

CYPRESS COMMAND · OTB

COMPLETE PROGRAM DOCUMENTATION · SEPTEMBER 2026

SHEET M-0 · 101-149 ARNOULD BLVD · LAFAYETTE, LA

One document, every part of the program:

- BOOK I — OPERATING MANUAL
- BOOK II — PROPERTY ONBOARDING

BOOK I — OPERATING MANUAL

Cypress Command Platform — Operating Manual (On The Boulevard deployment)

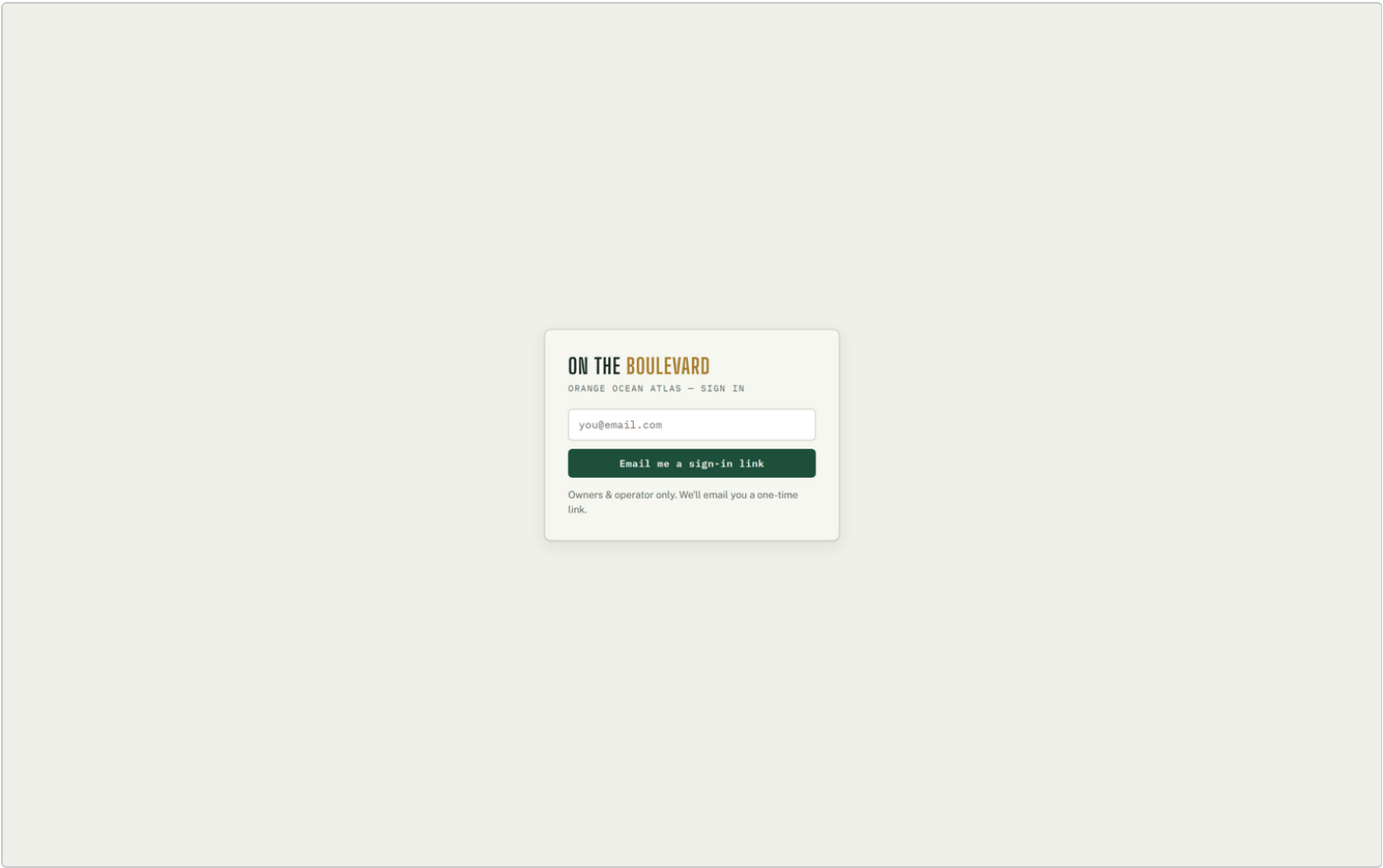
Version September 22, 2026 · covers the 18-sheet production build (777 tests) Live app:

<https://otb.cypresscommand.com> (also orangeoceanatlas.com · otb-command.vercel.app) · Operator: adam@adamabdalla.com

This supersedes the July 2026 text-only edition (`docs/pitch/operator-manual.md`). Every screenshot is a real capture of the running system. **Tenant names and dollar figures shown are representative sample data, not actual tenancy or economics.** Part I is orientation, Part II is the operator's day, Part III covers each sheet in depth, Part IV is the counterparty guides (owner / vendor / tenant / signer), Part V is the monthly and periodic rhythms, Part VI is administration and recovery.

Part I — Orientation

1.1 Signing in



There are no passwords. Enter your email on the login screen; a **magic link** arrives by email; clicking it signs you in. Your role is resolved automatically:

YOU ARE...	HOW THE SYSTEM KNOWS	YOU LAND ON
Operator	adam@adamabdalla.com	Everything
Owner	pre-authorized email (see §6.1)	Read-only, operator-chosen sheets
Vendor	email matches the vendor roster	V-1 Vendor Portal only
Tenant	email in the tenant-contacts list	M-1 Maintenance only, own unit
Anyone else	—	A "pending" holding screen; no data

If a legitimate person lands in pending, the operator promotes them (§6.1).

1.2 The drawing-set metaphor

The left sidebar is a **sheet index**, like an architect's drawing set:

- **D-0 Portfolio** — cross-property rollup (one card per property)
- **D-1 Dashboard** — KPIs, action queue, live cards
- **A-1 Site Plan** — the interactive plat
- **A-2 Spatial** — the property workspace (plat model, suite inspector, evidence) + capture lenses
- **R-1 Rent Roll** · **C-1 Compliance** · **P-1 Financial** — money and obligations
- **S-1 Owner Safe** — sealed document vault + property records
- **AI-1 Concierge** — the three AI personas
- **T-1 Critical Dates** · **W-1 Action Board** — what is due, who is doing it
- **K-1 Directory** — contacts, document register, pylon sign, site imagery
- **B-1 Marketing** — flyers, overview, tenant cards, photo library, tour media
- **L-1 Comm Log** — every letter, e-mail, meeting note and phone call
- **N-1 Matters** — long-running affairs with deadlines and correspondence
- **M-1 Maintenance** — work orders (also the tenant's sheet)
- **O-1 Operations** — the procedures (SOP) library
- **V-1 Vendor Portal** — vendor roster, COIs, work orders

The masthead carries a **KPI ribbon** — Occupancy · Rent/mo · Vacant · Expiring ≤12 mo · Needs attention — and each figure is a button that drills into its sheet.

The URL tracks the open sheet (`#roll` , `#plan` ...) — the back button walks your history, and links can deep-link a sheet. Boot lands on D-1 (D-0 sits above it in drawing-set order but is a rollup, not the daily surface).

1.3 The unit drawer — the universal detail surface

ON THE BOULEVARD

101-149 ARNOULD BLVD • LAFAYETTE, LA 70506 • BELLE REALTY OF LAFAYETTE, LLC

Search units, contacts, docs... (/)

1 SHEET

EXPORT JSON

IMPORT JSON

62,883 SF GLA • 27 UNITS • 324 STALLS (legal)

ISSUE AUG 10, 2026

SHEET INDEX

D-0 Portfolio

D-1 Dashboard

A-1 Site Plan

A-2 Spatial

R-1 Rent Roll

C-1 Compliance

P-1 Financial

S-1 Owner Safe

AI-1 Concierge

T-1 Critical Dates

W-1 Action Board

K-1 Directory

M-1 Maintenance

V-1 Vendor Portal

Preview owner view

Owners can see...

Dark mode

ZONING CH - Commercial Heavy VARIANCE Entry 99-11797 324 legal / 344 required • 314 dram GLA 62,883 headline • 62,010 devised REMOTE LOT Marie Antoinette St

UNIT	TENANT	SF	BASE	CAM	TAX	INS	TOTAL
101	Coastal Threads Coastal Threads, LLC	6,877	15.50	2.00	0.75	1.00	19.25
103	Coastal Threads Coastal Threads, LLC	3,054	15.50	2.00	0.75	1.00	19.25
105	Bayou Art Supply Bayou Art Supply, LLC	2,222	16.75	2.00	0.75	1.00	20.50
107	Sweet Pecan Bakery Sweet Pecan Bakery, LLC	1,743	17.50	2.00	0.75	1.00	21.25
109	Juniper & Jade Juniper & Jade, LLC	2,546	16.75	2.00	0.75	1.00	20.50
111	Stitch Haus Sewing Stitch Haus Sewing, LLC	1,690	17.50	2.00	0.75	1.00	21.25
113	Harvest Table Kitchen Harvest Table Kitchen, LLC	2,606	16.75	2.00	0.75	1.00	20.50
115	Second Story Clothing Second Story Clothing, LLC	2,170	16.75	2.00	0.75	1.00	20.50
117	Second Story Clothing Second Story Clothing, LLC	2,170	16.75	2.00	0.75	1.00	20.50
117.5	Lakeside Nail Studio Lakeside Nail Studio, LLC	1,769	17.50	2.00	0.75	1.00	21.25
119	Pelican Finance Co. Pelican Finance, LLC	1,982	17.50	2.00	0.75	1.00	21.25
119.5	Oak Grove Veterinary Oak Grove Veterinary, LLC	1,974	17.50	2.00	0.75	1.00	21.25
121	Camellia Salon Camellia Salon, LLC	1,709	17.50	2.00	0.75	1.00	21.25
123	Magnolia Formalwear Magnolia Formalwear, LLC	3,563	15.50	2.00	0.75	1.00	19.25
125	Willow Shoe Studio Willow Shoe Studio, LLC	1,735	17.50	2.00	0.75	1.00	21.25
127	Willow Shoe Studio Willow Shoe Studio, LLC	2,538	16.75	2.00	0.75	1.00	20.50
129	Ember Fitness Studio Ember Fitness Studio, LLC	1,789	17.50	2.00	0.75	1.00	21.25
131	VACANT	1,907	-	2.00	0.75	1.00	-
133	VACANT	1,272	-	2.00	0.75	1.00	-
135A	Boulevard Barber Co. Boulevard Barber, LLC	1,580	17.50	2.00	0.75	1.00	21.25
135B	Belle Realty of Lafayette Belle Realty Property Management	1,580	-	2.00	0.75	1.00	-

UNIT 101 • 6,877 SF

Coastal Threads

ACTIVE

LEGAL ENTITY Coastal Threads, LLC

USE Women's fashion boutique

BASE RENT \$15.50 PSF

TOTAL RENT \$19.25 PSF

MONTHLY \$11,031.85

TERM END Feb 28, 2027

LEASE TERM

Feb 15, 2024 282 days remaining Feb 28, 2027

HVAC RESPONSIBILITY \$ cap - leaseholder covers excess

TENANT REPAIR CAP \$1,000 / occ.

