

ORANGE OCEAN ATLAS · OTB

COMPLETE PROGRAM DOCUMENTATION · AUGUST 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

Orange Ocean Atlas — Operating Manual (On The Boulevard deployment)

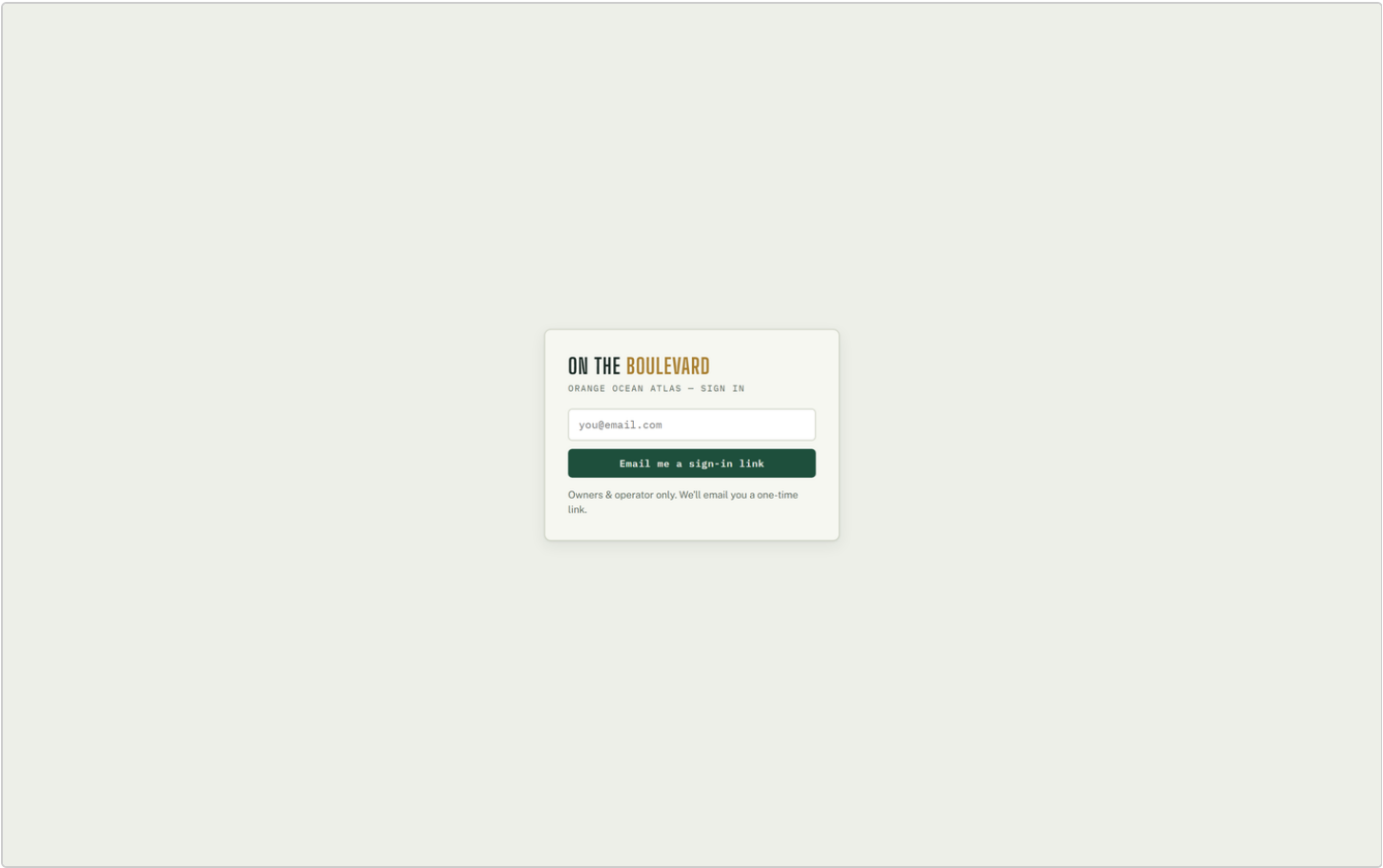
Version August 2026 · covers the 14-sheet production build (340 tests) Live app:

