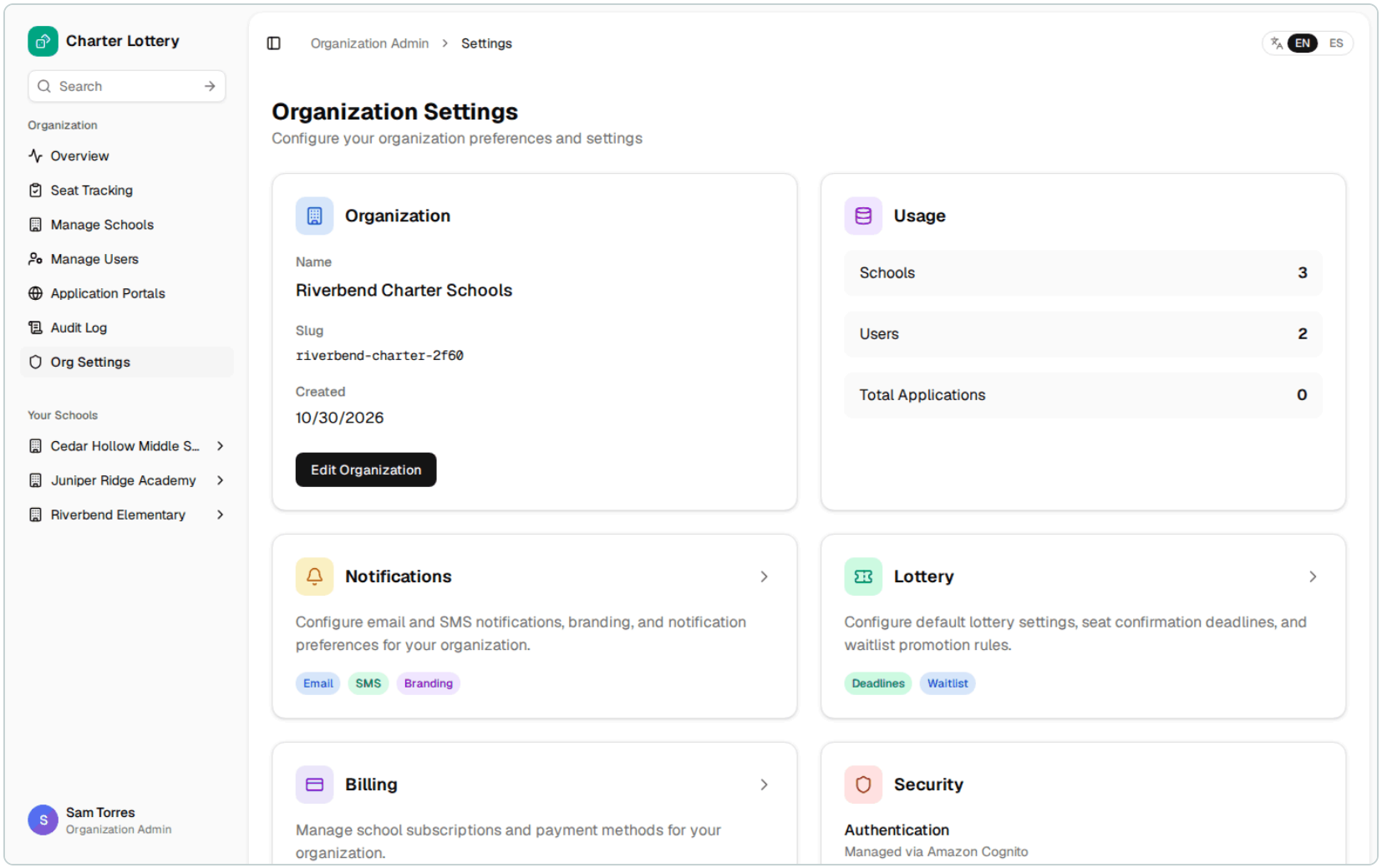
A School Admin sees only assigned schools.

PART 5

Set organization defaults

Step 16. Review settings

Org Settings holds the organization record and links to each settings page.

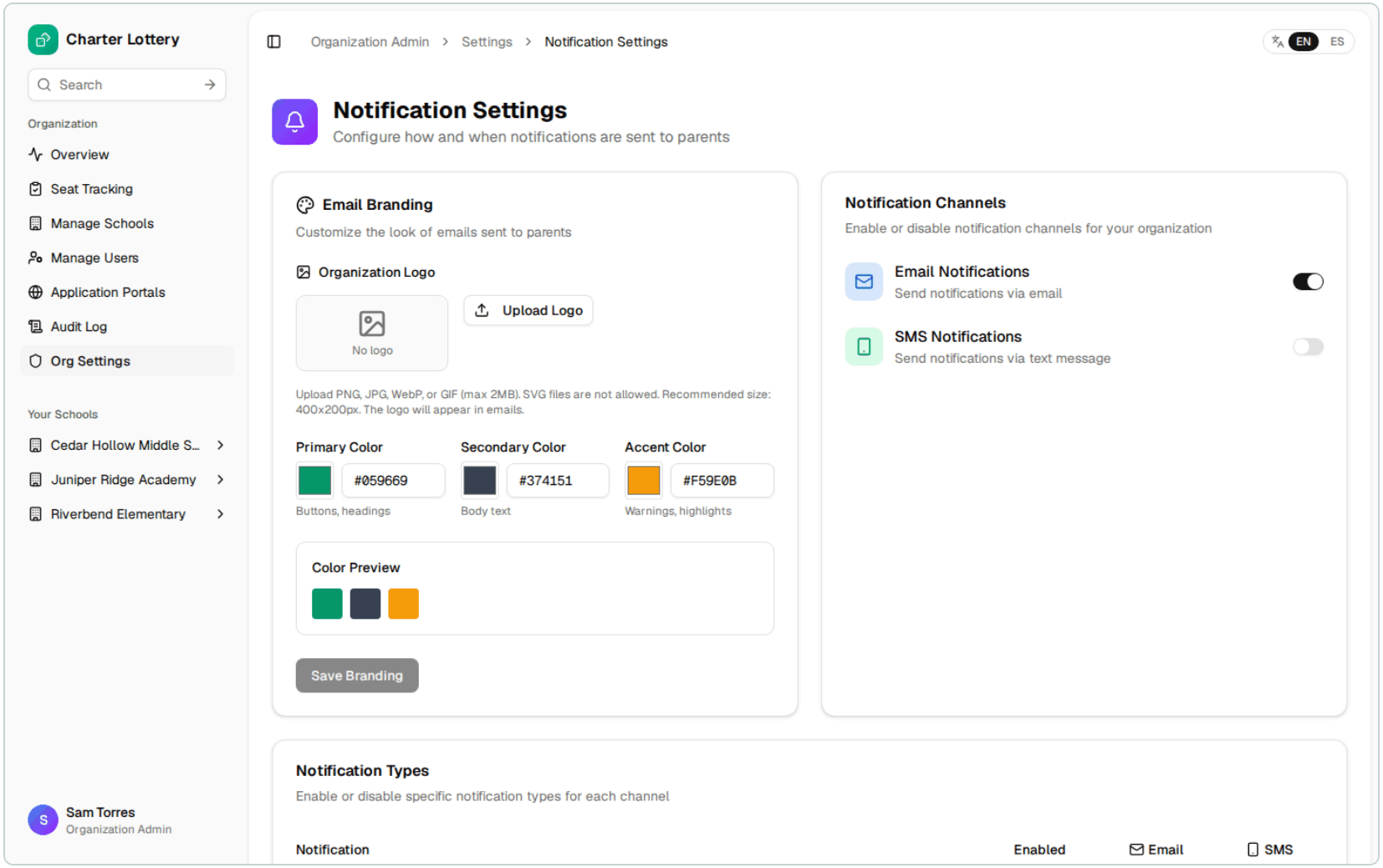


Organization Settings.

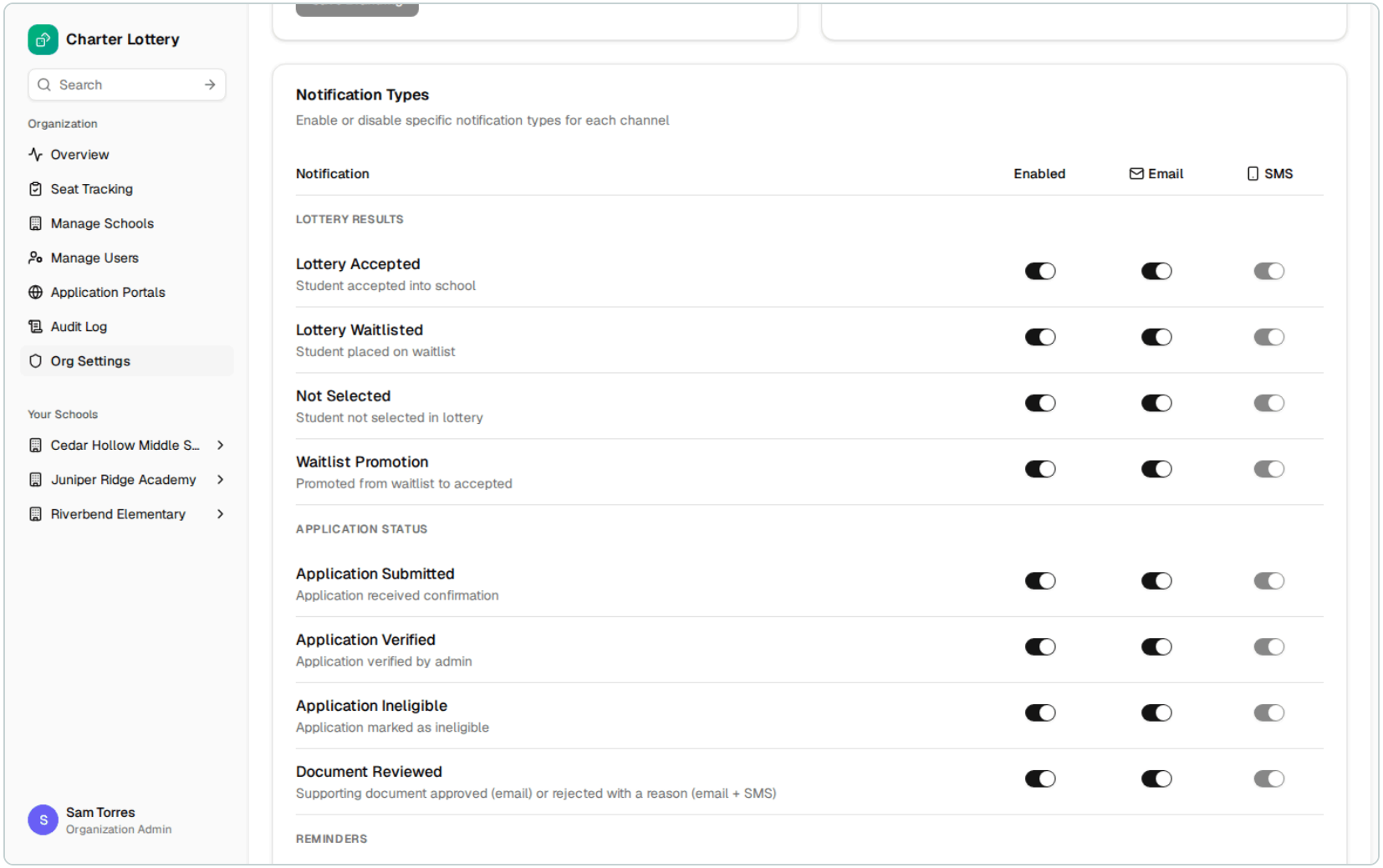
Step 17. Notifications

Add the logo and colors used on family emails. Turn email and SMS on or off for the organization, then choose each notice type by channel. SMS

starts off. Families also have to verify a mobile number and agree to texts.