TENANT REPLACEMENT \$1,000

Tenant pays to the cap; landlord covers the excess. Quarterly PM contract with Gulf Coast Mechanical (or approved provider) required.

NOTES EDIT

Combined lease with Unit 103 — together 9,931 SF.

CONTACTS

Coastal Threads, LLC TENANT OF RECORD no phone / email on file Coastal Threads - Women's fashion boutique

+ Contact

DOCUMENTS

Executed lease LEASE Coastal Threads, LLC Term to 2027-02-28 no file linked

+ Document

Click any unit anywhere (site plan, rent roll, 3D lens, satellite) and the **drawer** opens with everything about that unit: term progress, PSF economics, HVAC responsibility, notes, contacts, documents, photos, compliance rows, the **Ledger** panel, and the **E-Sign** panel. Most day-to-day work happens here.

1.4 Search and shortcuts

- Press / anywhere → omni-search units, contacts, documents; Enter opens the top hit.
- ↓ **SHEET** (topbar) or **Ctrl+P** → prints the open sheet as a stamped PDF (drawing-set footer, date, headline figures). R-1 is guaranteed one page.
- **Export / Import** (topbar) → full state snapshot as JSON; Import restores it. This is your portable backup (\$6.4).
- Theme toggle (sidebar foot): plan-room (default) ↔ dark. Print always reverts to paper.

1.5 Phones and tablets



Search units, contacts, docs... (/)

Operations Dashboard

D-1 · LIVE FROM RENT ROLL

OCCUPANCY

94.9%

59,631 of 62,810 SF

MONTHLY RENT

\$97,609

\$1,171,302 annualized

IN HOLDOVER

0

EXPIRING ≤ 12 MO

10

101 · 103 · 107 · 111
· 113 · 115 · 117 ·
119 · 139 · 141

VACANT BAYS

0

PARKING

704

2

131 (1,907 SF) · 133
(1,272 SF)

524/344

legal (var. **99-11797**)
· 314 drawn

Lease
Runway

TERM REMAINING BY UNIT – TODAY
MARKED

115	Second ...		51d left
117	Second ...		51d left
111	Stitch ...		174d left
101	Coastal...		202d left
103	Coastal...		202d left
119	Pelican...		202d left
107	Sweet P...		233d left
139	Quick L...		263d left

SHEET INDEX

D-0 Portfolio

D-1 Dashboard

A-1 Site Plan

A-2 Spatial

R-1 Rent Roll

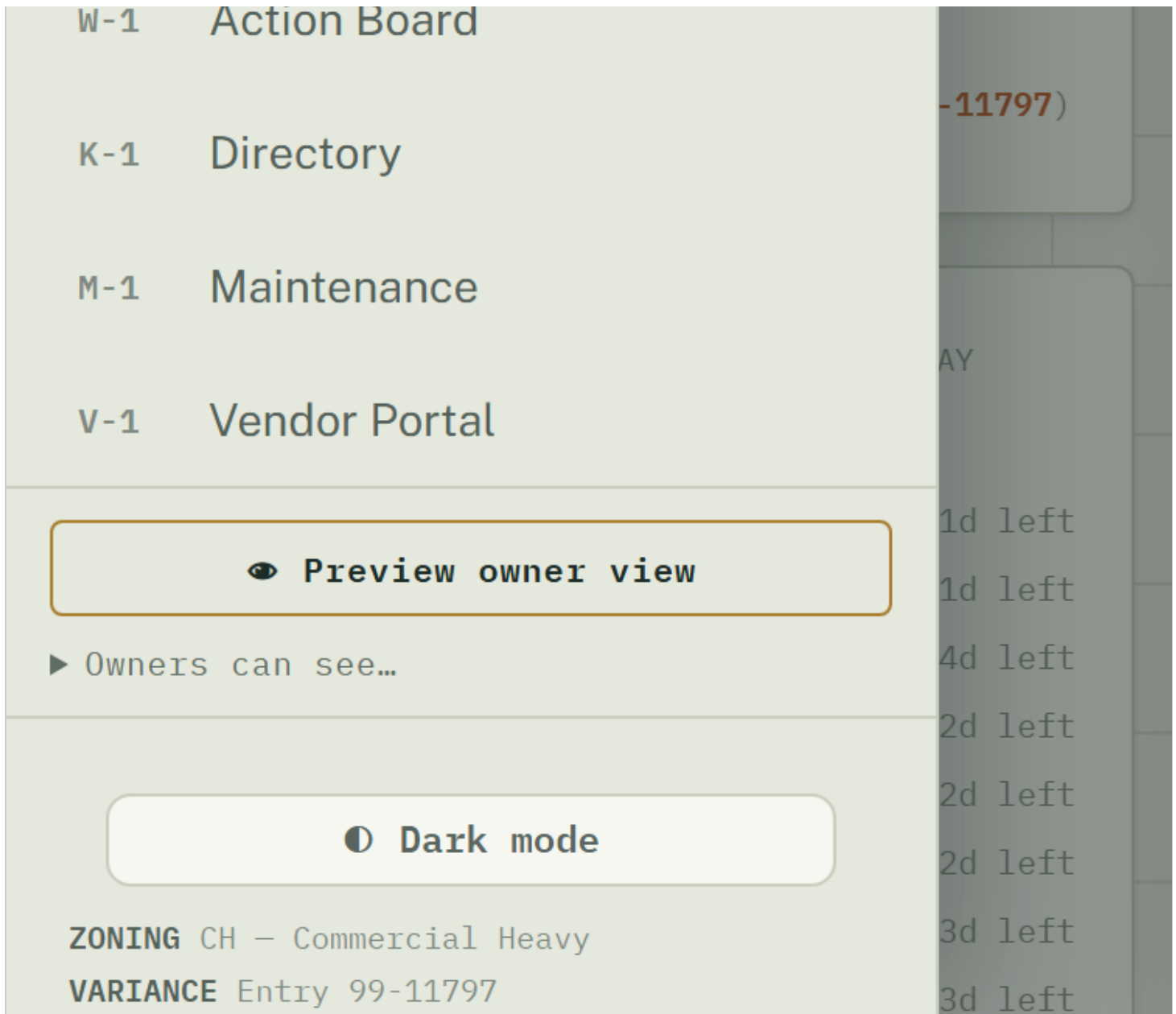
C-1 Compliance

P-1 Financial

S-1 Owner Safe

AI-1 Concierge

T-1 Critical Dates



At phone widths the sheet index becomes an off-canvas drawer behind the $\equiv$ button, grids collapse to one column, and the unit drawer goes full-screen. Everything works; nothing is mobile-only.

Part II — The operator's day

A normal day touches five surfaces:

1. **D-1 Dashboard** — scan the KPI row, the live cards, and the Action Queue (§3.2).
2. **W-1 Action Board** — the kanban seeds *itself* from live facts (holdovers, renewal windows ≤ 12 months, vacancies, compliance flags, covenant obligations, open work orders). Drag cards between lanes,

dismiss what's handled, add custom cards. You never have to remember to create a card for a lease expiring — it appears on its own.

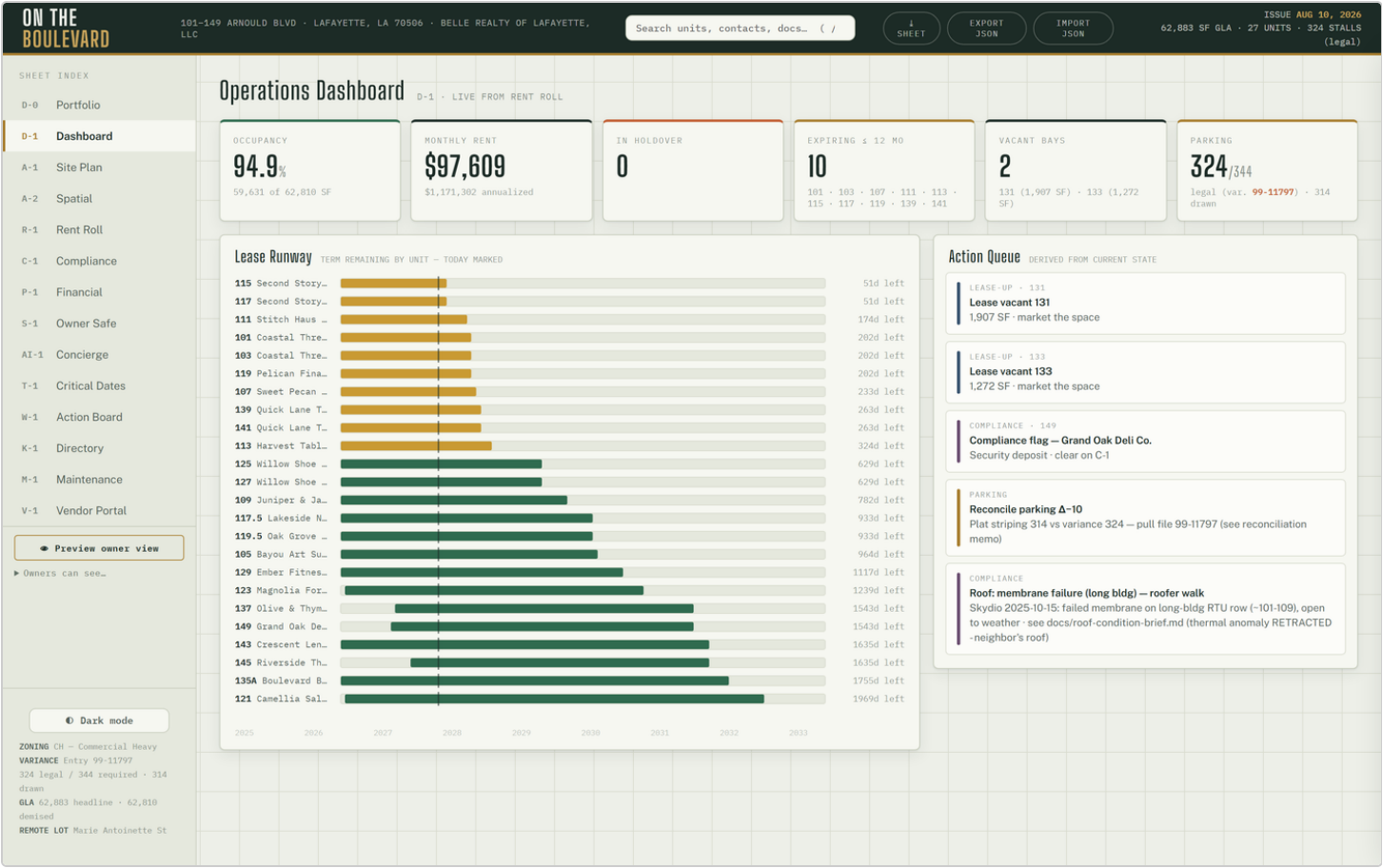
3. **AI-1 History** — the daily automated scan (11:00 UTC) may have opened a thread: a renewal window entered 180 days, a holdover appeared, occupancy dipped, the camera pipeline went quiet, a voice lead never booked, or a payment arrived that couldn't be matched. Each condition opens exactly **one** thread, ever — if there's nothing new, there's nothing there.
 4. **M-1 Maintenance** — new tenant requests (from the portal or the phone line) appear in the queue. Triage per §3.10. 4a. **L-1 Comm Log** — the "Calls · 7 days" strip and the attention filter: every recorded phone call with its summary, intent and urgency chips; listen, read the turns, then ✓ **Mark handled** (§3.19).
 5. **Mail/phone → the system** — anything that arrived outside the system (a signed lease, a COI, a check conversation) gets recorded where it belongs the same day: SOT update (§5.3), vendor folder (§3.13), ledger entry (§3.11).
-