<https://orangeoceanatlas.com> (also `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** — iso / 3D / satellite / photoreal lenses
- **R-1 Rent Roll · P-1 Financial** — money
- **C-1 Compliance · T-1 Critical Dates** — obligations
- **W-1 Action Board** — kanban of everything needing action
- **K-1 Directory** — contacts, document register, site imagery
- **M-1 Maintenance** — work orders (also the tenant's sheet)
- **S-1 Owner Safe** — sealed document vault
- **AI-1 Concierge** — the three AI personas
- **V-1 Vendor Portal** — vendor roster, COIs, work orders

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 30, 2026

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D-0 Portfolio

D-1 Dashboard

A-1 Site Plan

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R-1 Rent Roll

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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 99-11997 324 legal / 344 required · 314 drawn GLA 62,883 headline · 62,810 devalued 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, 2024282 days remainingFeb 28, 2027

HVAC RESPONSIBILITY (\$ cap — tenant 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

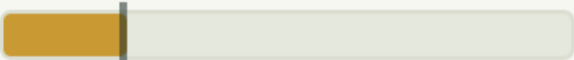
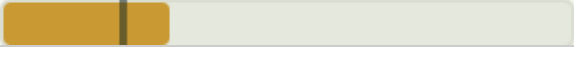
131 (1,907 SF) · 133
(1,272 SF)

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

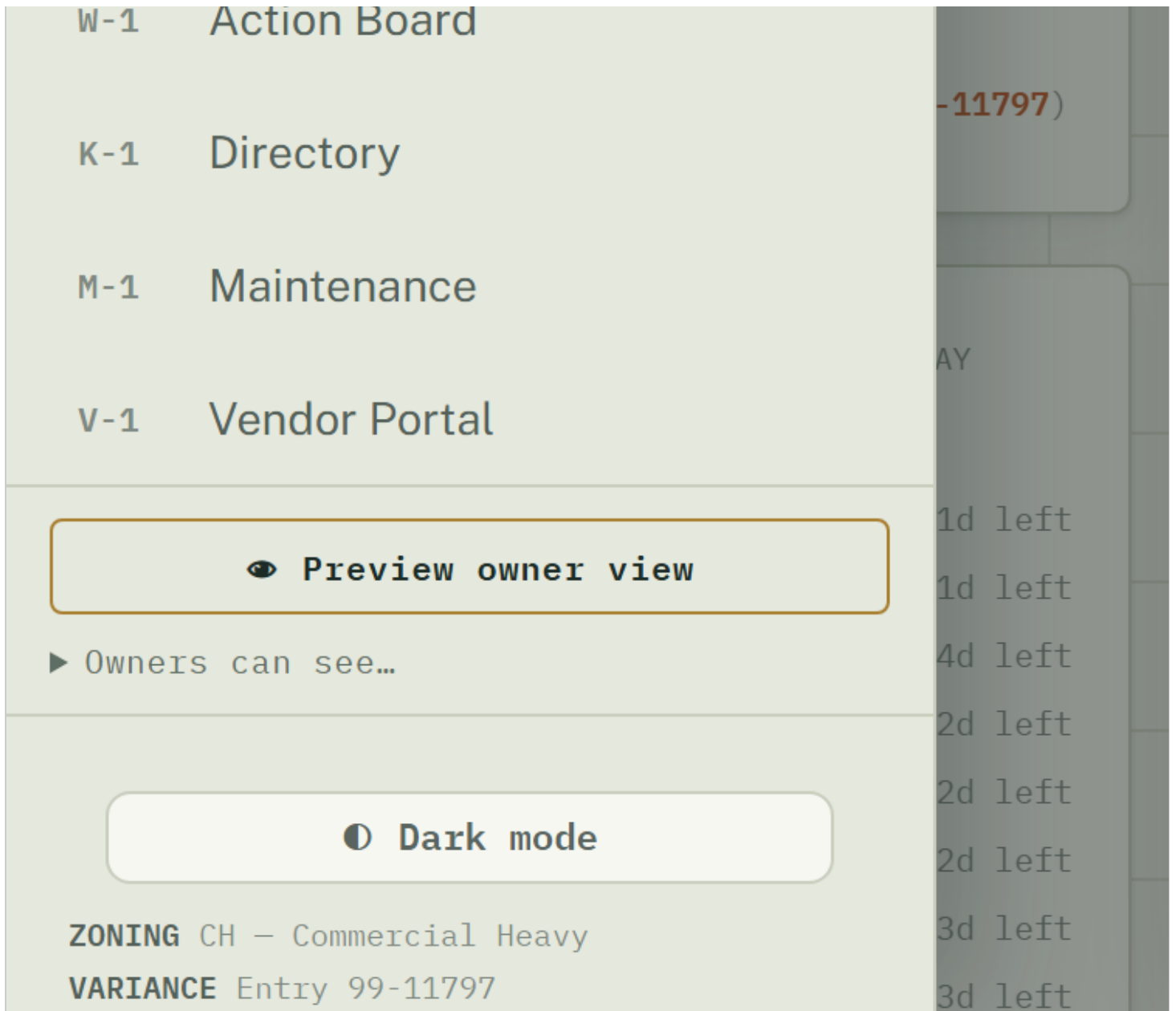
C-1 Compliance

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.