Branding and channels.

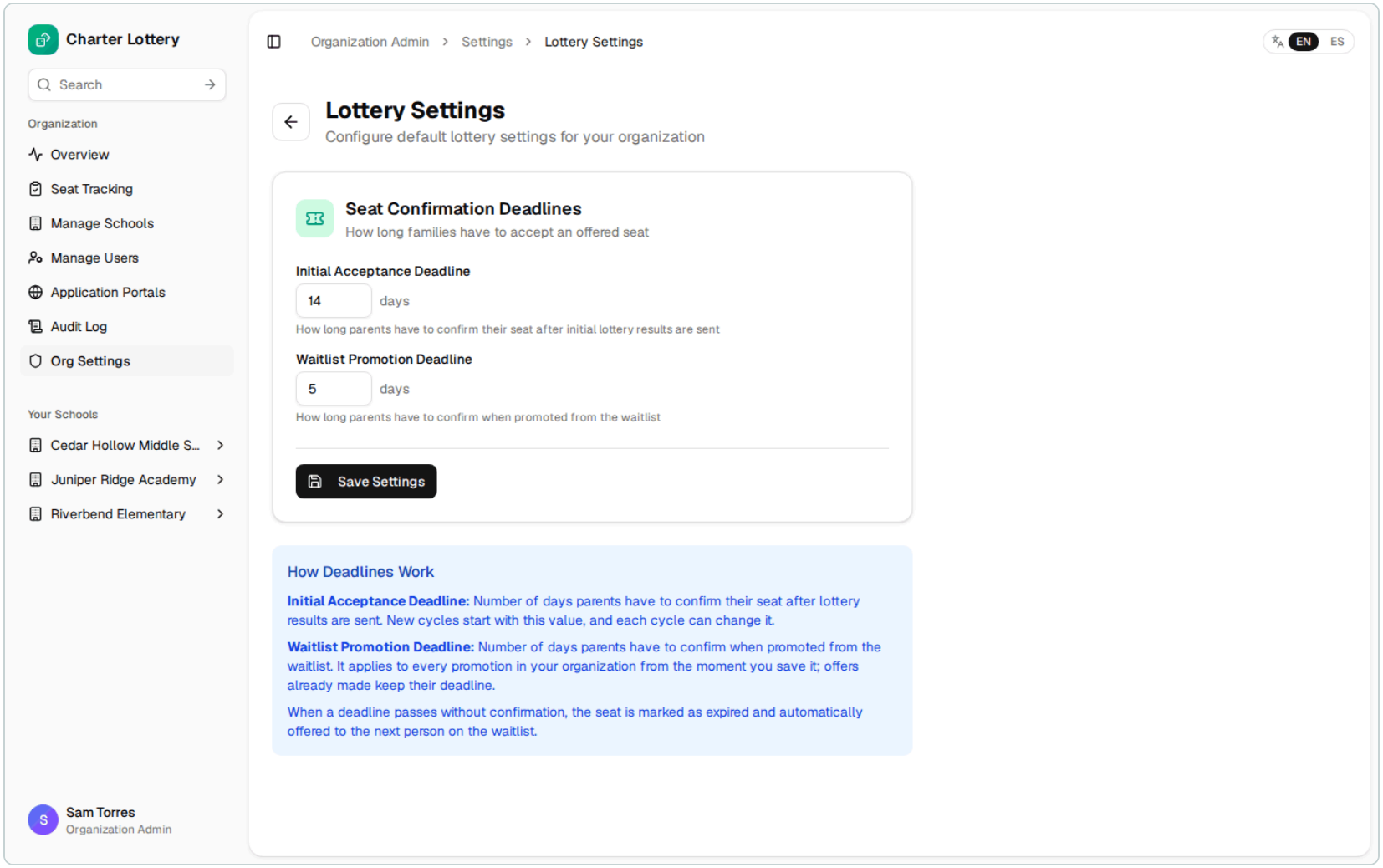


Each notice by channel.

Step 18. Lottery defaults

Set how long families have to accept a first offer, and how long they have when promoted from the waitlist. The first value fills in each new cycle,

where it can be changed.

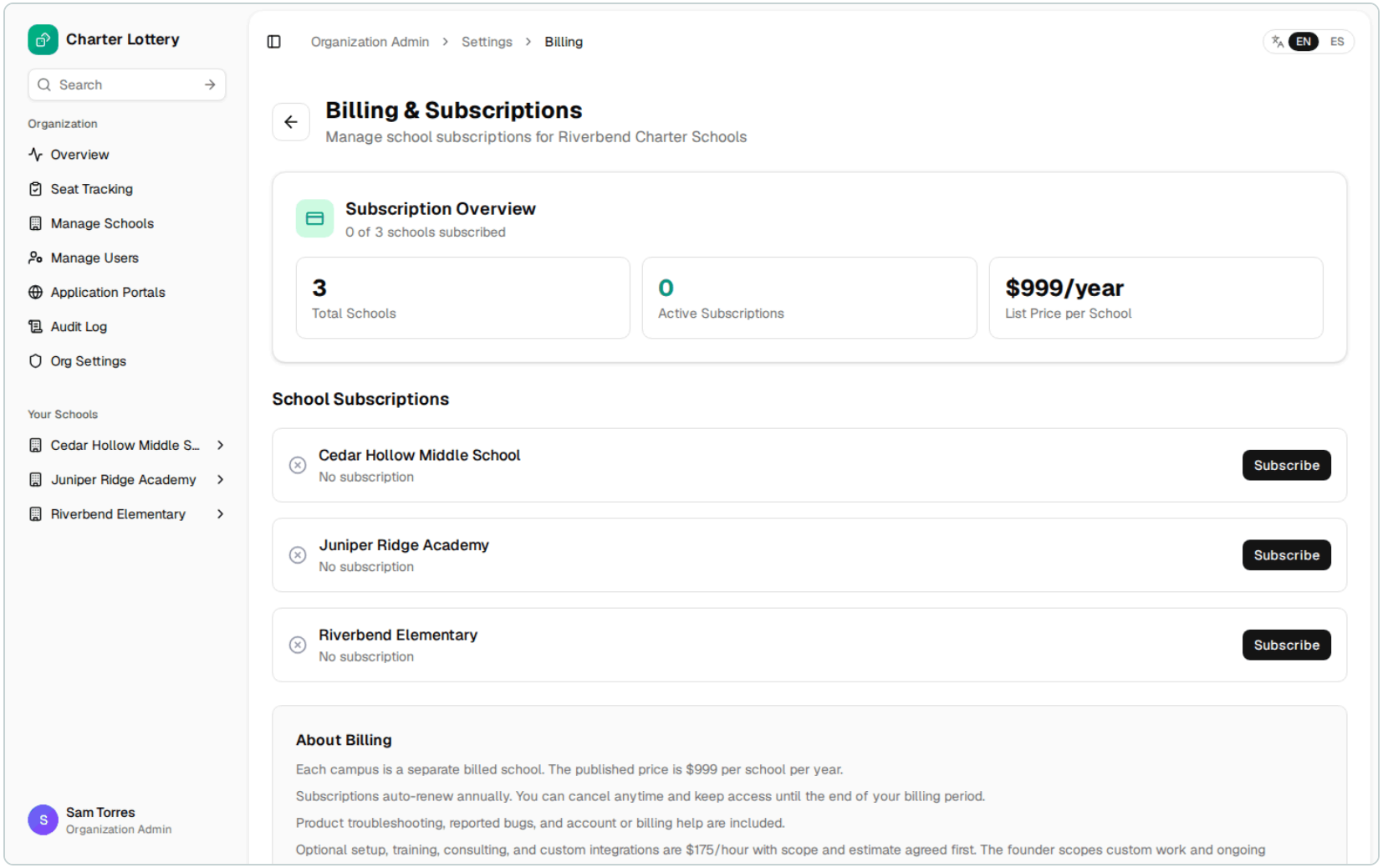


Seat confirmation deadlines.

Step 19. Billing

Each school is listed with a **Subscribe** button. Payment is by card through Stripe. You can leave this until a school is ready to run its lottery, when

Charter Lottery prompts for it.



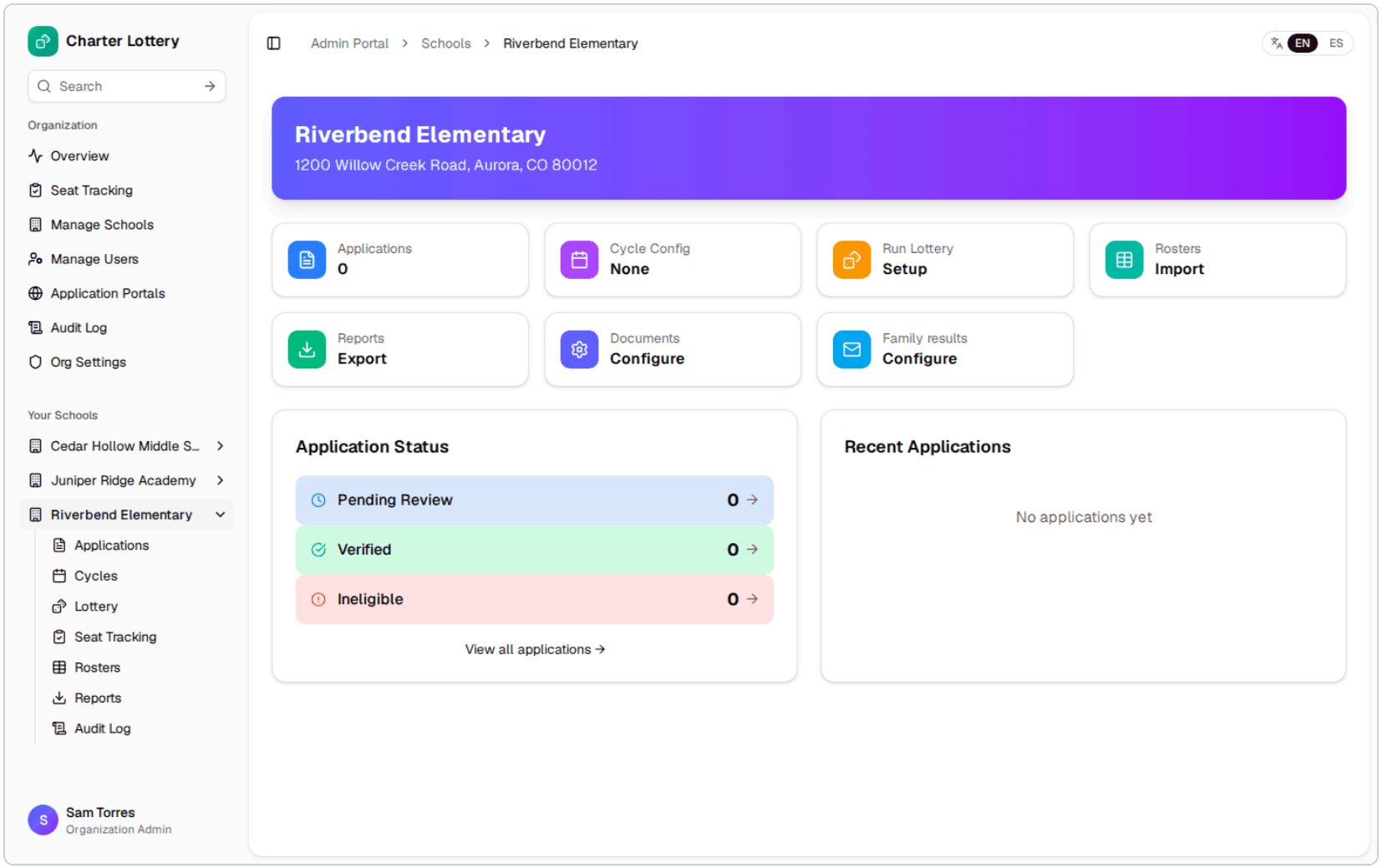
Billing and subscriptions.