Part III — Sheet-by-sheet instructions

3.1 D-0 Portfolio

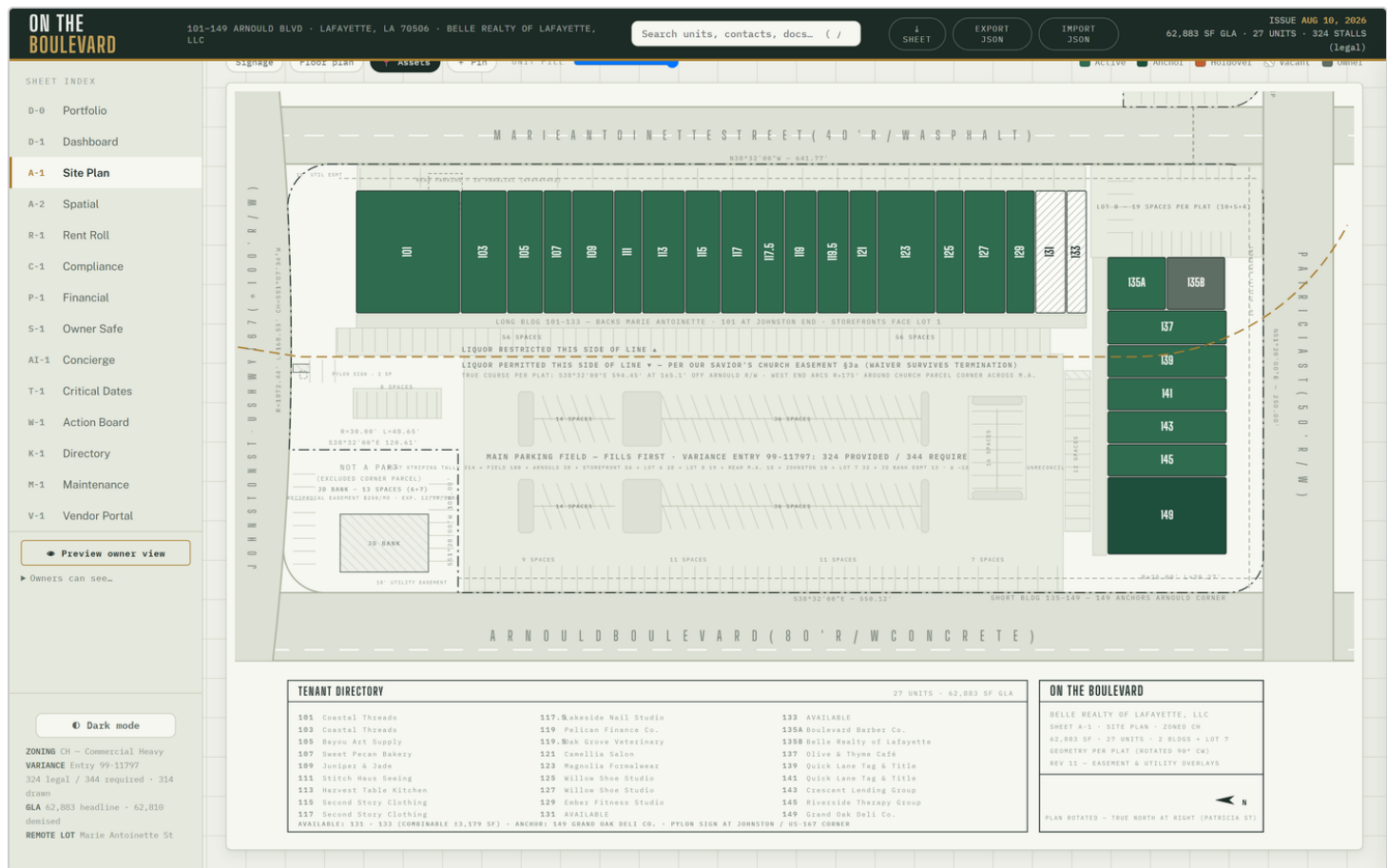
One card per property you can see: A/R outstanding (sum of positive unit balances over effective ledger entries) and open work orders, with an as-of stamp. "Open →" switches the active property. With a single property the **property switcher** stays hidden; at two or more it appears in the sidebar (see the onboarding manual). Derived — nothing to maintain here.

3.2 D-1 Dashboard



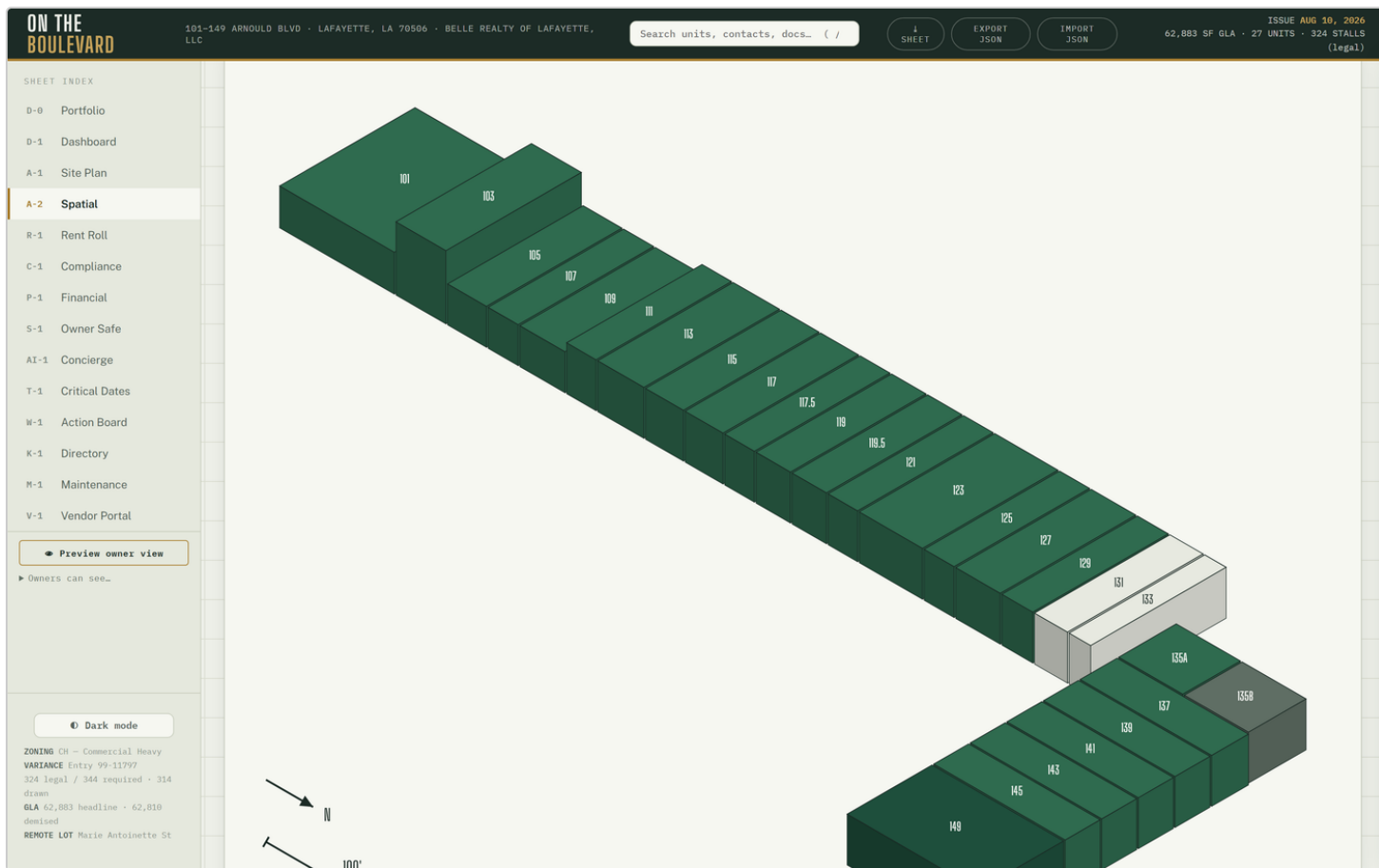
Read-only KPIs derived from live data — nothing to maintain here. Cards: occupancy/rent KPIs, parking variance (from the instruments file, not typed), **Parking Occupancy (C3)** with 7-day trend (48-hour freshness window; the as-of label shows date+time for non-today samples), **Network (UniFi)** up/down, **Automation (cron)** — green with last-run age; brick-red STALE past 26 hours, which matters because maintenance aging, voice leads, C3 heartbeat, UniFi, rent posting, and the owner brief all ride that one daily cron — **Client Errors (24h)** (renders only when the count is nonzero), the **Calls** KPI (recorded voice calls awaiting attention), and the Action Queue (same cards as W-1). If a card shows brick-red, it is telling you something needs attention.

3.3 A-1 Site Plan



The recorded plat, interactive. A **View** row above the chips sets a preset — Leasing · Daily Ops · Building Systems · Common Areas · Signage · Roof · Site / Hardscape — and the chips re-derive from it; toggling any chip by hand drops the preset highlight. **Chips** toggle overlay layers: - **Lenses**: Status / Expiry / Rent / Use / HVAC / Size — unit fills + legend. - **Parking** — the 314 plat-labeled stalls by zone, plus the 10-stall Johnston row the CAD stripes but the plat never labels (marked as such). - **Access** — ingress/egress as built: every curb cut drawn as an apron with its throat width, two-way arrow pairs at the cuts and along the aisles, the Arnould raised median and its one 55' opening (Driveway A is the only full-movement cut), edge-of-pavement lines, Lot 7's open Patricia frontage. Source: the architect CAD, satellite-confirmed (docs/site-access-inventory-2026-09.md). - **Easements** — the §3a liquor line and its notes, the church easement note, 10' utility easements, electric easement 577566, the 5×5' guy easement. Switch off for a clean leasing exhibit. - **Cameras** — 17 mounts with view cones; click one → its live view. **Adjust cams** (operator-only): drag pin to move, drag the brass dot to re-aim, double-click to reset; corrections persist. - **Occupancy** — latest measured stall states painted green/outline over the storefront row, Lot 8 pocket, and the 149 corner. - **Pins / + Pin** — drop a pin per water shutoff, meter, bench, column — and for lease/ops designations: reserved parking, monument-sign site, common area, loading zone, dumpster pad. Pins also appear on the satellite lens. - **Overlay** → **Floor plan** — whole-center floor-plan raster under the unit boxes, with an opacity slider. Click any unit → drawer.