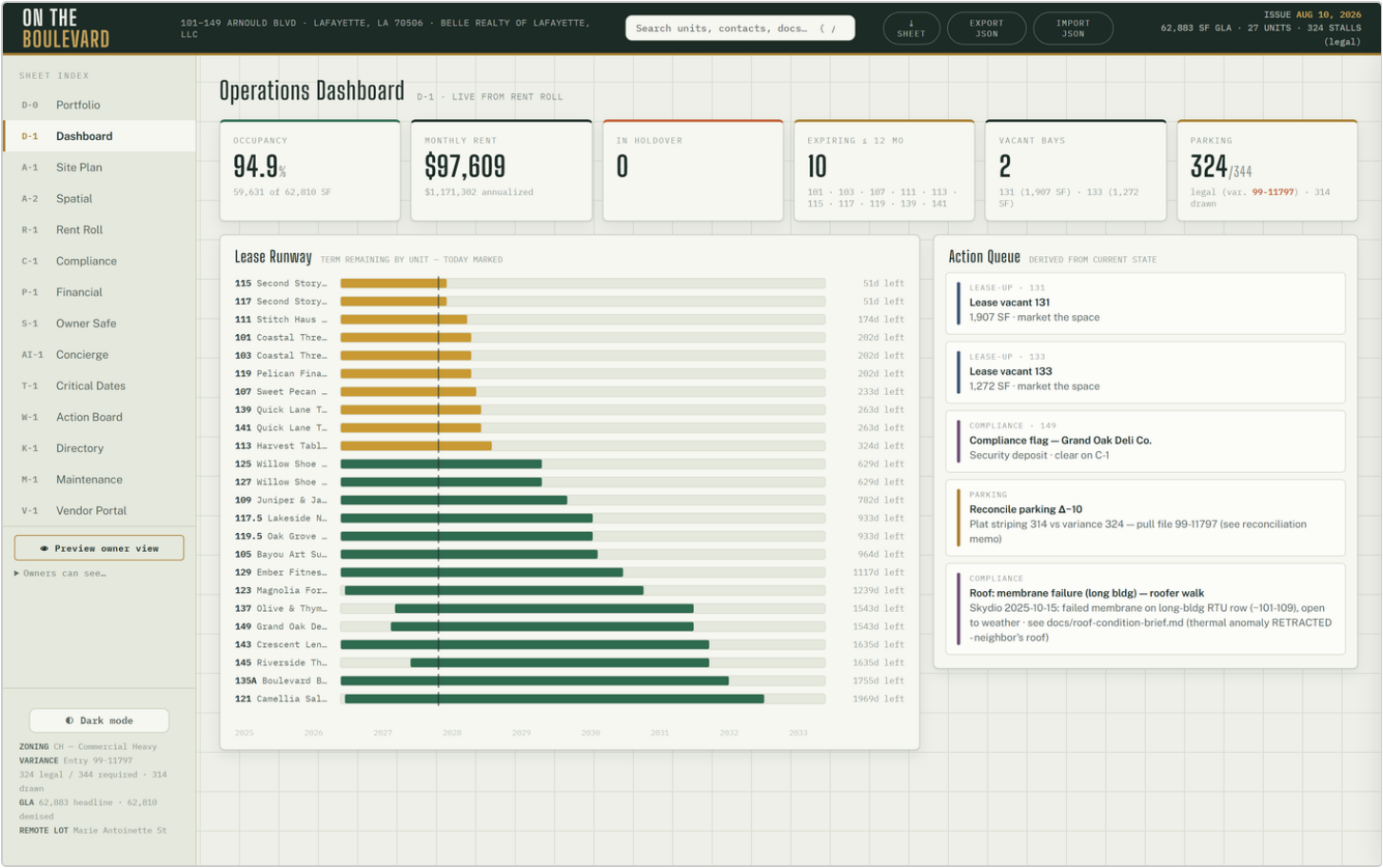
3. **AI-1 History** — the daily automated scan (11:00 UTC) may have opened a thread: a renewal window entered 180 days, a holdover appeared, occupancy dipped, the camera pipeline went quiet, a voice lead never booked, or a payment arrived that couldn't be matched. Each condition opens exactly **one** 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.
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