PART 6

Configure each school

Step 20. Open the school dashboard

Choose a school under **Your Schools**. The dashboard links to everything for that campus.

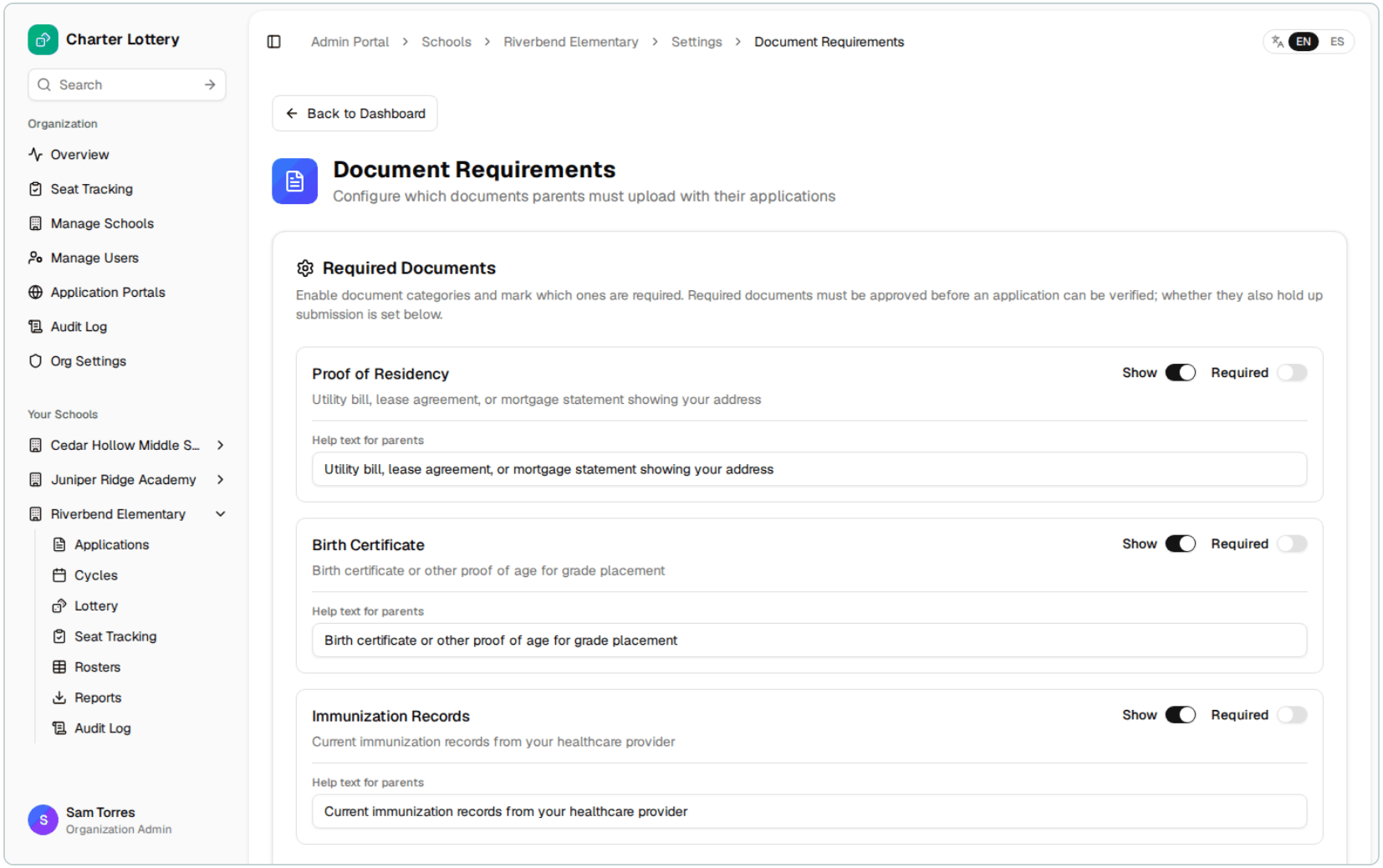


The school dashboard.

Step 21. Choose documents

Under **Documents → Configure**, choose what families can upload and what is required. A required document must be approved before an

application can be verified.

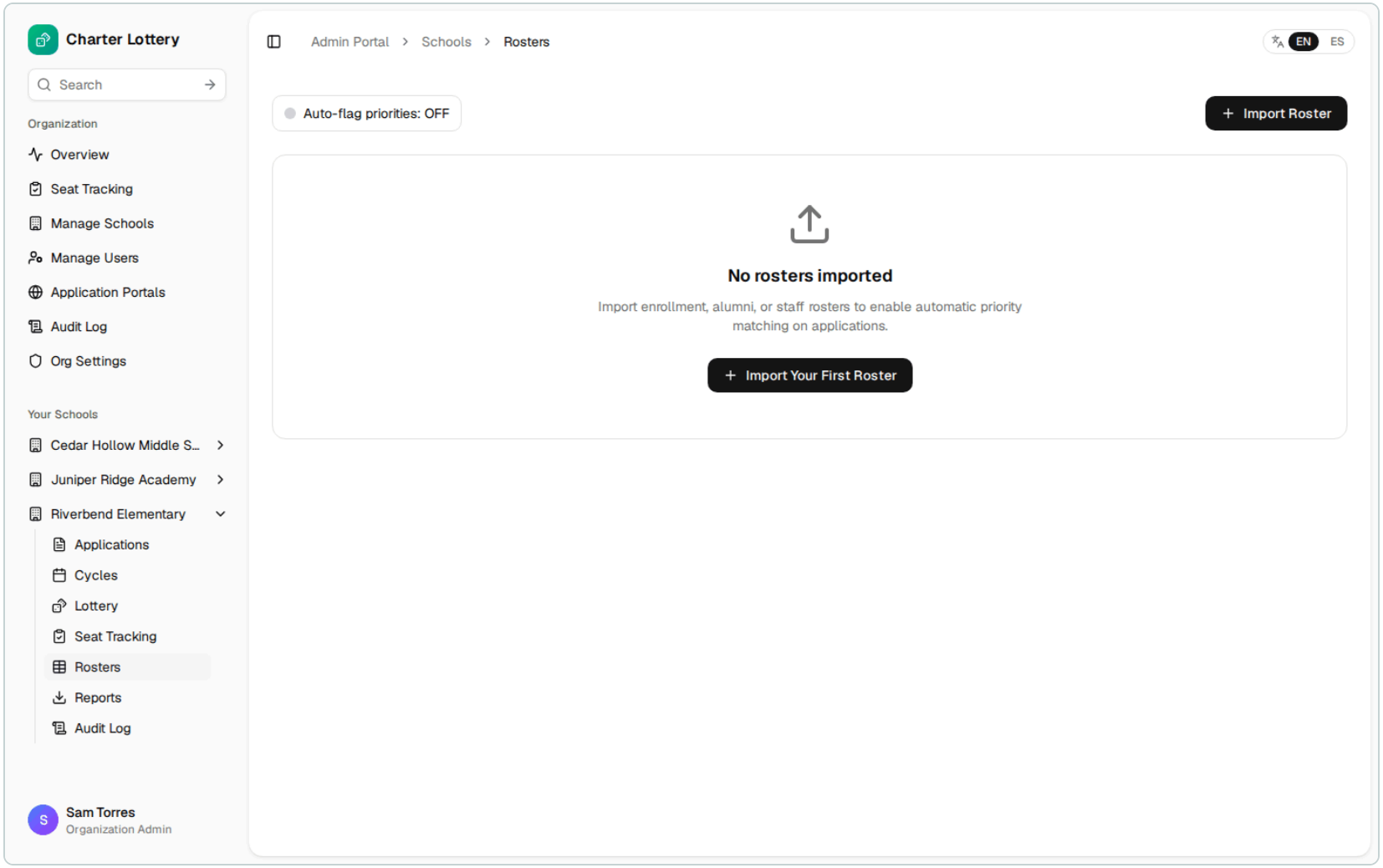


Document requirements.

Step 22. Import rosters (optional)

Rosters let Charter Lottery spot siblings of current students, staff children and alumni children. **Import Roster** takes a CSV or Excel file and lets

you match its columns.



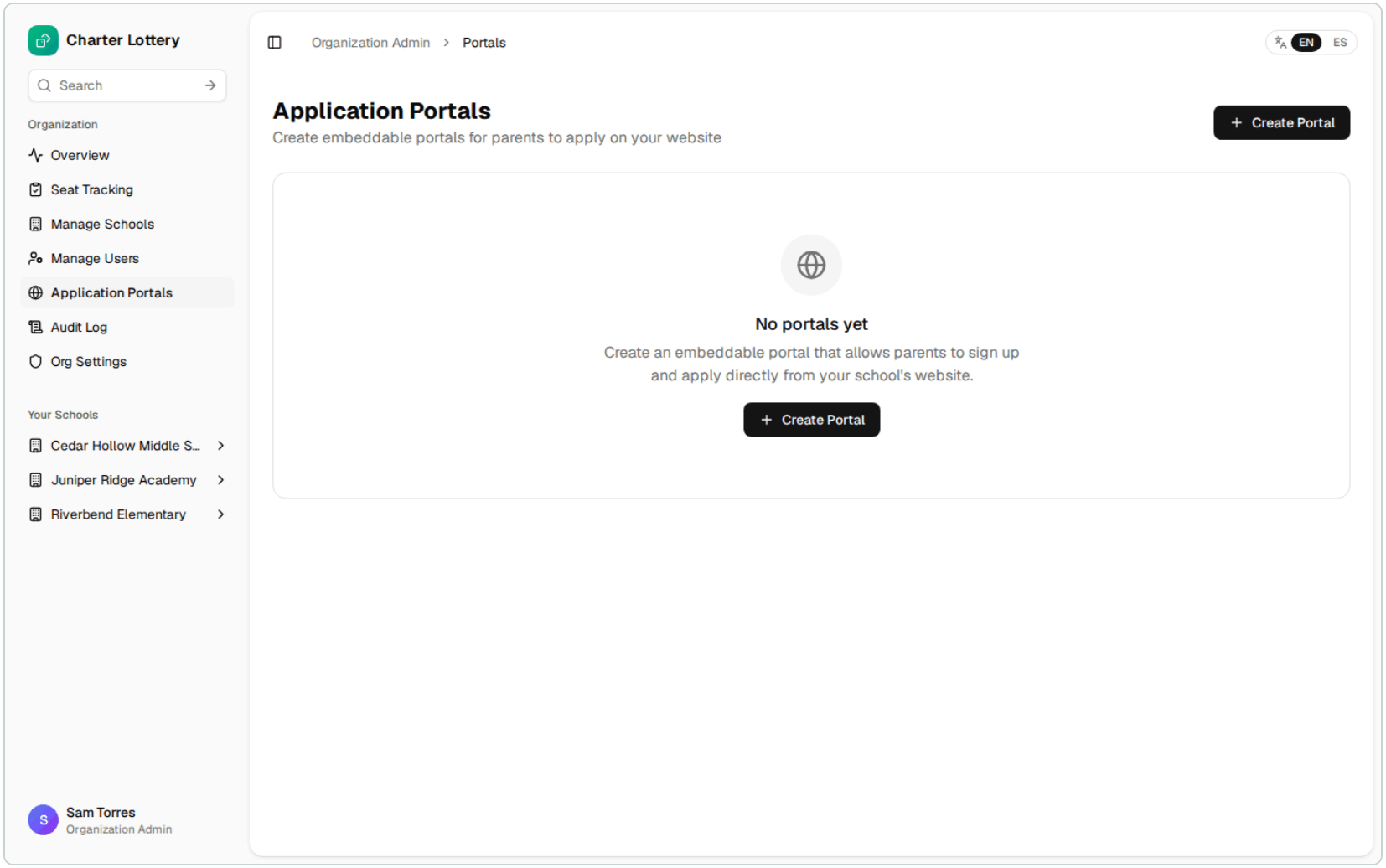
The rosters page.