3.4 A-2 Spatial (four lenses)



- **Iso** — SVG isometric, real CAD heights; ↑↓ toggles true heights; ↓ SVG exports a standalone file.
- **3D** — orbitable massing; **Mesh** swaps in the photogrammetry mesh.
- **Satellite** — frozen basemap with georeferenced footprints, unit labels, asset pins; opens plan-oriented (Marie Antoinette top).
- **Reality** — photoreal drone splat; toggles unit overlays; click a storefront → drawer. All lenses share the same selection — pick a unit in one, it's selected in all.

3.5 R-1 Rent Roll

ON THE BOULEVARD

101-149 ARNOULD BLVD • LAFAYETTE, LA 70506 • BELLE REALTY OF LAFAYETTE, LLC

Search units, contacts, docs... (/)

1 SHEET

EXPORT JSON

IMPORT JSON

62,883 SF GLA • 27 UNITS • 324 STALLS (legal)

ISSUE AUG 10, 2026

SHEET INDEX	101	Coastal Threads Coastal Threads, LLC	6,877	15.50	2.00	0.75	1.00	19.25	\$11,031.85	▲ Feb 28, 2027	● ACTIVE
D-0 Portfolio	103	Coastal Threads Coastal Threads, LLC	3,054	15.50	2.00	0.75	1.00	19.25	\$4,899.13	▲ Feb 28, 2027	● ACTIVE
D-1 Dashboard	105	Bayou Art Supply Bayou Art Supply, LLC	2,222	16.75	2.00	0.75	1.00	20.50	\$3,795.92	Mar 31, 2029	● ACTIVE
A-1 Site Plan	107	Sweet Pecan Bakery Sweet Pecan Bakery, LLC	1,743	17.50	2.00	0.75	1.00	21.25	\$3,086.56	▲ Mar 31, 2027	● ACTIVE
A-2 Spatial	109	Juniper & Jade Juniper & Jade, LLC	2,546	16.75	2.00	0.75	1.00	20.50	\$4,349.42	Sep 30, 2028	● ACTIVE
R-1 Rent Roll	111	Stitch Haus Sewing Stitch Haus Sewing, LLC	1,690	17.50	2.00	0.75	1.00	21.25	\$2,992.71	▲ Jan 31, 2027	● ACTIVE
C-1 Compliance	113	Harvest Table Kitchen Harvest Table Kitchen, LLC	2,606	16.75	2.00	0.75	1.00	20.50	\$4,451.92	▲ Jun 30, 2027	● ACTIVE
P-1 Financial	115	Second Story Clothing Second Story Clothing, LLC	2,170	16.75	2.00	0.75	1.00	20.50	\$3,707.08	▲ Sep 30, 2026	● ACTIVE
S-1 Owner Safe	117	Second Story Clothing Second Story Clothing, LLC	2,170	16.75	2.00	0.75	1.00	20.50	\$3,707.08	▲ Sep 30, 2026	● ACTIVE
AI-1 Concierge	117.5	Lakeside Nail Studio Lakeside Nail Studio, LLC	1,769	17.50	2.00	0.75	1.00	21.25	\$3,132.60	Feb 28, 2029	● ACTIVE
T-1 Critical Dates	119	Pelican Finance Co. Pelican Finance, LLC	1,982	17.50	2.00	0.75	1.00	21.25	\$3,509.79	▲ Feb 28, 2027	● ACTIVE
W-1 Action Board	119.5	Oak Grove Veterinary Oak Grove Veterinary, LLC	1,974	17.50	2.00	0.75	1.00	21.25	\$3,495.63	Feb 28, 2029	● ACTIVE
K-1 Directory	121	Camellia Salon Camellia Salon, LLC	1,709	17.50	2.00	0.75	1.00	21.25	\$3,026.35	Dec 31, 2031	● ACTIVE
M-1 Maintenance	123	Magnolia Formalwear Magnolia Formalwear, LLC	3,563	15.50	2.00	0.75	1.00	19.25	\$5,715.65	Dec 31, 2029	● ACTIVE
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	127	Willow Shoe Studio Willow Shoe Studio, LLC	2,538	16.75	2.00	0.75	1.00	20.50	\$4,335.75	Apr 30, 2028	● ACTIVE
	129	Ember Fitness Studio Ember Fitness Studio, LLC	1,789	17.50	2.00	0.75	1.00	21.25	\$3,168.02	Aug 31, 2029	● ACTIVE
	131	VACANT	1,907	—	2.00	0.75	1.00	—	— —		● VACANT
	133	VACANT	1,272	—	2.00	0.75	1.00	—	— —		● VACANT
	135A	Boulevard Barber Co. Boulevard Barber, LLC	1,580	17.50	2.00	0.75	1.00	21.25	\$2,797.92	May 31, 2031	● ACTIVE
	135B	Belle Realty of Lafayette Belle Realty Property Management	1,580	—	2.00	0.75	1.00	—	— —		● OWNER
	137	Olive & Thyme Café Olive & Thyme Café, LLC	2,053	16.75	2.00	0.75	1.00	20.50	\$3,507.21	Oct 31, 2030	● ACTIVE

Preview owner view

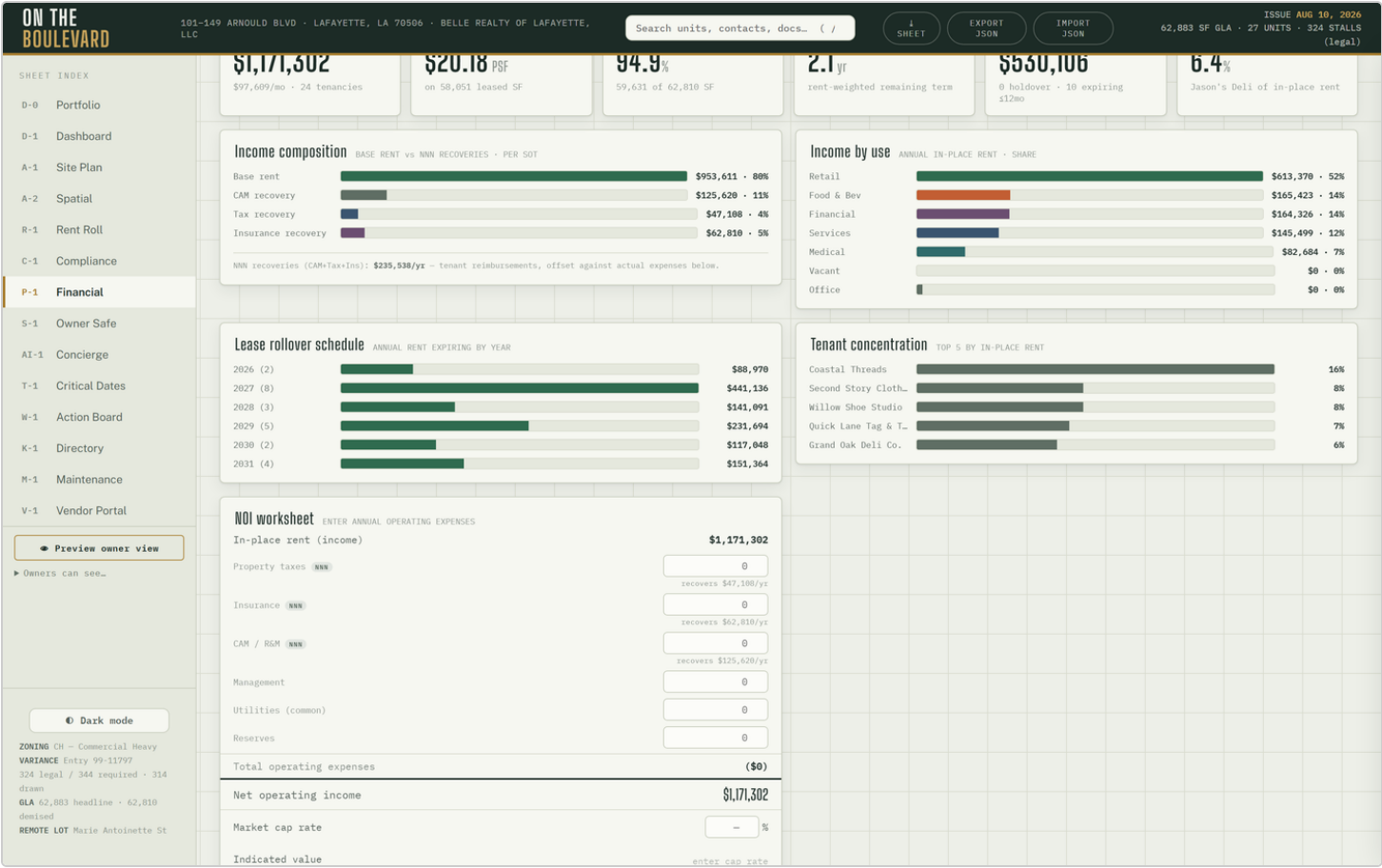
Owners can see...

Dark mode

ZONING CH - Commercial Heavy
VARIANCE Entry 99-11797
324 legal / 344 required • 314 drawn
GLA 62,883 headline • 62,010 devised
RENOTE LOT Marie Antoinette St

11 sortable columns; any bare monthly amount is **TOTAL rent** (base + additional). The PSF breakdown chart is the only place component economics (Base · CAM · Tax · Ins) appear — by design. ↓ **SHEET** prints the owner one-pager: guaranteed one page (the layout measures itself and shrinks to fit), with expiry flags — ▲ brick ≤6 months, △ amber 6–12 months — and a legend in the stamp.

3.6 P-1 Financial



Income composition (bars + a composition donut beside the Base · CAM · Tax · Ins breakdown), rollover, and concentration charts; the **NOI worksheet** (enter opex → NOI → cap-rate value) now opens with a **revenue → NOI waterfall** (gross potential rent + vacancy are labeled ESTIMATES at the effective PSF; expense steps are your worksheet lines only) and a **cap-rate sensitivity** table ±100 bp in 25 bp steps around the entered rate (or the flagged 8.50% appraisal reference when blank — never stored); **Collections & aging** (month collected-vs-charged, collections history bars, and per-unit FIFO aging from the ledger); **Tenant health** — five tiles plus a worst-first list with OK / Watch / At-risk chips and a "How this score is calculated" fold (score model 60/25/15; rows open the drawer; hosted only); and the **CAM reconciliation** card — year picker, prior-year opex worksheet, per-tenant caps from the lease abstracts (src/data/recovery-terms.json), derived occupancy gross-up, and a per-row ↓ **Statement** that prints the tenant's annual reconciliation with the PSF breakdown, cap line and methodology. Suites with unknown PSF print "Not determinable" rather than a guess. The Excel proforma (npm run proforma) is the owner-overridable model for underwriting conversations.

3.7 C-1 Compliance

ON THE BOULEVARD

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SHEET INDEX			CERTIFICATE	OCCUPATIONAL	HVAC PM CON	GREASE TRAP	HOOD / ANGU	SECURITY DE	M-9 ON FILE	LAST WALK-T	STORAGE APP	EXECUTED LT	ACH ON FILE
D-0 Portfolio	UNIT / TENANT												
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	135B Belle Realty of Lafayette												
	137 Olive & Thyme Café												
	139 Quick Lane Tag & Title												
	141 Quick Lane Tag & Title												
	143 Crescent Lending Group												
	145 Riverside Therapy Group												

Preview owner view

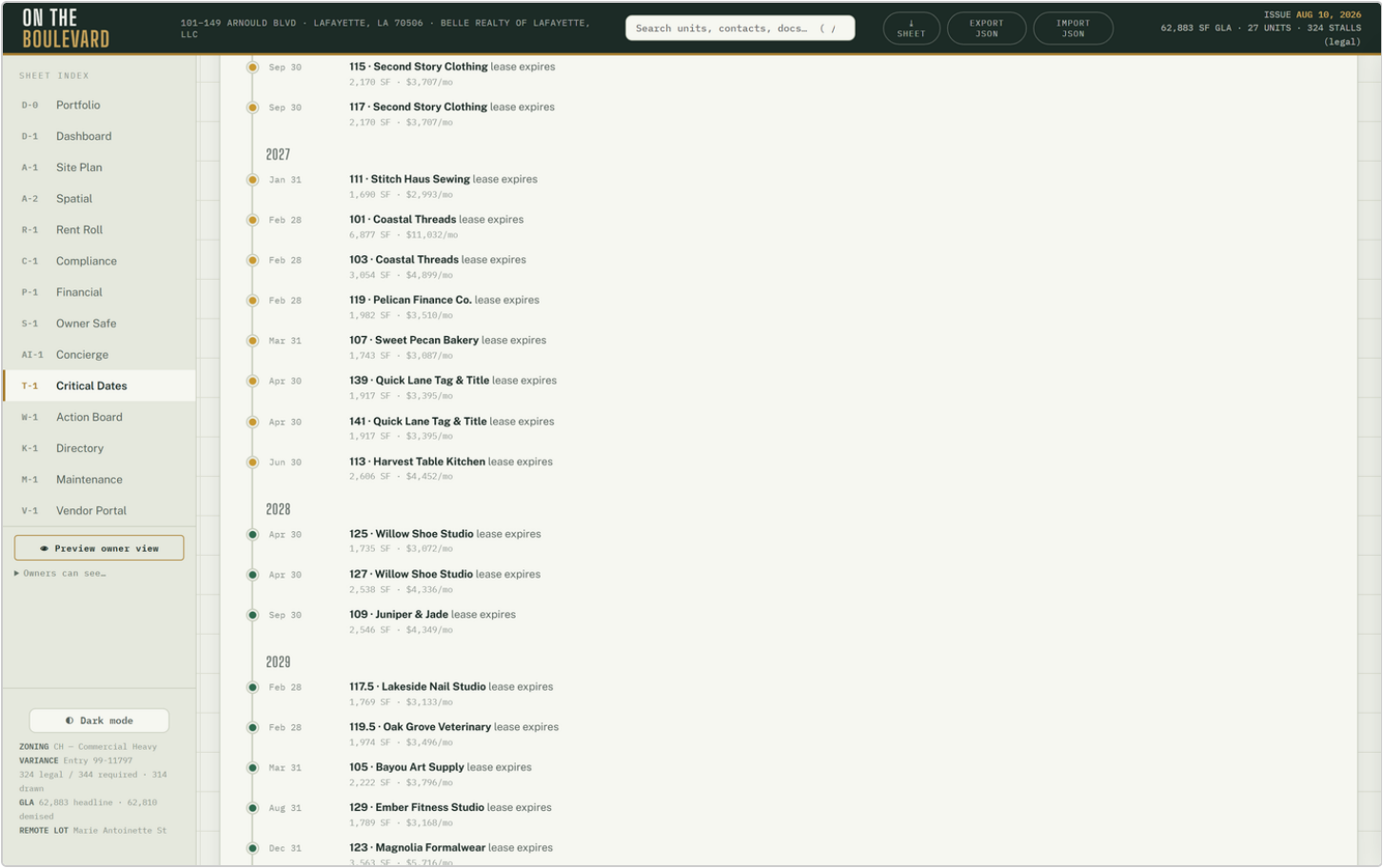
Owners can see...

Dark mode

ZONING CH - Commercial Heavy
VARIANCE Entry 99-11797
324 legal / 344 required · 314 drawn
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RENOTE LOT Marie Antoinette St

A **Document coverage** card sits above the matrix: per occupied suite — Lease · COI · COI expires · other documents — with filter chips and five summary counts. Evidence = a file on the suite's document records OR a matrix "On file"; a matrix Flag is a gap. Then the 11×27 matrix. **Click a cell to cycle** unknown → ok → flag → n/a (food-service-only fields apply only where relevant). Every flip is recorded — who, when, from→to — and 🕒 **History** shows the trail. You cannot corrupt this history; corrections are new flips. Edits sync live between devices — flip a cell on your phone and it flips on the desktop without a reload.

3.8 T-I Critical Dates



Three derived views — nothing to maintain: - **Lease expiry timeline** — a four-year Gantt with a today line and bucket cards (past end · <90 d · 90–180 d · >180 d · term unresolved). Suites whose lease end is unresolved in the September 2026 lease review list under "term unresolved" with their review label — BY DESIGN, never guessed. Row click → drawer. - **Renewal pipeline** — option terms transcribed from the executed leases (`src/data/renewal-options.json` , reference only; every notice = 60 days). Groups: Notice window · Deadline passed · Option available · Term unresolved. "Open suite" → drawer. - **Instrument + governance deadlines** — the JD Bank servitude end, the insurance renewals, the premium-finance maturity, and every S-I governance item with a date, on the same timeline as the leases.

3.9 W-1 Action Board

ON THE BOULEVARD

101-149 ARNOULD BLVD · LAFAYETTE, LA 70506 · BELLE REALTY OF LAFAYETTE, LLC

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ZONING CH - Commercial Heavy

VARIANCE Entry 99-11797

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GLA 62,883 headline · 62,810 devalued

REMOTE LOT Marie Antoinette St

Watch 13

Monitoring - no action due yet

RENEWAL 101 202d

Renewal window - Coastal Threads

Expires Feb 28, 2027 · open renewal dialogue

RENEWAL 103 202d

Renewal window - Coastal Threads

Expires Feb 28, 2027 · open renewal dialogue

RENEWAL 107 233d

Renewal window - Sweet Pecan Bakery

Expires Mar 31, 2027 · open renewal dialogue

RENEWAL 111 174d

Renewal window - Stitch Haus Sewing

Expires Jan 31, 2027 · open renewal dialogue

RENEWAL 113 324d

Renewal window - Harvest Table Kitchen

Expires Jun 30, 2027 · open renewal dialogue

RENEWAL 115 51d

Renewal window - Second Story Clothing

Expires Sep 30, 2026 · open renewal dialogue

RENEWAL 117 51d

Renewal window - Second Story Clothing

Expires Sep 30, 2026 · open renewal dialogue

RENEWAL 119 262d

Renewal window - Pelican Finance Co.

Expires Feb 28, 2027 · open renewal dialogue

RENEWAL 139 263d

Renewal window - Quick Lane Tag & Title

Expires Apr 30, 2027 · open renewal dialogue

RENEWAL 141 263d

Renewal window - Quick Lane Tag & Title

Expires Apr 30, 2027 · open renewal dialogue

Action Needed 5

Owner decision or outreach required

LEASE-UP 131

Lease vacant 131

1,907 SF · market the space

LEASE-UP 133

Lease vacant 133

1,272 SF · market the space

COMPLIANCE 149

Compliance flag - Grand Oak Deli Co.

Security deposit · clear on C-1

PARKING

Reconcile parking Δ-10

Plat striping 314 vs variance 324 - pull file 99-11797 (see reconciliation memo)

COMPLIANCE

Roof: membrane failure (long bldg) - roofer walk

Skydio 2025-10-15: failed membrane on long-bldg RTU row (4-5B1-199), open to weather - see docs/roof-condition-brief.md (thermal anomaly RETRACTED - neighbor's roof)

In Progress 0

Actively working

Cleared 0

Resolved - archive when stale

See Part II. A **leasing pipeline strip** over the deals table (inquiry → tour → proposal → signed; voice and web leads land here on their own) sits above the lanes. Card types include seeded facts (holdover, renewal, vacancy, compliance flag, covenant) and **live work-order cards** (`m1:` prefixed). Overrides (lane moves, dismissals) persist; the seed recomputes every render, so a dismissed card returns only if the underlying fact returns.

3.10 M-1 Maintenance (operator face)

- **Queue:** every request with status, age, unit, photos.
- **Assign:** pick a vendor from the service roster → the vendor sees it in V-1 immediately.
- **Status flips** and notes are append-only events.
- **Tenant logins:** the roster editor (email ↔ unit) controls who may sign in as a tenant. Add email + unit; they magic-link in like everyone else.
- **File on behalf:** log a phone-in request yourself.
- **Aging alarm:** unassigned requests older than 2 days (1 for emergencies) open a manager thread automatically. Tenant-side view: §4.3.

3.11 The Ledger (drawer → Ledger)

- Balance headline + last entries with running balance.
- ↓ **Statement** — a branded, printable tenant statement (owner-visible).
- **Prior payments** — 13 months of payment history with status-truth lateness (the July 2026 rows imported from Asset Command were bulk-entered; never trust their paid-at dates).
- **Lease abstract** (operator-only panel) — the abstracted terms, escalation steps and option terms for the suite, beside the ledger.
- **Monthly rent charges post themselves** (idempotently) on the 1st, since August 2026.
- **ACH payments post themselves.** Each unit has a reusable Stripe payment link (ACH only; roster with URLs: `docs/stripe-payment-links-2026-08.md`, copy on Drive). You send the link through your own channel — the app sends nothing. When the payment settles (ACH takes days), the unit's ledger gains an `ach:<payment-intent-id>` entry automatically. A payment that can't be matched to a unit, or that fails, opens a manager thread in AI-1 (`ach-unmapped:` / `ach-fail:`) instead of landing silently.
- **"Payment received"** records an out-of-band payment by hand.
- Add charge / credit / adjustment / NSF / write-off as needed.
- **Void** = ✕ on an entry → creates a *reversing entry* (nothing is deleted).
- **Late-fee chips:** past the 5-day grace, a suggestion chip appears (\$100 + \$25/day, the standard schedule). It posts **only when you confirm**. If a lease carries different late terms, flag it — policy goes per-unit.
- **Amount changes:** re-run `tools/stripe-payment-links.mjs` for that unit and retire the old link in the Stripe dashboard.

3.12 The E-Sign panel (drawer → E-Sign)

1. **Create** a request (optionally attach a document for review).
2. **Copy link / Copy message** — the app sends nothing; you deliver the link through your own channel (text/email). This is deliberate.
3. The signer opens a plain, branded page — no login needed — reviews, and signs or declines (E-SIGN/LA-UETA consent language included).
4. You see the live status (sent → viewed → signed/declined/expired), can **re-token** (invalidate + reissue) or **cancel**, and get a signed receipt. Tokens are single-lifecycle: double-signing or declining after signing is rejected by the database itself.

3.13 V-I Vendor Portal (operator face)

- Roster (service vendors first, green "portal" tag = they can sign in).
- Per-vendor private folder: upload / open / delete, all audited.
- **COI tracking:** set expiry + note per vendor → badge auto-classifies (expired / ≤30d / ≤60d / ok; missing is flagged for service vendors).