PART 7

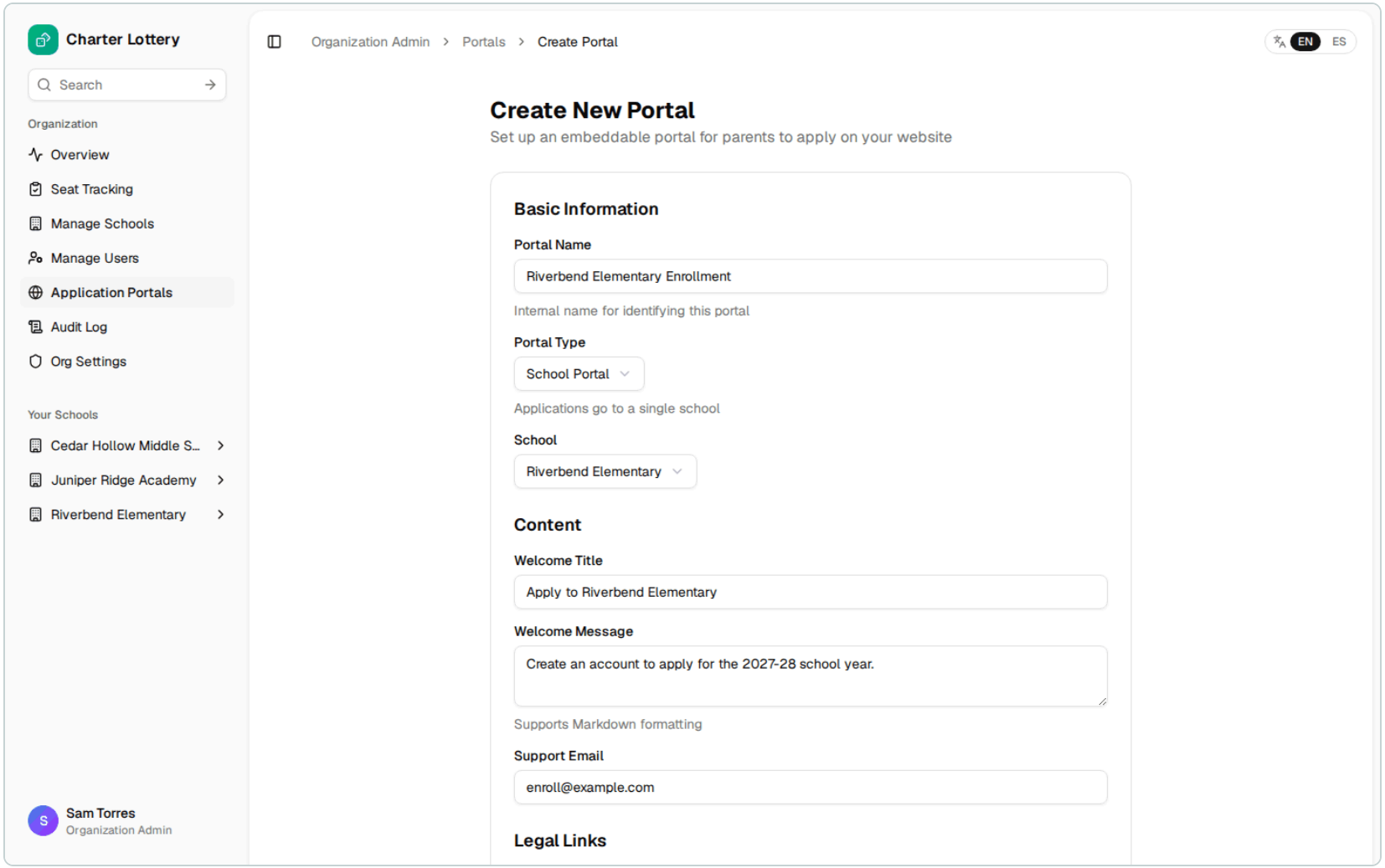
Publish the parent portal

Step 23. Create the portal

Choose **Application Portals**, then **Create Portal**. Use a School Portal for one campus or an Organization Portal to cover every school. Add a welcome message and a support email.



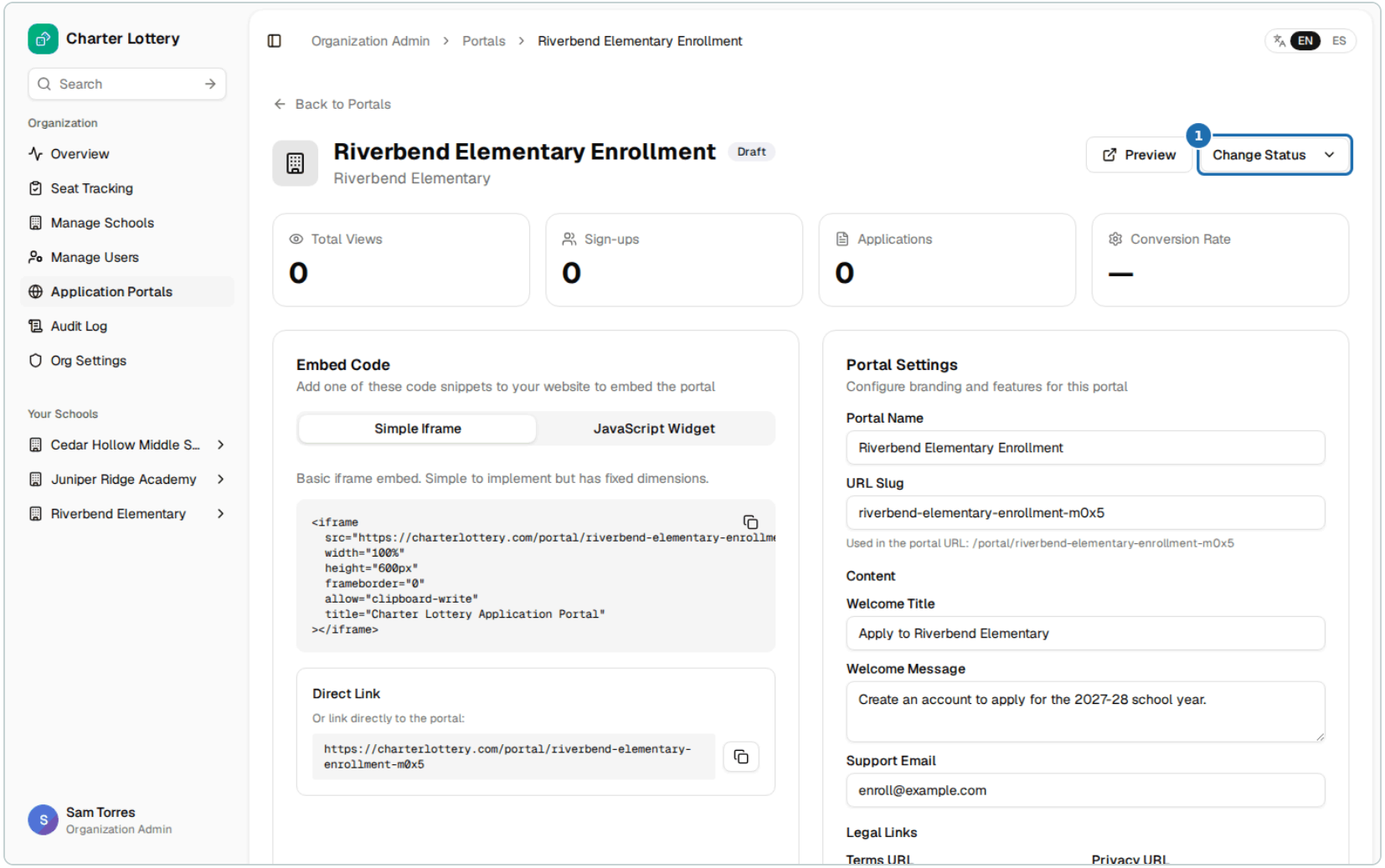
No portals yet.



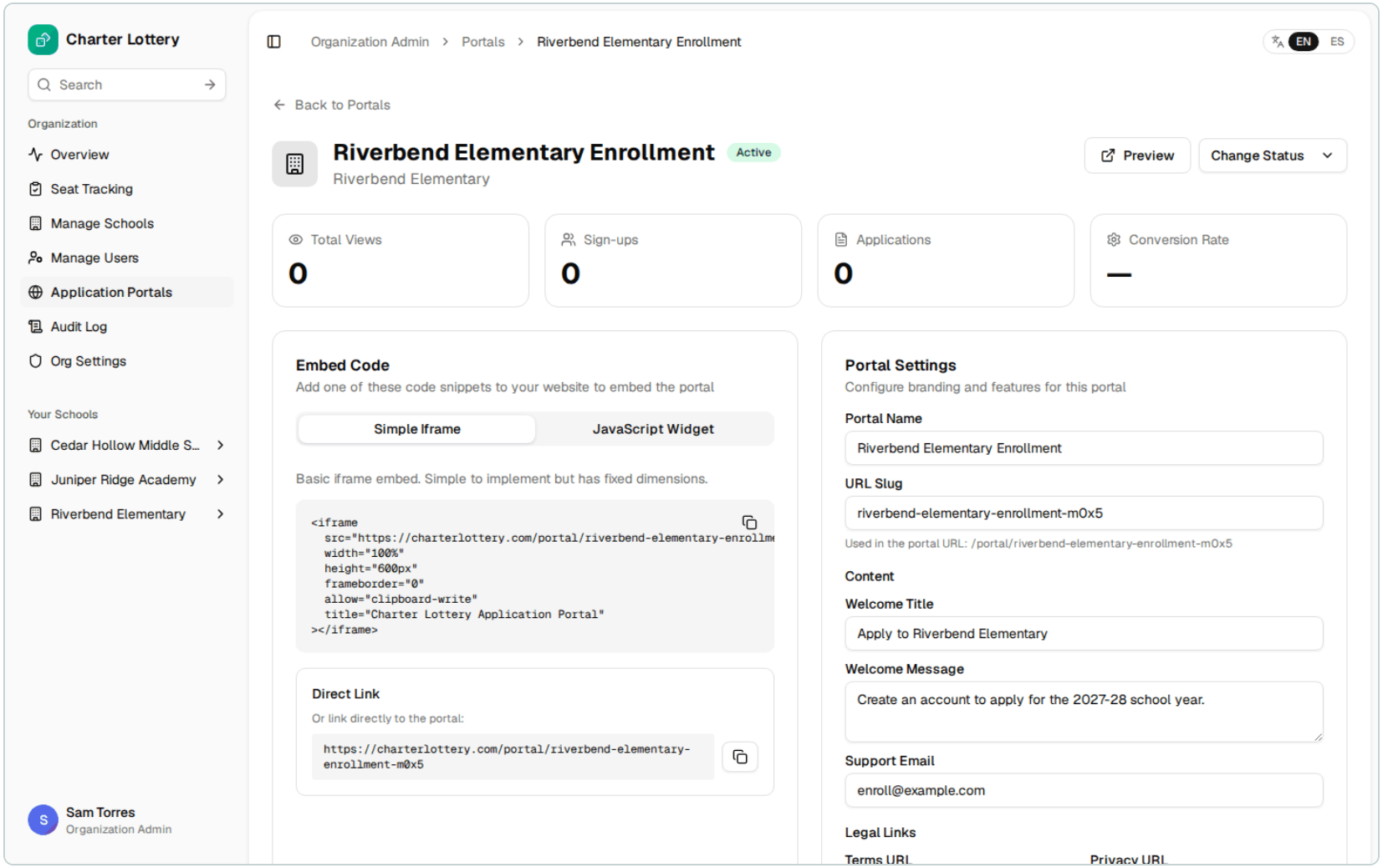
Creating a school portal.