- 🗑️ **Parse cert:** drop an ACORD PDF → AI pre-fills carrier, limits, expiry, and a normalized note → review → **Save COI**. Always review before saving.
- Assigned work orders appear on the vendor's face automatically (\$4.2).
- **Inviting a vendor** = telling them to magic-link in with their roster email. Nothing else to configure.
- Policy: COI / W-9 / license are verified at **payment**, not dispatch.

3.14 K-1 Directory

ON THE BOULEVARD

101-149 ARNOULD BLVD • LAFAYETTE, LA 70506 • BELLE REALTY OF LAFAYETTE, LLC

Search units, contacts, docs... (/)

SHEET

EXPORT JSON

IMPORT JSON

ISSUE AUG 30, 2026

62,883 SF GLA • 27 UNITS • 324 STALLS (Legal)

SHEET INDEX

D-0 Portfolio

D-1 Dashboard

A-1 Site Plan

A-2 Spatial

R-1 Rent Roll

C-1 Compliance

P-1 Financial

S-1 Owner Safe

AI-1 Concierge

T-1 Critical Dates

W-1 Action Board

K-1 Directory

M-1 Maintenance

V-1 Vendor Portal

Preview owner view

Owners can see...

Dark mode

ZONING CH – Commercial Heavy

VARIANCE Entry 99-11797

324 legal / 344 required • 314 drawn

GLA 62,883 headline • 62,810 demised

REMOTE LOT Marie Antoinette St

Property Contacts

VENDORS • COUNTERPARTIES • AGENCIES

Gulf Coast Mechanical

HVAC VENDOR

no phone / email on file

Grand Oak Deli Co. (149) \$9.01 – monthly PM contract required; tenant maintains 100% of Unit 149 HVAC

JD Bank

EASEMENT COUNTERPARTY

no phone / email on file

Reciprocal parking easement – \$250/mo to Belle + 13 bank spaces; expires 12/30/2034

Our Savior's Church

EASEMENT COUNTERPARTY

no phone / email on file

Access & parking easement – \$350/mo, 25-yr; §3a liquor waiver survives termination

Montagnet & Domingue, Inc.

SURVEYOR

no phone / email on file

Recorded plat – 5/20/1994, last rev. 7/19/2019

Lafayette Consolidated Government – Planning, Zoning & Codes

ZONING AUTHORITY

no phone / email on file

Parking variance Entry 99-11797; zoned CH

Lafayette Utilities System (City of Lafayette)

UTILITY

no phone / email on file

Electric easement Entry 577566 (rear strip)

Fidelity National Title Insurance Company

TITLE INSURER

no phone / email on file

AIC 2007054432, Schedule B – Section 2 (exceptions)

+ Contact

Document Register

RECORDED INSTRUMENTS & KEY FILES – PASTE LINKS

Marketing package (Jul 2025, both editions)

MARKETING

docs/marketing-package-2025.md

2025 state package + older tenant brochure. Harvested facts + flagged conflicts (GLA 62,749 vs audited 62,883; 5 ac vs 4.84 ac) in the repo doc. Source PDF in Belle Shared Drive/Marketing.

no file linked

Roof condition brief (Skydio survey 2025-10-15)

REPORT

docs/roof-condition-brief.md

Membrane failure on long-building roof (RTU row, ~101-109), open to weather - get roofer on roof. (Thermal anomaly finding RETRACTED 2026-07-08: georef refit showed it on the neighbor roof north of Patricia.) Frames on 31 drive; key assets in docs/roof-brief-assets.

no file linked

Recorded plat of survey

SURVEY

Montagnet & Domingue, Inc. • 5/20/1994, last rev. 7/19/2019

Source of all traced geometry (REV 5-11). Schematic reproduction from CAD (rpm run plat) – not the certified instrument.

Open

Parking variance

ENTITLEMENT

Entry 99-11797

324 provided / 344 required; floor space limited to available parking

no file linked

Our Savior's Church access & parking easement

EASEMENT

–

\$350/mo • 25-yr • §3a liquor waiver survives termination

Open

JD Bank reciprocal parking easement

EASEMENT

exp. 12/30/2034 • supersedes Entry 2004-09057697

\$250/mo to Belle + 13 spaces • 50/50 maintenance

Open

City of Lafayette electric easement

EASEMENT

Entry 577566

Rear strip behind the long building

no file linked

Temporary drainage easements (EXPIRED)

EASEMENT

77-00783 / 77-000784 / 77-000785

0% record only – expired

no file linked

HVAC preventive-maintenance schedule

OPERATIONS

2021 PDF

Gulf Coast Mechanical scope; \$9.01 anchor covenant

Open

Master template set – SOT workbook

SOURCE OF TRUTH

OTB_Master_SOT_Lease_Logs_HVAC.xlsx

Tier 1 SOT – rent roll + lease, logo & HVAC Drive paths (supersedes -corrected.xlsx v1.1)

Open

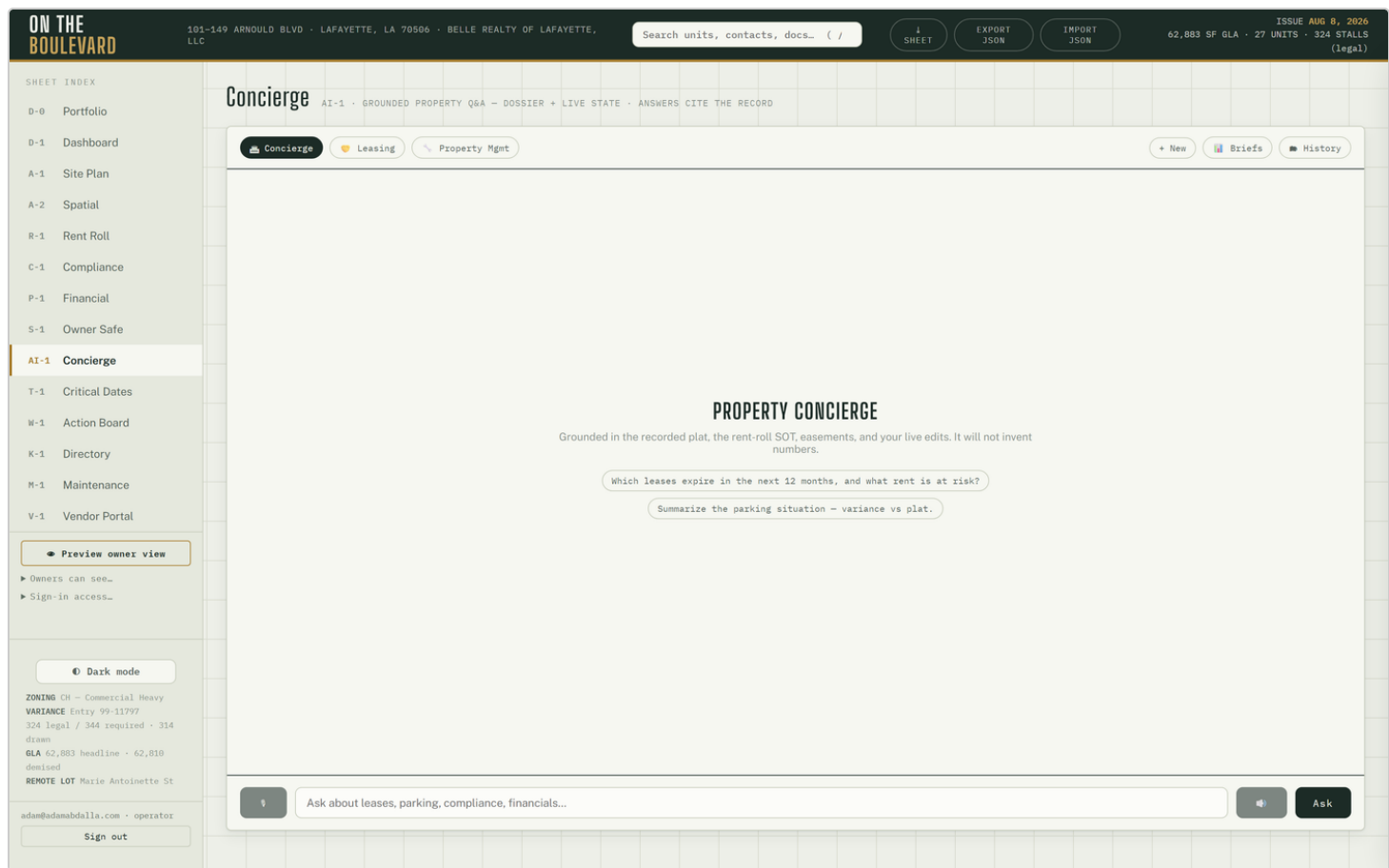
Property contacts (including the **Property lines** block – the tenant and leasing numbers – and the insurance contacts: agent, brokers, claims lines), the document register, and the site-imagery library. Register rows carry `counterparty • amount • effective • matures • status • risk` besides the file (📎 attach → the row's link becomes an "Open 📎 " that always serves a fresh secure URL); an **expiring strip** at the top lists what lapses next. The **pylon sign** renders as a native SVG elevation next to the tenant roster – hover links panel ↔ row, click → drawer; installed-but-unlisted faces draw brick-dashed.

3.15 S-I Owner Safe

Opens with **Property records**: a **Risk register** (worst-first) and a **Renewal & maturity radar** (soonest-first) derived from the document register – today that is the 2026–27 insurance program as bound (property • BOP liability + umbrella • workers' compensation, all renewing 2027-05-15, the premium-

finance agreement maturing 2027-03-15), the loan maturity, the lender title policy and the recorded instruments. Abstract of the bound policies: docs/insurance-program-2026-27.md . Then the **Governance** block (items with deadlines feed T-1), ↓ **Board report** (quarterly, assembled from the stored owner briefs), and the category folders (Proforma / Leases / Tax / Insurance / Banking / Other). Upload and open as the operator; owners read-only; vendors/tenants sealed out at the database layer. **Recent access** (operator-only) shows every view, upload, and delete with who and when.

3.16 AI-1 Agent Desk



Three personas — 🏠 **Concierge** (property Q&A), 🍷 **Leasing**, 🛠️ **Property Manager** — all grounded in the property dossier + live state. - Conversations persist and resume after reload; 📖 **History** reopens any thread; + **New** starts fresh. - 🗣️ mic input and 🗣️ spoken replies (Chrome/Edge). - **Numbers are guardrailed:** once a calculation is involved, every figure in the reply must trace to the deterministic engines or the reply is replaced with the engines' own summary. Ask the leasing agent things like "compare retaining at \$17 vs replacing at \$20 with 3 months free and \$10 TI, 5-yr term, 1,917 SF, 7.5% cap" — or the manager "should I spend \$45K on an RTU replacement with a \$120K reserve, \$30K/yr contributions, installed 2008, 15-yr life?" - 📄 **Briefs** — the monthly owner-brief archive; Open 🔒 renders any month. - 📦 **Lead SMS** (leasing persona): copies a ready-to-send text with the public leasing one-pager (otb.cypresscommand.com/leasing.html) and the leasing line number. You paste and send it — the app sends nothing. - **Lease packages (operator-only):** ask 🍷 Leasing to assemble a proposal; it collects

terms conversationally, then generates a branded DRAFT proposal (and optionally the internal owner summary) as a card with **Open** 🗝️ and **Email** (pre-filled mailto — you send it; it never auto-sends). Every generated document is DRAFT-stamped, subject to legal review.

3.17 The voice lines (LIVE)

- **Tenant line (337) 273-0384:** 24/7; triages per the SOP (emergencies = leak / electrical / break-in / sewer → dispatch + notify after-hours, never wakes you for permission); files real work orders into M-1; never discusses eviction timelines.
- **Leasing line (337) 270-7044:** takes name + number, quotes the approved rate range only, screens against exclusive-use conflicts, books tour slots (18h lead, Tue/Thu defaults; double-booking is impossible). **Truthful booking is enforced:** the agent cannot claim a tour is booked unless the booking tool actually succeeded; an unbacked claim is corrected or replaced with an honest fallback, and a leasing call that ends without a booking opens a `voice-lead:` manager thread within hours so no lead drops.
- Both greetings end "This call may be recorded." Every call is recorded at Twilio (once the Twilio account variables are set in Vercel), summarized the moment it ends (intent · urgency · unit · caller · callback · follow-up — nothing invented; hang-ups still record), written to **L-1** as a call card with the Caller/Agent turns and ▶ Play recording, mirrored as a transcript thread in AI-1 History, and e-mailed to the owners when a mail key is configured. Emergencies open a manager thread on their own.
- The leasing line can **send the leasing package** by e-mail (and by text once A2P messaging is approved): the caller's request creates a deal row and the agent may only claim the legs that actually went out.
- Calls that end before the summary lands are swept by the daily cron (≥20 minutes unfinalized) so nothing is lost.
- Go-live steps + secret rotation drill: `docs/a3-voice-runbook.md` ; call records: `docs/voice-call-records-runbook-2026-09-18.md` .

3.18 B-1 Marketing

Five blocks, every one generated from the source of truth on the fly — a flyer can never disagree with the rent roll, and **rates are never printed**: 1. **Availability flyers** — one printable flyer per vacant suite. 2. **Center overview** — stats · logo wall · site plan · availability. 3. **Tenant cards** — 1080-square co-marketing card per tenant. 4. **Photo library** — the assets bucket by suite; the operator picks the hero image per suite and the pick persists (`marketing` layer). 5. **360° tour media** — panoramas + hero stills uploaded to the PUBLIC `tour` bucket; **Publish manifest** refreshes what the /tour microsite shows. Insta360 export settings and the upload steps: `docs/marketing-b1-and-tour-2026-09-18.md` . Every output opens as a page with Print / Save PDF. The **pylon sign** block shows the sign, its roster and "tenants without a face" per tenant. QR codes for the leasing page and the tour live in `public/qr/` .

3.19 L-1 Comm Log

The cross-channel correspondence sheet. Filter by channel (note / e-mail / letter / meeting / SMS / voice / web) or unit, search, expand an entry, hand-log new correspondence, delete stale rows. **Voice rows** (§3.17) carry intent and urgency chips, a needs-attention dot, the summary, outcome links (work order · tour · lead · package), ► Play recording, the Caller/Agent turns, and ✓ **Mark handled**. The "Calls · 7 days" strip and the attention filter are the morning triage (Part II). Web tour requests from /tour land here too. Owners see the log read-only, including every call's summary, transcript and recording; tenants and vendors never see this sheet.

3.20 N-1 Matters & Planning

Long-running property affairs as status-filtered cards: kind (lease negotiation, claim, permit, dispute, project, general), status, deadlines, correspondence and file attachments. Operator: open a matter, edit fields inline, log meeting notes (they mirror into L-1), attach documents (they ride the documents bucket), close or reopen. Deadlines feed T-1. Owners read the cards and open attachments but never attach.

3.21 O-1 Operations

The procedures (SOP) library — categories → procedures → steps, with due-today / overdue / streak state. Browse, expand a procedure, ✓ **Complete** with notes and minutes (it closes the oldest open occurrence), author new content (add or edit categories, procedures, steps; deactivate), clear stale occurrences. The daily cron materializes each scheduled procedure's current occurrence and opens ONE "SOPs overdue" digest thread in AI-1 keyed by the newest lapse (a static backlog never re-fires). Owners read-only; tenants and vendors never see O-1.

3.22 The public /tour microsite

`otb.cypresscommand.com/tour` needs no sign-in: a 360° viewer per suite when panoramas have been published from B-1, otherwise the plat, the numbers and Call / Text-to-tour. The **Request a tour** form writes a web lead (deal row + L-1 note, capped per day), opens a manager thread in AI-1, and e-mails the owners when mail is configured. The leasing one-pager stays at `/leasing.html`.

Part IV — Counterparty guides

4.1 Owners

Sign in with your authorized email (the owner list is fixed by the operator — §6.1). You see the sheets the operator has shared (dashboard, rent roll, financials, and the Safe are typical), **read-only**. The Comm Log, when shared, lets you listen to any recorded call and read its summary and transcript. The  **Briefs**

panel in AI-1 holds your monthly intelligence brief — every figure deterministic, archived permanently. You may ask the AI desk questions; its numbers are guardrailed the same as the operator's.

4.2 Vendors

Magic-link in with the email the operator has on file. You see one sheet: your own folder (your documents + "send a file to management"), your COI status with a renewal nudge, and **your assigned work orders** — open each to read notes and photos, add notes, and ✓ **Mark complete** when done.

4.3 Tenants

Magic-link in with the email your management added. You see M-1 for **your unit only**: file a maintenance request (describe the problem, attach photos), watch its status, and "**Your account**" — your current balance and recent ledger entries. Rent is paid through the payment link management sends you — one link per unit, reusable every month. Emergencies (water leak, electrical hazard, break-in, sewer): call the maintenance line rather than filing a ticket.

4.4 Document signers

You'll receive a link from management. It opens a simple page — no account, no app. Review the request (and the attached document if one is linked), then sign or decline. The signature is recorded with timestamp and consent language under the federal E-SIGN Act and Louisiana UETA.

Part V — Rhythms

5.1 Daily (mostly automatic)

- 11:00 UTC — proactive scan: renewals/holdovers/occupancy → AI threads; work-order aging; camera-pipeline heartbeat; rent-charge posting; unmatched-ACH threads; unbooked voice leads; UniFi outages; unfinalized voice calls swept into L-1; scheduled procedures materialized on O-1 and ONE "SOPs overdue" digest thread. The scan also stamps the **Automation (cron)** card on D-1 — if that card goes brick, every one of those safety nets is silent; treat it as urgent.
- 12:00 local + 23:45 local — camera frames classified + uploaded (hands-free; the sampler is watchdog-healed).
- You: the Part II walk — dashboard, board, AI history, maintenance queue.

5.2 Monthly

- **1st:** Owner Intelligence Brief generates itself; rent charges post themselves. Skim the brief before the owner does.
- Send (or re-send) payment links through your channel; ACH payments post themselves as they settle; confirm or dismiss late-fee chips after the grace window.
- Documented property walk (per SOP); update C-1 flags as found — the history logs itself.

5.3 When a lease is signed / a fact changes (governed SOT update)

1. Update the source of truth: `docs/lease-population-2026-09-10.md` and the suite's `leaseEvidence` in `src/data/units.json` (Tier 1 since the September 2026 lease review; `docs/sot-2026-07/` stays authoritative for suites the review does not name). Supersession rules: `docs/sot-supersession-2026-09-11.md`.
2. Apply the change to `src/data/units.json`. Leave a lease `end` BLANK when the signed documents do not resolve it — T-1 and W-1 then show "term unresolved" instead of a guessed date. No holdovers are assumed.
3. `npm run split-seed` && `npm run concierge-context` (the test suite fails if you forget — deliberately).
4. `npm test` → commit → deploy (§6.3) → verify live. Never trust an imported system's dates over signed paper; store stated-rent exceptions as exceptions — do not "fix" them to formula.

5.4 Periodic

- COI badges: chase at ≤ 60 days, escalate at ≤ 30 (§3.13).
- Semi-annual house HVAC PM (the anchor unit is excluded — its lease requires the tenant to maintain its own HVAC with the designated contractor).
- Move-out: solo walk + photos within 30 days; file to the unit's assets.
- Re-run marketing artifacts when availability changes (`npm run poster` , leasing one-pager per `tools/leasing-package.py`).

Part VI — Administration & recovery

6.1 Granting and revoking access

- **Owner:** sidebar → "Sign-in access..." → type email → + **Owner**. Their first magic link lands them as owner. Anyone stuck in pending is listed there with one-click "make owner". Revoke = ✕ (removes pre-authorization; demoting an existing profile is a Supabase console step).

- **Vendor:** ensure their email is on the roster; tell them to sign in.
- **Tenant:** M-1 → Tenant logins → add email + unit. Remove the row to cut access.
- **Owner sheet visibility:** the "Owners can see..." panel controls which sheets owners get.

6.2 Quality gates (never skip)

`node --check` on changed modules · `npm test` (777) · `npm run build` · **deploy** · **grep the prod bundle for the change** · smoke the live URL. Since 2026-09-11 **every push to** `master` **deploys** through `.github/workflows/deploy.yml` (`npm ci` → `npm test` → `vercel build/deploy --prod`); a failing test blocks the deploy. Verify by fetching the live page and checking the `assets/main-<hash>.js` bundle name against the local build.

6.3 Deploying

Push to `master` (or merge a PR) — GitHub Actions deploys production. Manual fallback from this machine:

```
npx vercel deploy --prod --yes --scope adams-projects-0c52918e
```

(`.vercelignore` governs uploads — the 16MB splat + 3MB mesh ride in `public/`.) Never promote a Preview deployment: previews run against the isolated Supabase branch and the build aborts if production secrets leak into the Preview scope.

6.4 Backup & portability

- Topbar **Export** → full-state JSON. Take one before risky edits; **Import** restores.
- The repo is the authoritative system; all exports (dossier, buyer set, posters) are disposable and regenerable. Every export also lands on `G:\My Drive\00 OTB\`.
- A scheduled task (`OTB-Repo-Backup` , daily 03:00) bundles full git history to Drive. Committed-only — commit anything that matters.
- Local preview without login: dev server on port **5199**; move `.env` aside temporarily — and restore it after. (Confidential rents do not render in that mode — by design.)

6.5 Secrets

Keys live **only** in Vercel env — never in chat, repo, or disk. Rotations are scripted drills: `tools/rotate-secret.mjs` (shared cron secret), `tools/rotate-voice-secret.mjs` (voice). One-shot key needs (e.g. the restricted Stripe key used to mint payment links) follow the drop-use-delete drill: key to a dotfile, tool consumes it, file deleted — never in chat. Vercel rejects env values with trailing whitespace at deploy time — the scripts handle this; when feeding a secret to a CLI, use `cmd /c "... < file"` (PowerShell pipes append a newline).

6.6 The camera (C3) pipeline

Fully hands-free: sampler (5-min ticks, watchdog task self-heals it at logon + every 5 min) → midday 12:00 + nightly 23:45 classify + upload → app surfaces. If it goes quiet 36 hours, a manager thread opens on its own. After a machine reboot the watchdog relaunches the sampler; no manual step. Known conventions: capture day-directories are UTC-keyed; frames live outside the repo.