Step 24. Activate it

New portals start as **Draft** and families cannot see them. Select **Change Status**, then **Activate**.



A draft portal. Change Status is marked 1.

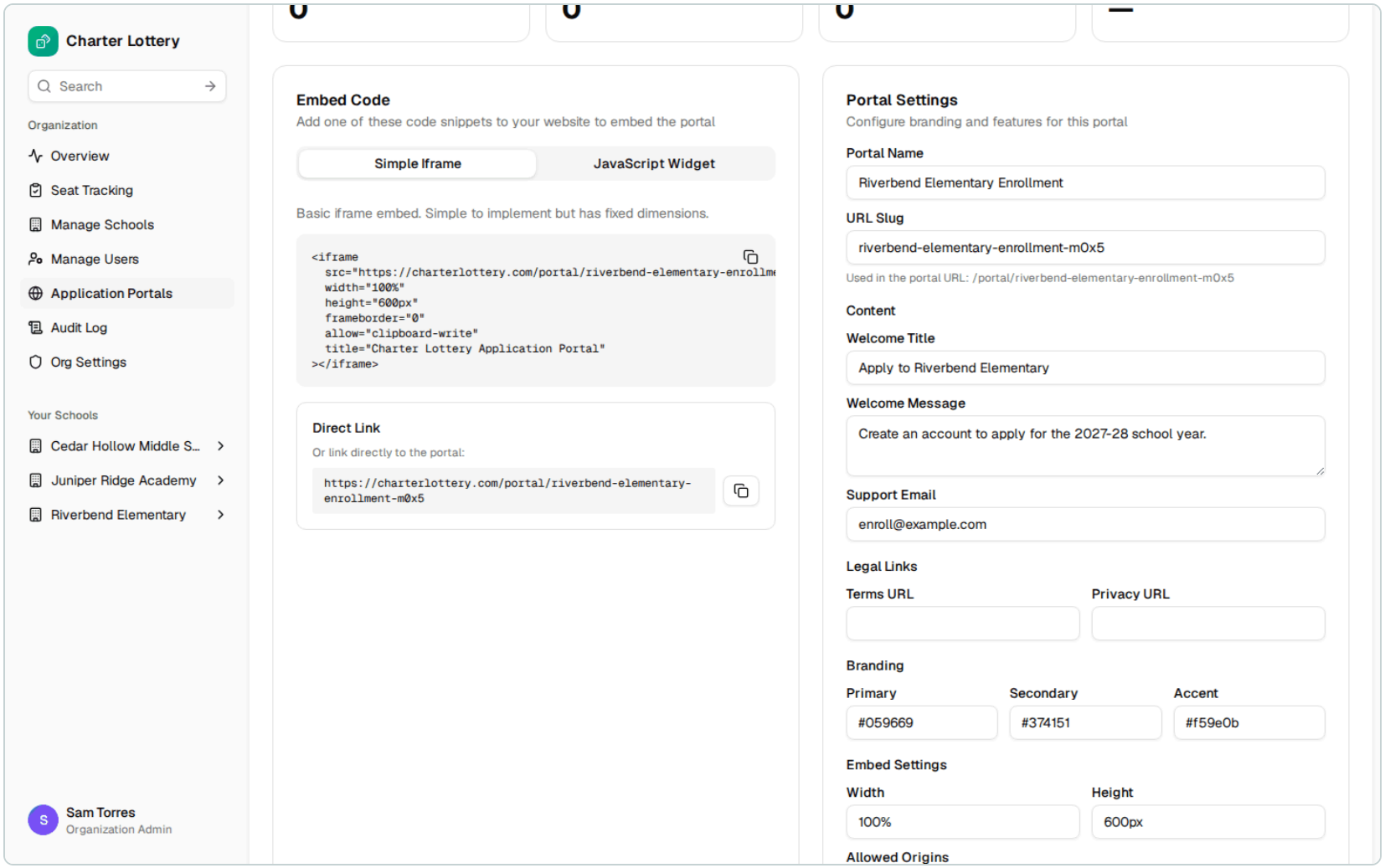


The portal is now Active.

Step 25. Link it from the school website

Use the **Direct Link** on a button such as "Apply for enrollment". It works everywhere and is best on phones.

An iframe also works. Create Account and Sign In open in a new tab, because browsers block sign-in inside another site's frame. If the school site sets a Content-Security-Policy with `frame-src`, add `https://charterlottery.com`.



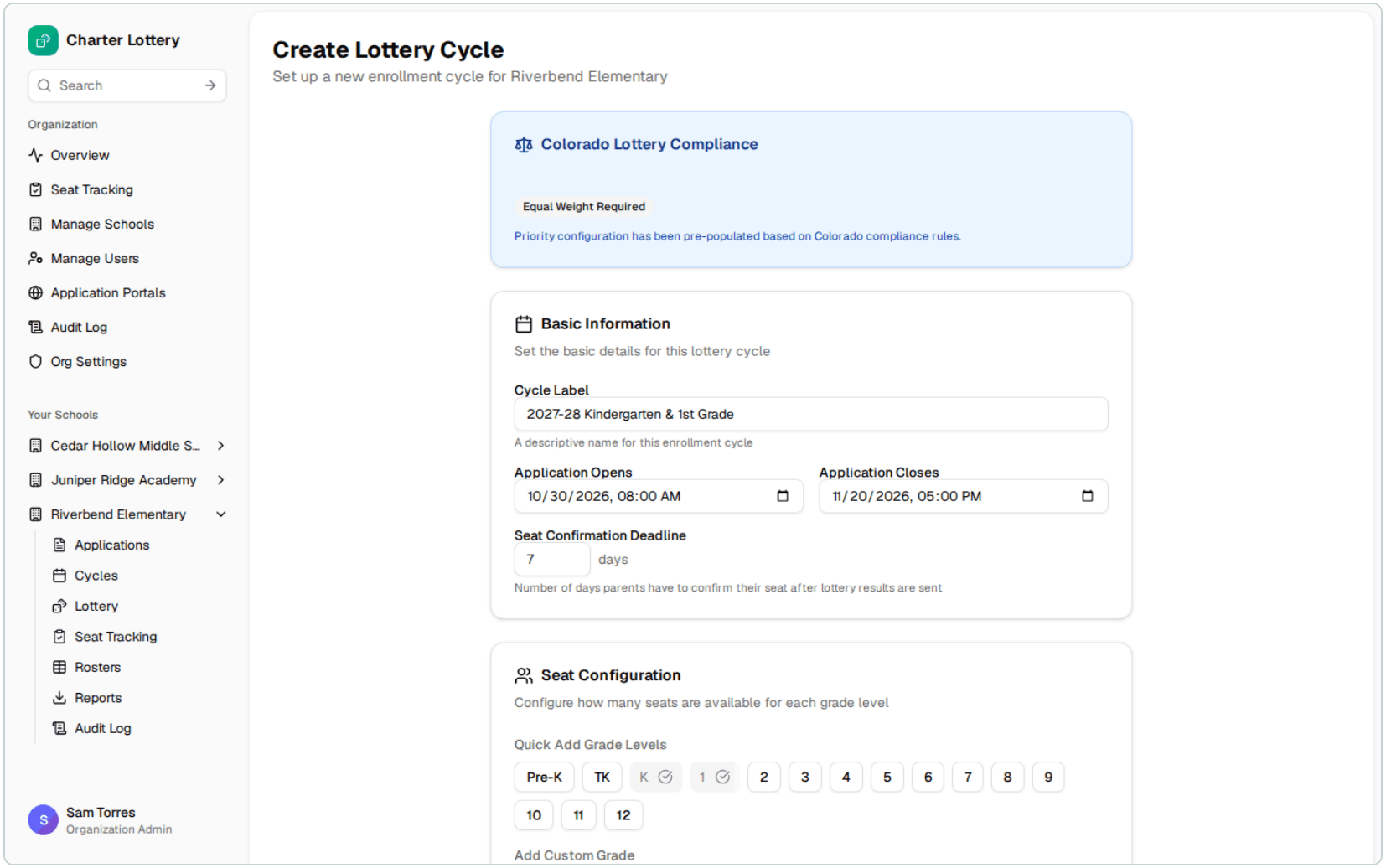
Embed code and direct link.

PART 8

Open the first cycle

Step 26. Create the cycle

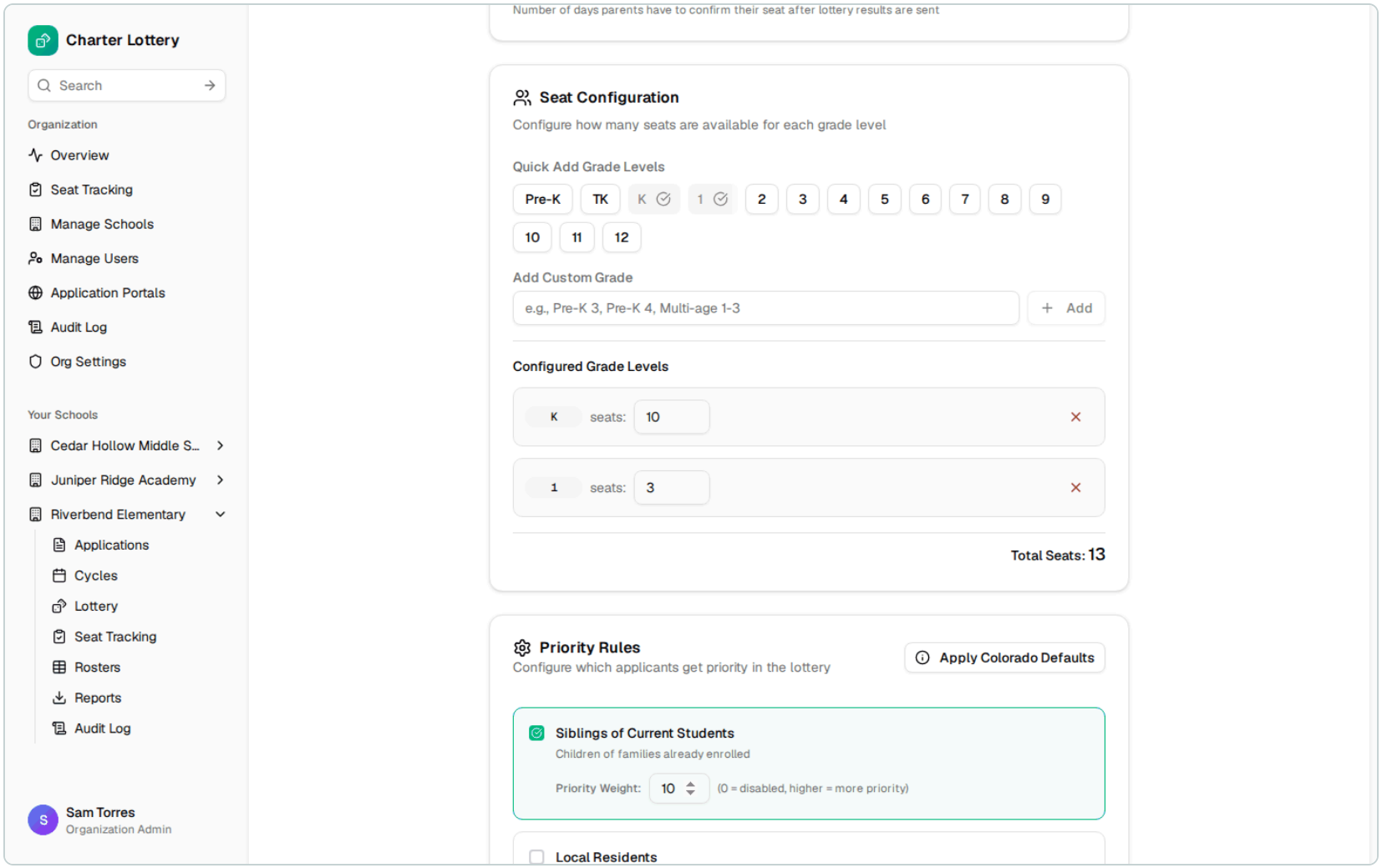
From the school, choose **Cycles → New Cycle**. Enter the label, dates and the days families have to accept a seat. The box at the top checks your choices against the school state's lottery rules.



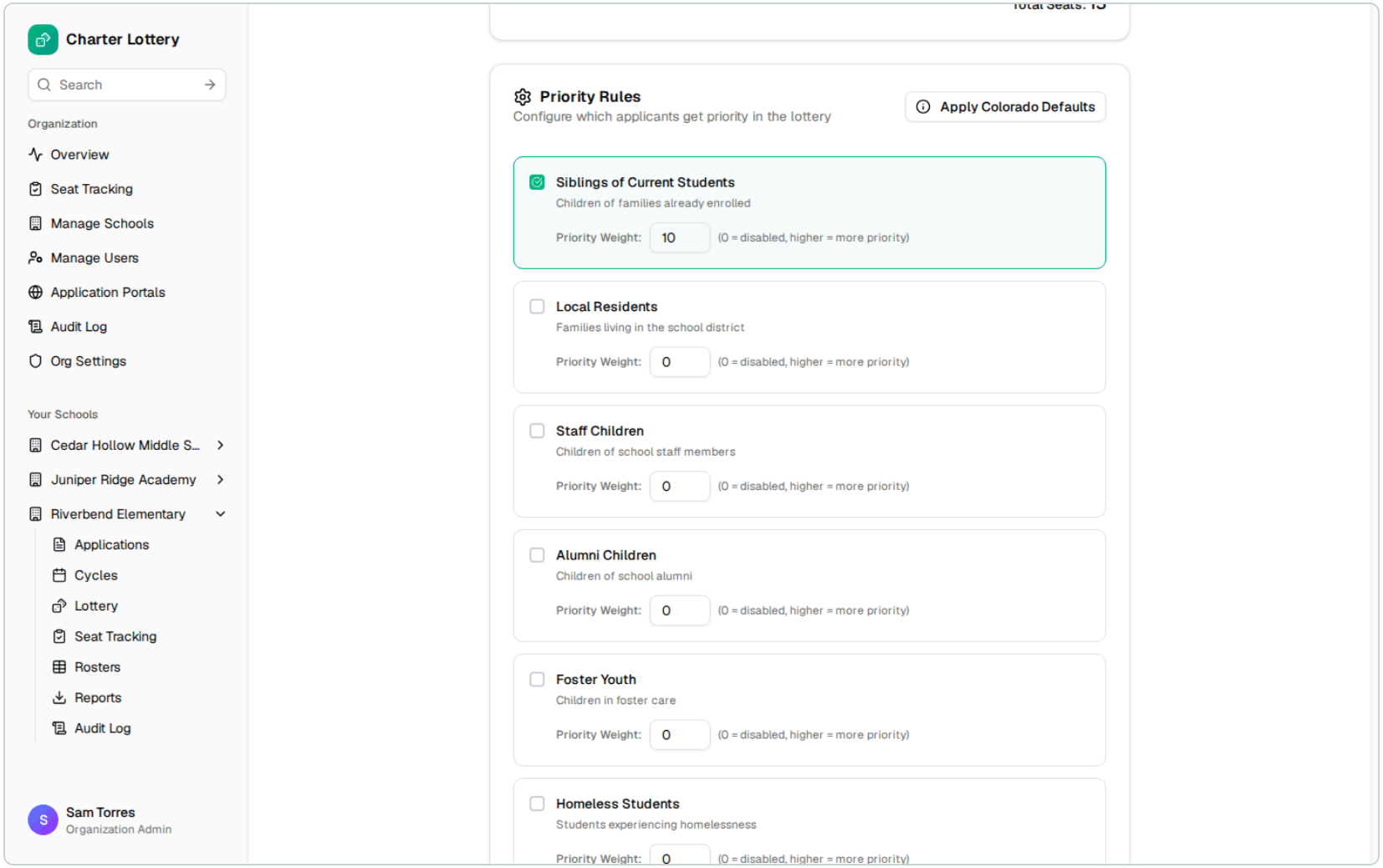
Cycle basics, with the state rule check.

Step 27. Set seats and priorities

Select each grade and enter its seats. Give a weight to each priority the school uses, and 0 turns one off.



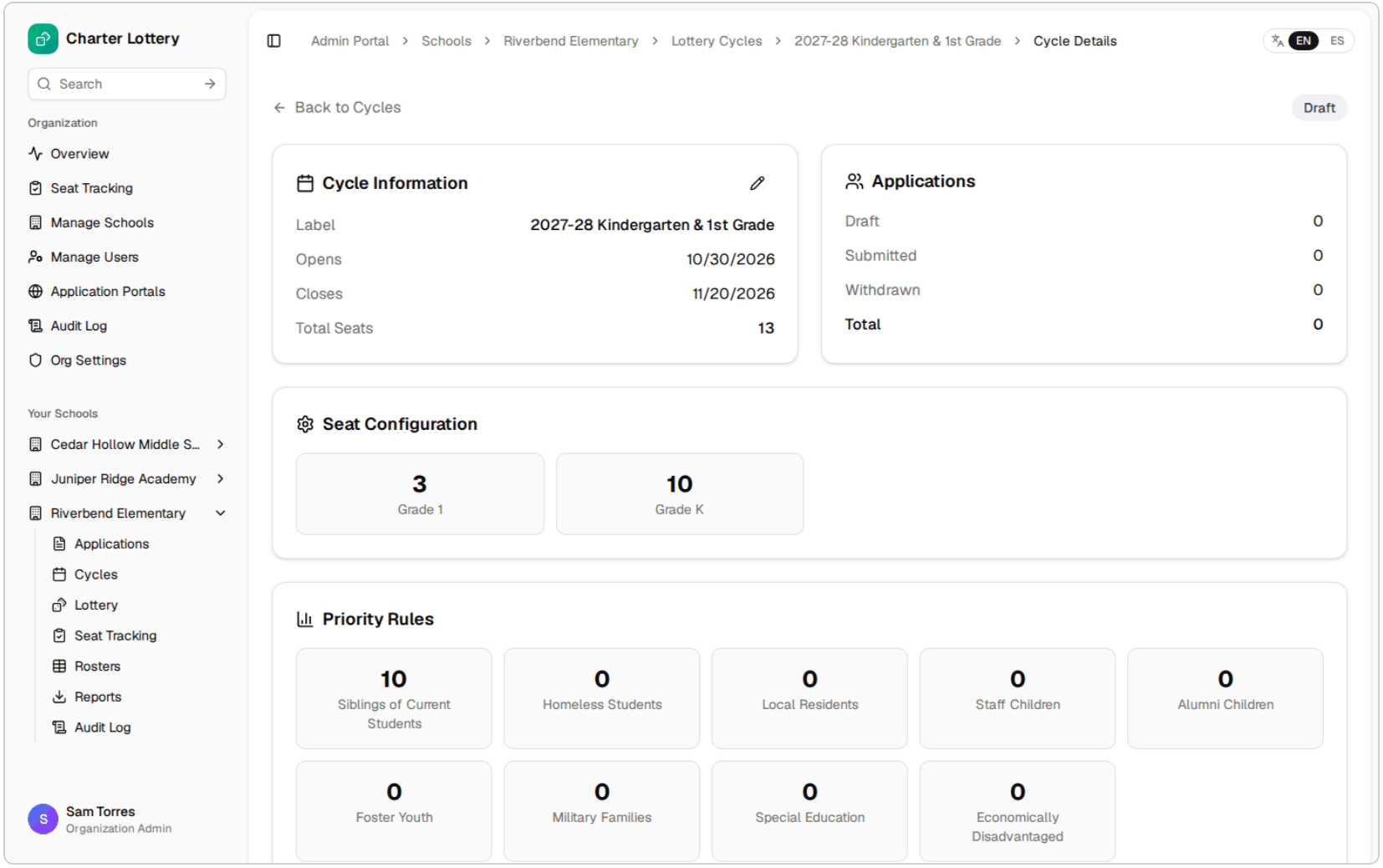
Seats by grade.