6.7 Known limits (deliberate v1 boundaries)

- E-sign, lease proposals, and payment links: the operator transmits links/documents; the app sends nothing outbound on its own.
- Voice: no SMS notify on dispatch, no live call transfer, no daily call cap (set a Twilio usage trigger); recordings and the leasing-package e-mail wait on the Twilio and mail keys in Vercel; the leasing package by text waits on A2P approval; settings edits via SQL until a UI lands.
- B-1 outputs and the /tour site never print a rate; the operator quotes rates in person or by the leasing line's approved range.
- Desktop-first; the phone experience is a responsive web app, not a native app.
- Onboarding a second property is operator-driven (see the onboarding manual); there is no self-serve signup.

Questions the manual doesn't answer: ask the 🏠 Concierge — it is grounded in the same governed data this manual describes.

BOOK II — PROPERTY ONBOARDING

Cypress Command Platform — Property Onboarding Manual

Version September 2026 · the Phase C-1 rail, funnel-proven by the C-2 live run Operator-driven by design — there is no self-serve signup. One intake file = one property.

This is the complete procedure for bringing a new property onto the platform: what to collect, how to build the intake file, how to run it (dry, then live), how to verify the result, and what the new property's people do next. It ends with the deliberate v1 fences and the teardown procedure.

1. What onboarding does

A successful run creates, in one all-or-nothing transaction:

1. **The organization** (management company) — or reuses it by slug if it already exists, so a second property lands under the same org.
2. **The property** — slug, name, address, timezone, plus a `facts` list (label/value/source rows that dashboard-class cards derive from).
3. **The property settings row** — ledger start month, renewal horizon, occupancy floor, late-fee schedule, and a free-form SOP settings object.
4. **The authorized-email list** — email + role rows. No user accounts are forged: each person becomes real the first time they magic-link in, and the membership lattice assigns their role automatically.

The moment it lands, the property appears as a card on **D-0 Portfolio**, and — at two or more visible properties — the **property switcher** appears in the sidebar for every org-wide member. Nothing else changes: rent posting and API surfaces keep serving the default property until the new one is deliberately activated.

 D-0 Portfolio — each onboarded property is a card

2. What to collect before you start (intake checklist)

Org (management company) - Slug (lowercase, hyphens — permanent, choose once) and display name. - Brand kit if available (palette / wordmark / contact block) — may start empty `{}` .

Property - Slug (permanent), display name, street address, IANA timezone (e.g. `America/Chicago`). - Facts worth surfacing: GLA, unit count, parking (with source citations — "rent roll 2026-08", "site plan"...). Facts are display rows, not schema; add what the owner will want to see.

Settings - `ledger_start_ym` (`YYYY-MM`) — the first month rent charges will post. Choose the first FULL month on the platform; historical balances are a data-package concern, not an onboarding concern. - `renewal_horizon_days` (default 180), `occupancy_floor` (default 0.85), late-fee schedule (`late_grace_days` / `late_flat` / `late_per_day`). - SOP answers (emergency policy, vendor rules ...) — free jsonb under `settings.settings` .

People - Every email that should have access on day one, each tagged with a role: `operator` (full control) or `owner` (read-only, operator-curated sheets). Vendors and tenants are NOT onboarding rows — they come later through the vendor roster and tenant-login editor inside the app.

3. Build the intake file

The easy way — the intake form (no technical knowledge needed)

ORANGE OCEAN ATLAS · PROPERTY INTAKE

FILL IN · CLICK "DOWNLOAD INTAKE FILE" · SEND THE FILE TO YOUR ONBOARDING CONTACT

Answer what you know — anything marked **optional** can be left blank and added later. Nothing here touches any system; this page only prepares a file. It works without internet.

1 · Management company

Company name

The management company that will operate the property — e.g. "Example Management, LLC"

Example Management, LLC

2 · The property

Property name

Example Shopping Center

Street address

100 Example Blvd, Lafayette, LA 70506

Time zone

Central (Louisiana, Texas...)

Property facts (optional — the figures the owner should see on the dashboard; say where each number comes from)

WHAT	VALUE	WHERE IT COMES FROM	
GLA	50,000 SF	rent roll	×
Units	50,000 SF	rent roll	×
Parking	50,000 SF	site plan	×

+ add a fact

3 · Money rules

First month of rent billing

The first FULL month on the platform

September 2026



Late-fee grace (days)

5

Late fee — one time (\$)

100

Late fee — per day after (\$)

25

► Advanced (fine to leave as-is)

4 · Who gets access on day one

Each person signs in with their email — no passwords to set up. **Operator** = runs the property, full control. **Owner** = read-only view of the sheets the operator shares. Vendors and tenants are added later, inside the app.

EMAIL	ROLE
name@example.com	Operator — full control ✕

Send the new property's manager the intake form link —

<https://otb.cypresscommand.com/manual/intake-form.html> (or email them the file itself, `docs/phase-c/intake-form.html` — it works offline too). They answer plain-English questions — company name, property name and address, first billing month, late-fee schedule, who gets access — then click ↓ **Download intake file** and send back the resulting `intake-<property>.json`. The form checks its own answers as they go (problems appear in plain English), auto-derives the permanent slugs from the names, and cannot produce a file the validator would reject. It only prepares the file — nothing is created until you run the rail in §4–5.

Anything they skip (facts, notes) you can add to the JSON afterward; their free-text notes arrive under `settings.settings.intake_notes` for you to translate into real SOP settings.

The technical way — edit the JSON directly

Copy the template and fill it in:

```
docs/phase-c/onboarding-intake-template.json → docs/phase-c/intake-<slug>.json
```

```

{
  "org": {
    "slug": "example-mgmt",
    "name": "Example Management, LLC",
    "brand": {}
  },
  "property": {
    "slug": "example-center",
    "name": "Example Shopping Center",
    "address": "100 Example Blvd, Lafayette, LA 70506",
    "tz": "America/Chicago",
    "facts": [
      { "label": "GLA", "value": "50,000 SF", "source": "rent roll 2026-08" },
      { "label": "Parking", "value": "250 spaces", "source": "site plan" }
    ]
  },
  "settings": {
    "ledger_start_ym": "2026-09",
    "renewal_horizon_days": 180,
    "occupancy_floor": 0.85,
    "late_grace_days": 5,
    "late_flat": 100,
    "late_per_day": 25,
    "settings": {}
  },
  "authorized": [
    { "email": "operator@example.com", "role": "operator" },
    { "email": "owner@example.com", "role": "owner" }
  ]
}

```

Rules the validator enforces (the tool refuses to touch the database on any error): slug shape, timezone shape, `YYYY-MM` ledger start, role whitelist, fact and authorized row shapes. Reusing an existing org slug is legitimate (that is how a portfolio grows); reusing an existing **property** slug under the same org is refused.

4. Dry-run

```
node tools/onboard-property.mjs docs/phase-c/intake-<slug>.json --dry-run
```

Validates the file and prints the full plan — org reuse vs create, the property row, settings, and authorized emails — without any database contact. Fix anything wrong and re-run until the plan reads exactly like the deal.

5. Live run

The live run uses the standard CRON_SECRET pull-load-delete drill (the secret is pulled from Vercel env for the moment of use — never typed into chat, never left on disk):

```
node tools/onboard-property.mjs docs/phase-c/intake-<slug>.json
```

The RPC is all-or-nothing: any failure rolls the entire intake back. A **duplicate property raises** (P0001) and clobbers nothing — this is the protection, not an error to work around.

6. Verify (two minutes)

In the app (as an org-wide member): 1. **D-0 Portfolio** shows the new property's card (\$0 A/R, 0 work orders — correct for an empty property). 2. The **property switcher** now renders in the sidebar (it appears only at two or more visible properties). 3. Switch to the new property — every sheet boots **empty**. That is correct: a fresh property has no data package (§8).

In SQL (Supabase console), if you want belt-and-suspenders:

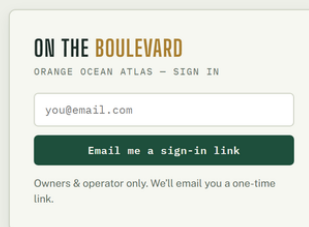
```
select p.slug, p.name, p.created_at, s.ledger_start_ym
from properties p join property_settings s on s.property_id = p.id
order by p.created_at;

select email, role from authorized_emails order by email;
```

Financial isolation: the rent cron posts only to the default property; `api/*` still resolves the flagship. A newly onboarded property cannot create financial side effects until it is deliberately given a data package and activated.

7. First sign-ins

Send each authorized person to the login page — they enter their email and click the magic link; their membership row and role materialize on first sign-in. Nothing to provision, no passwords to distribute.



- The new **operator** lands with full control of their (empty) property.
- **Owners** land read-only on the operator-curated sheet set.
- Anyone not on the authorized list lands on the pending screen with no data access — promote or ignore from the sidebar's access panel.

8. The vl fences (deliberate — do not fight them)

1. **No data package.** Onboarding creates the container, not the contents: units, geometry, rent roll, and seeds are the site-plan-tier premium step (Phase C data-package pipeline). Until that lands for the new property, the 17 property sheets remain bound to the flagship's bundled data — the new property renders correctly on D-0 and boots its own sheets empty.
2. **Known residual while switched:** manual edits made while you are actively switched INTO a data-less property will sync to that property. Don't do data entry on a property that hasn't had its package built.

- 3. **No storage folder prefixes yet** — the decision is deferred until the first real pilot's document volume makes the shape obvious.
- 4. **No self-serve UI.** Governed, operator-driven onboarding is the deliberate wedge; a UI can wrap this rail later without changing it.

9. Teardown (removing a property)

The C-2 proof property was created and torn down cleanly with this exact pattern. Order matters (children first), and this is irreversible — read twice, run once:

```
-- any typed-layer/child rows first (comp_state, board_state, ...), then:
delete from property_settings
  where property_id = (select id from properties where slug = '<slug>');
delete from properties where slug = '<slug>;
```

Then verify: D-0 shows one card fewer; the switcher disappears if only one property remains; the flagship's data is untouched.

10. Troubleshooting

SYMPTOM	MEANING	DO
Validator errors on dry-run	Intake file shape is wrong	Fix the listed fields; nothing was sent
P0001 duplicate raise on live run	Property slug already exists under that org	This is the no-clobber guard. Pick a new slug, or tear down the old property first
New property card missing on D-0	Viewer is not an org-wide member	Check the viewer's membership; org-wide members see all properties
Switcher not visible	Only one property is visible to you	Correct at one property — it renders at two or more
Sheets look like the flagship after switching	You are looking at bundled flagship data	Expected until the property's own data package exists (§8)
Someone stuck on "pending"	Email wasn't in authorized , or typo'd	Add/fix via the sidebar access panel; they re-click a fresh magic link

Provenance: intake contract and rail design docs/phase-c/01-onboarding-design.md ; validation seam src/lib/onboard.js ; RPC migration onboarding_rpc ; driver tools/onboard-property.mjs . The rail

was smoke-tested under rollback on prod and funnel-proven live by the C-2 run (property created via the rail, verified, then torn down).