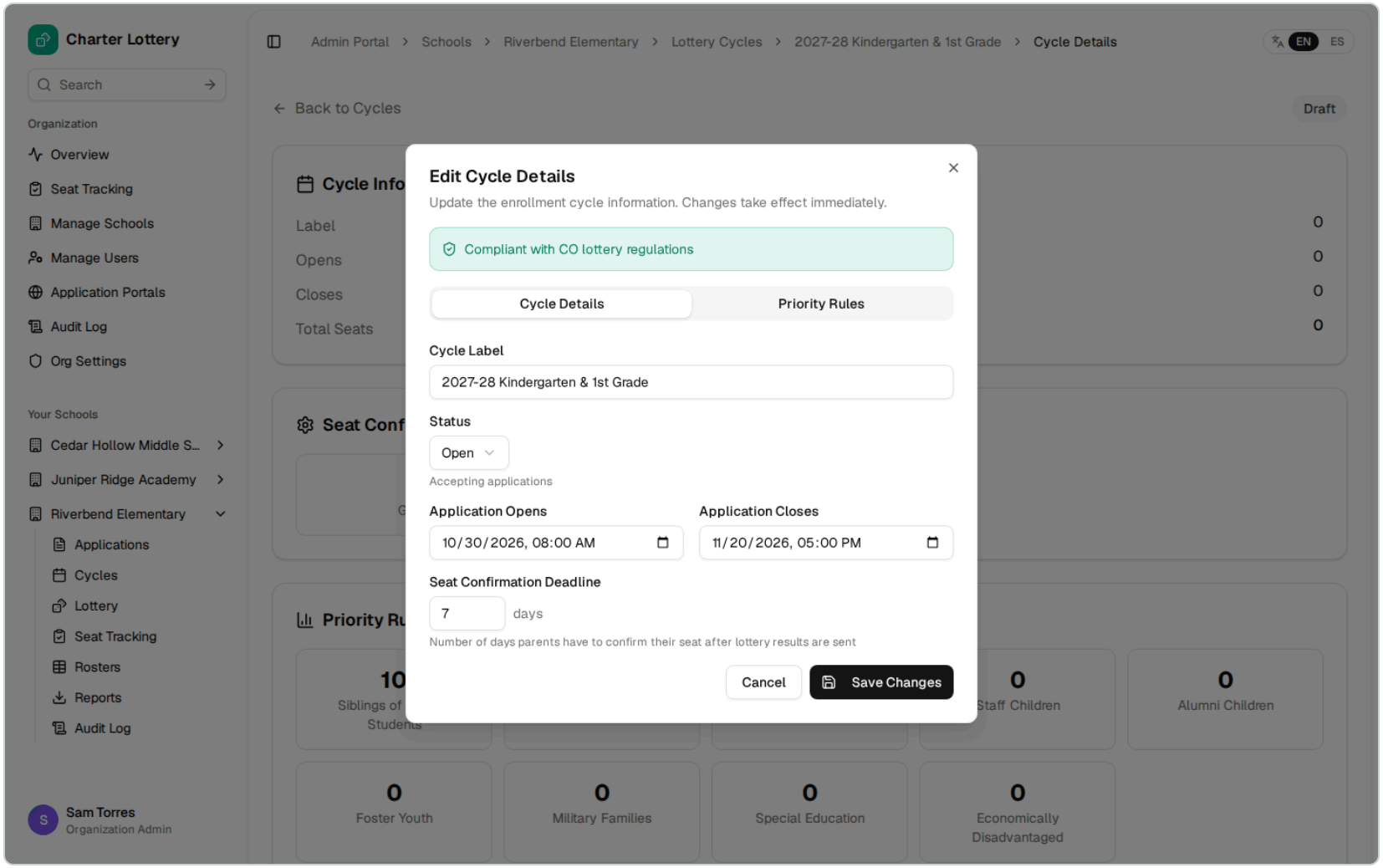
Priority rules.

Step 28. Open applications

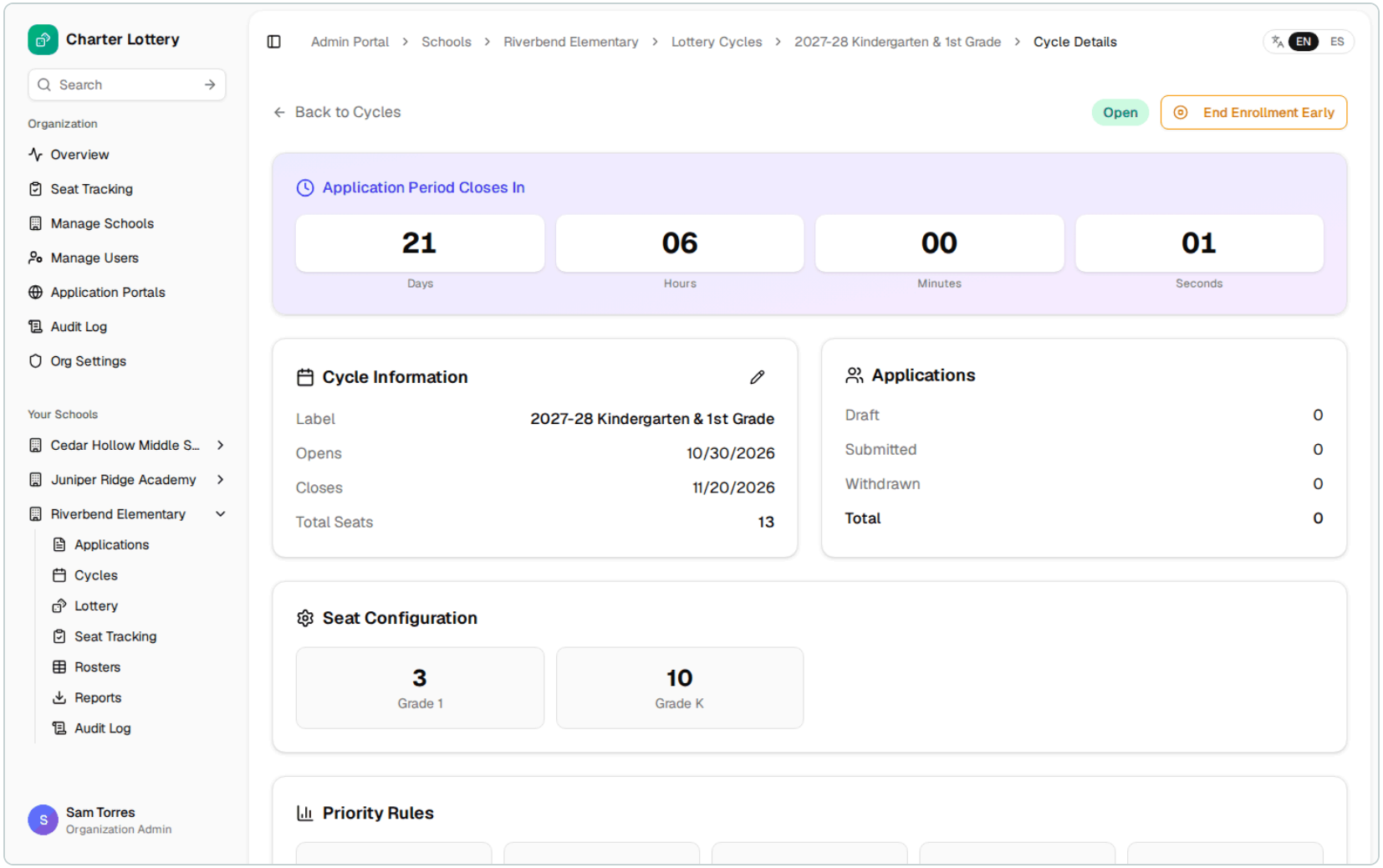
A new cycle is a **Draft**. It opens overnight once its open date has passed. To open it now, select the pencil, set **Status** to **Open** and save.



The cycle in Draft.



Changing the status to Open.



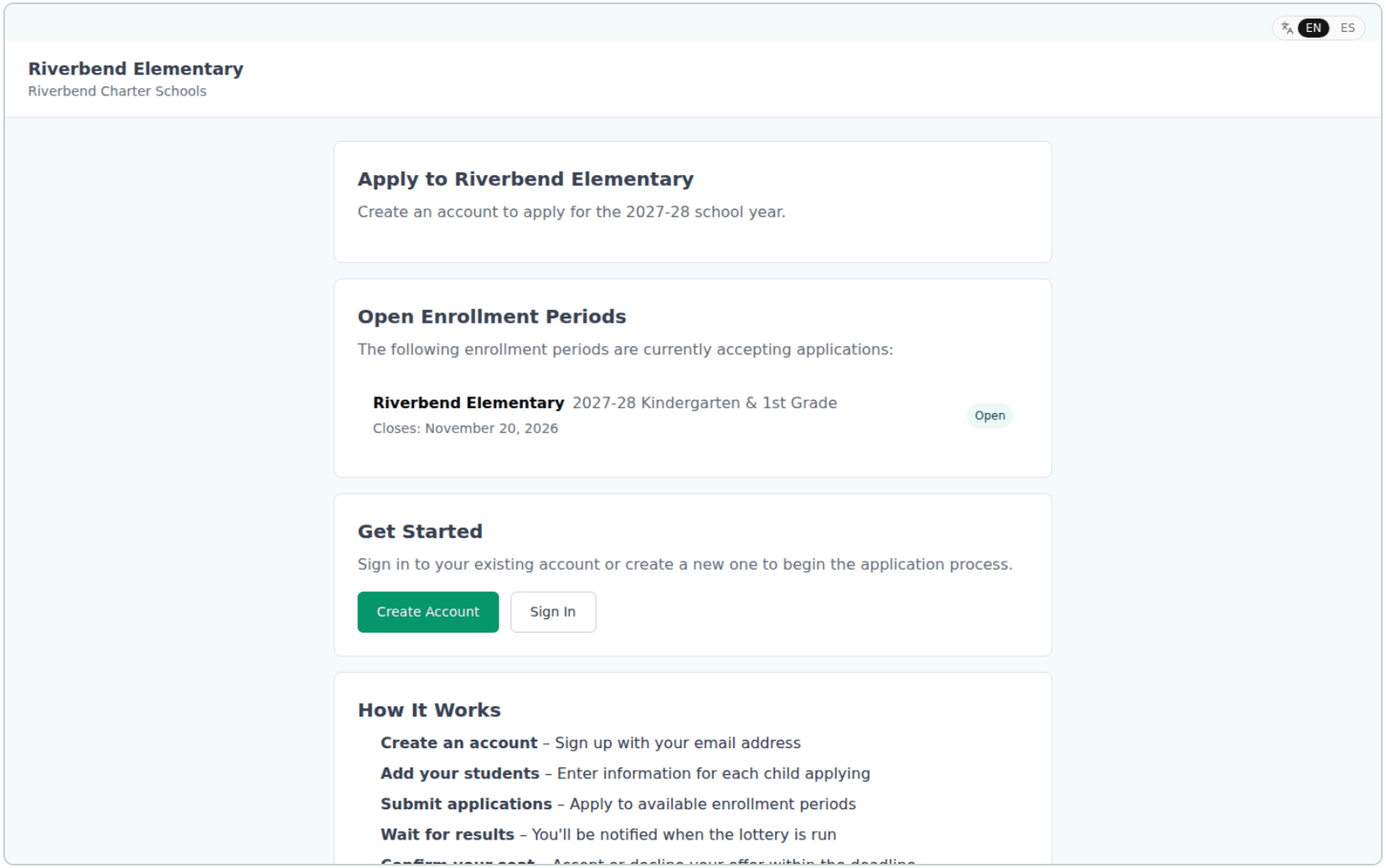
Open, with the countdown to closing.

PART 9

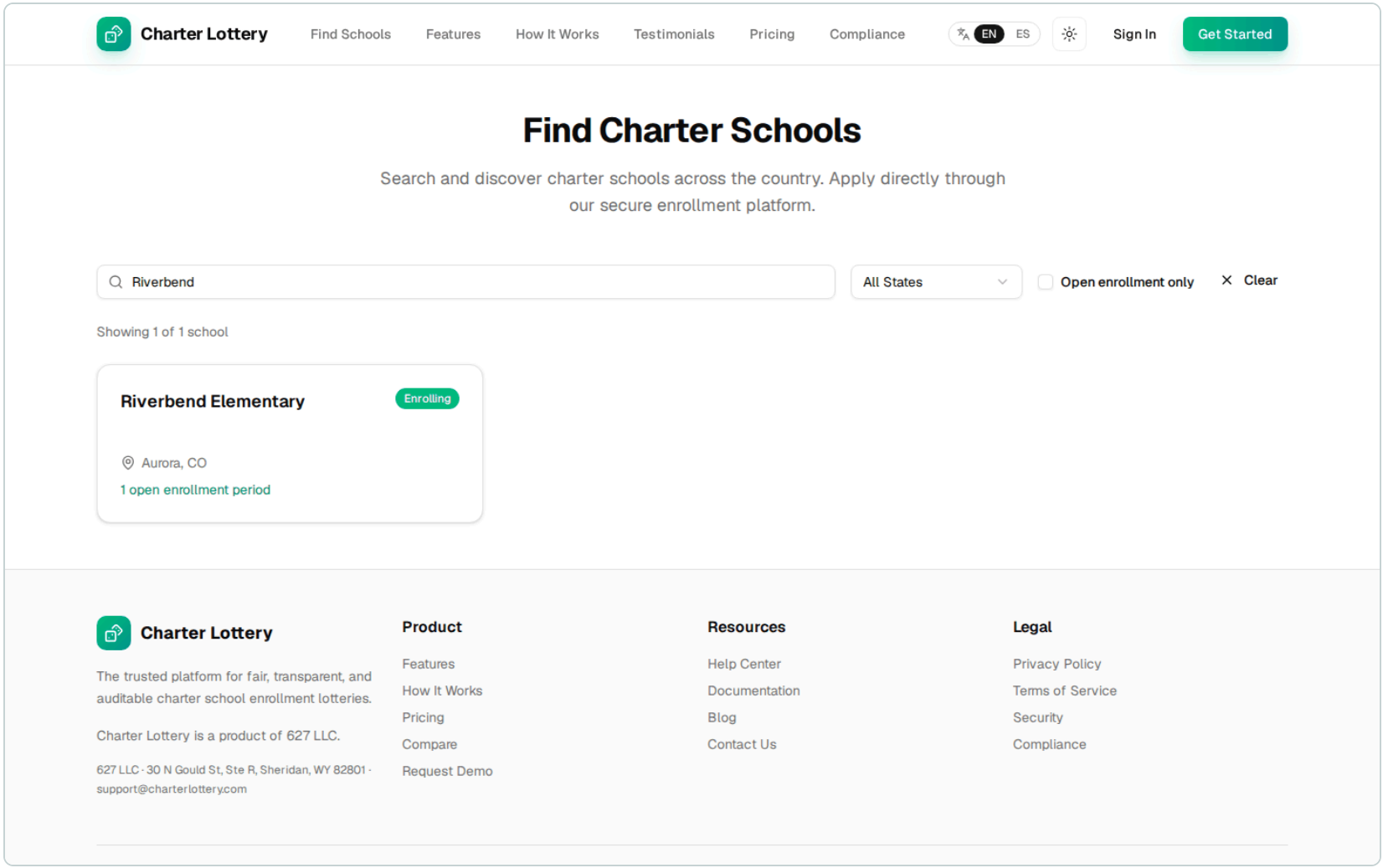
Confirm it works

Step 29. Check what families see

Open the portal link in a private window. The open cycle appears, with Create Account and Sign In. The school also appears on the public **Find Schools** page while a cycle is open. That page shows only name, city and state.



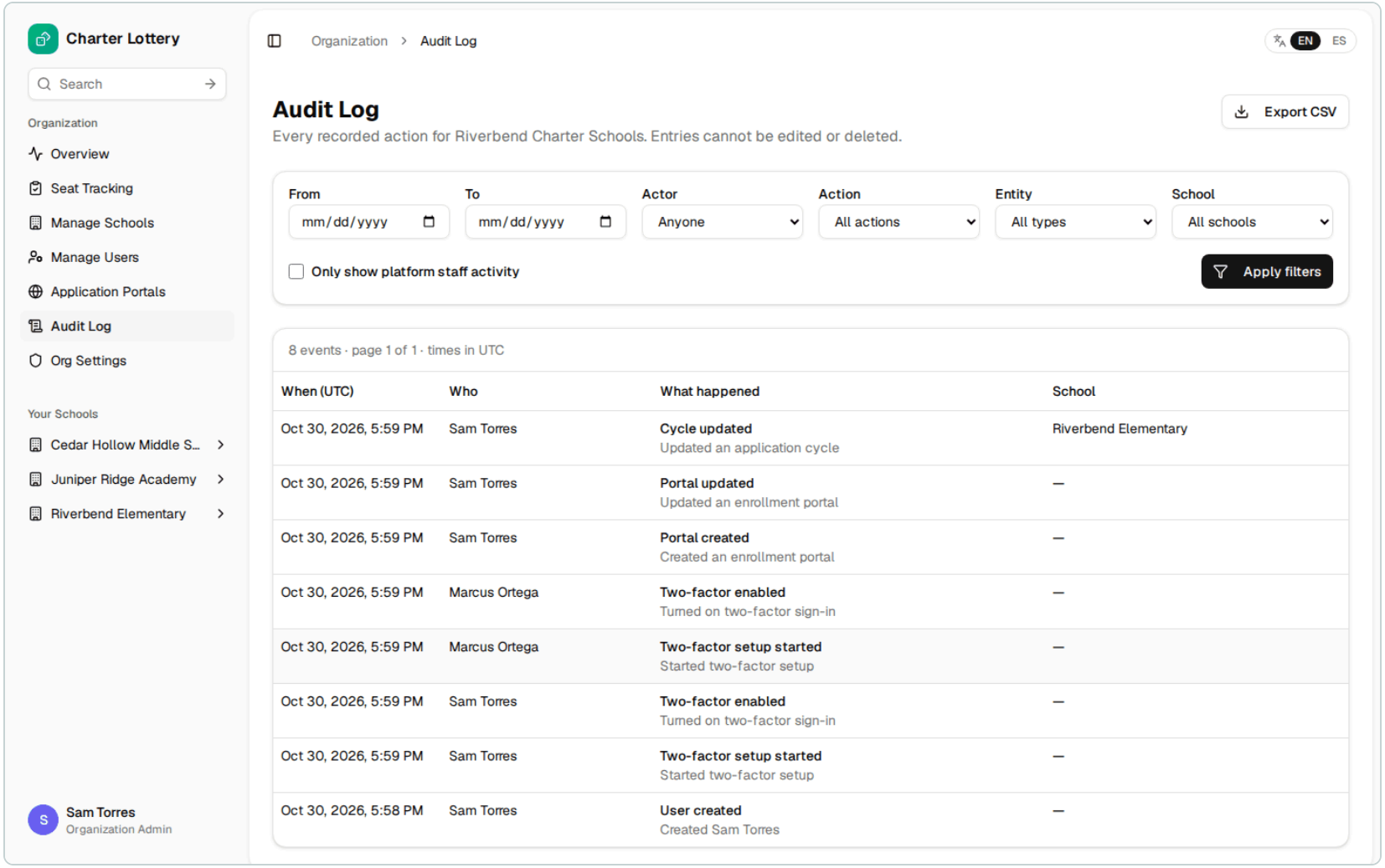
The public portal.



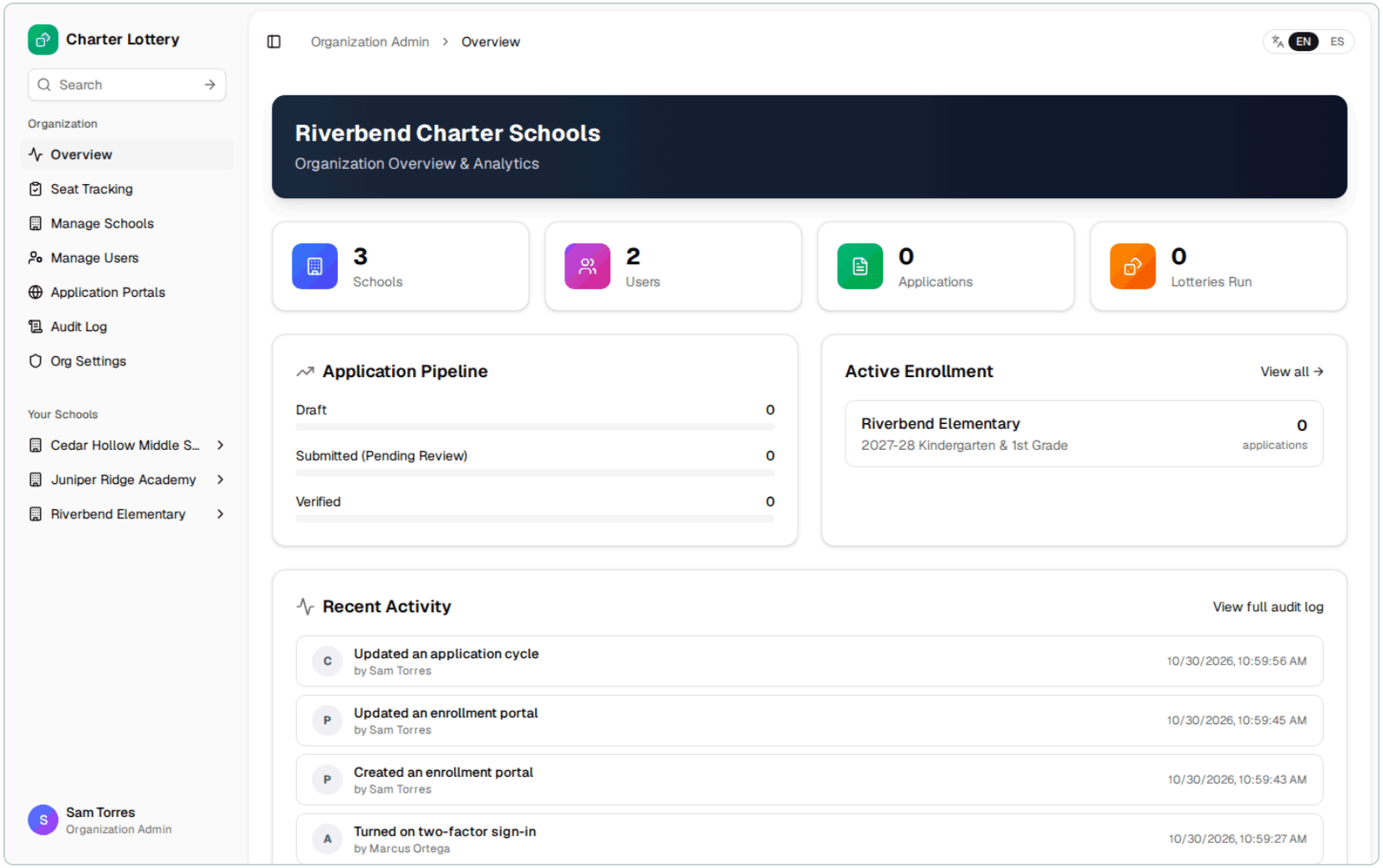
The school in Find Schools.

Step 30. Check the record

The **Audit Log** records who did what, and entries cannot be edited or deleted. **Overview** now shows the network with enrollment active.



The organization audit log.



Overview with enrollment open.

Allowlist

Item	Value
Application email	`noreply@charterlottery.com`
Reply-to, sign-up and password-reset codes	`support@charterlottery.com`
Sending service	`Amazon SES, us-east-2, DKIM-signed for charterlottery.com`
Bounce domain	`mail.charterlottery.com`
Google sign-in page	`charterlottery.auth.us-east-2.amazoncognito.com`
Text messages	`+1 844 586 1238 (US toll-free)`
Web application	`https://charterlottery.com`

Go-live checklist

- [ ] Every Organization Admin has two-step sign-in or a Google Workspace login with 2-Step Verification enforced
- [ ] Recovery codes are in the password manager
- [ ] A test email reached a staff inbox and a family-style personal inbox
- [ ] Every school has the right time zone and document requirements
- [ ] Each portal is Active and linked from the school website
- [ ] The open cycle appears on the portal in a private window

Support

Help: support@charterlottery.com. Security reports: security@charterlottery.com. Privacy and the data processing addendum: legal@charterlottery.com. Charter Lottery does not publish support hours or a response time. Optional setup and training is $175 per hour, agreed in advance.