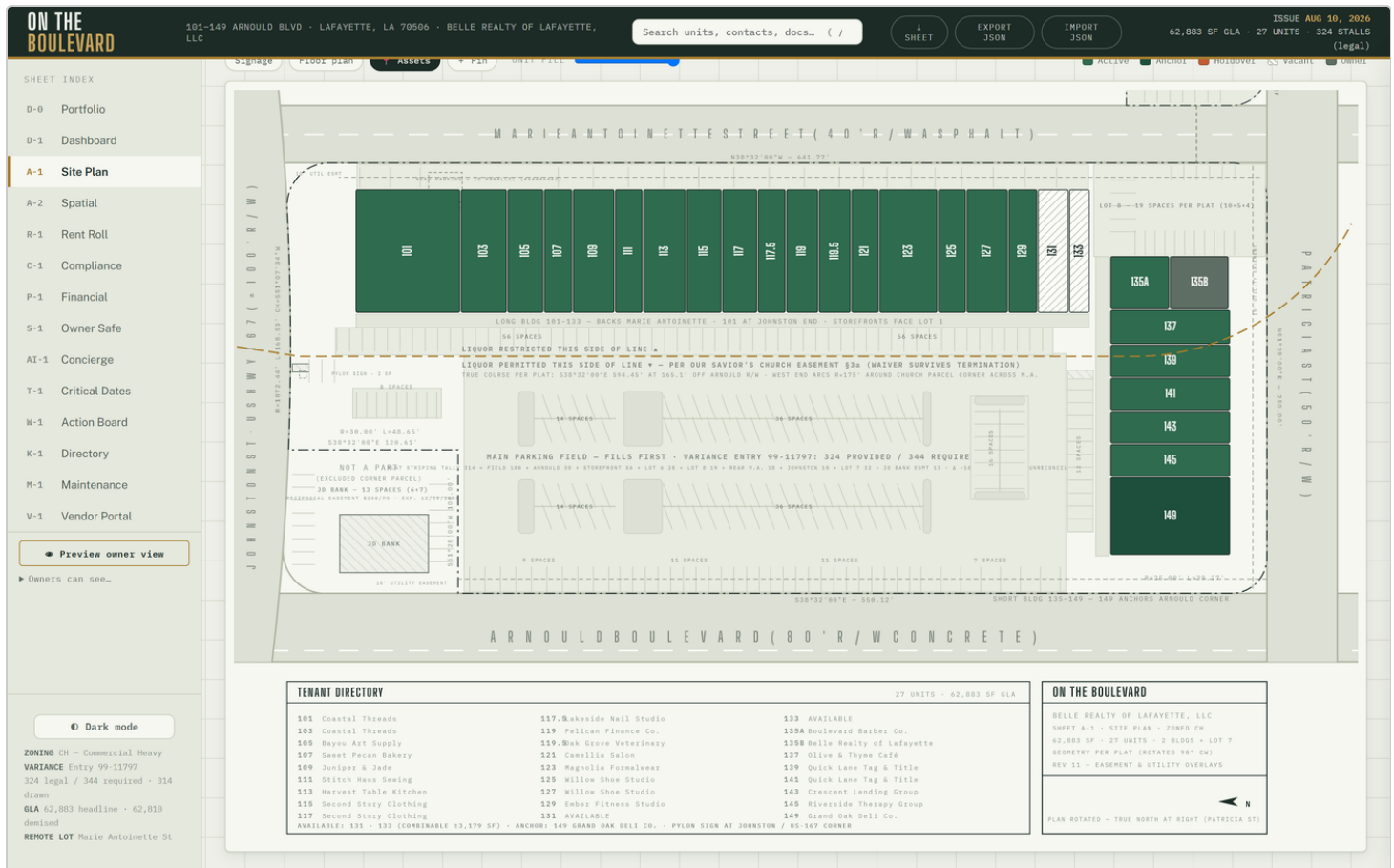
One card per property you can see: A/R outstanding (sum of positive unit balances over effective ledger entries) and open work orders, with an as-of stamp. "Open →" switches the active property. With a single property the **property switcher** stays hidden; at two or more it appears in the sidebar (see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

3.2 D-1 Dashboard



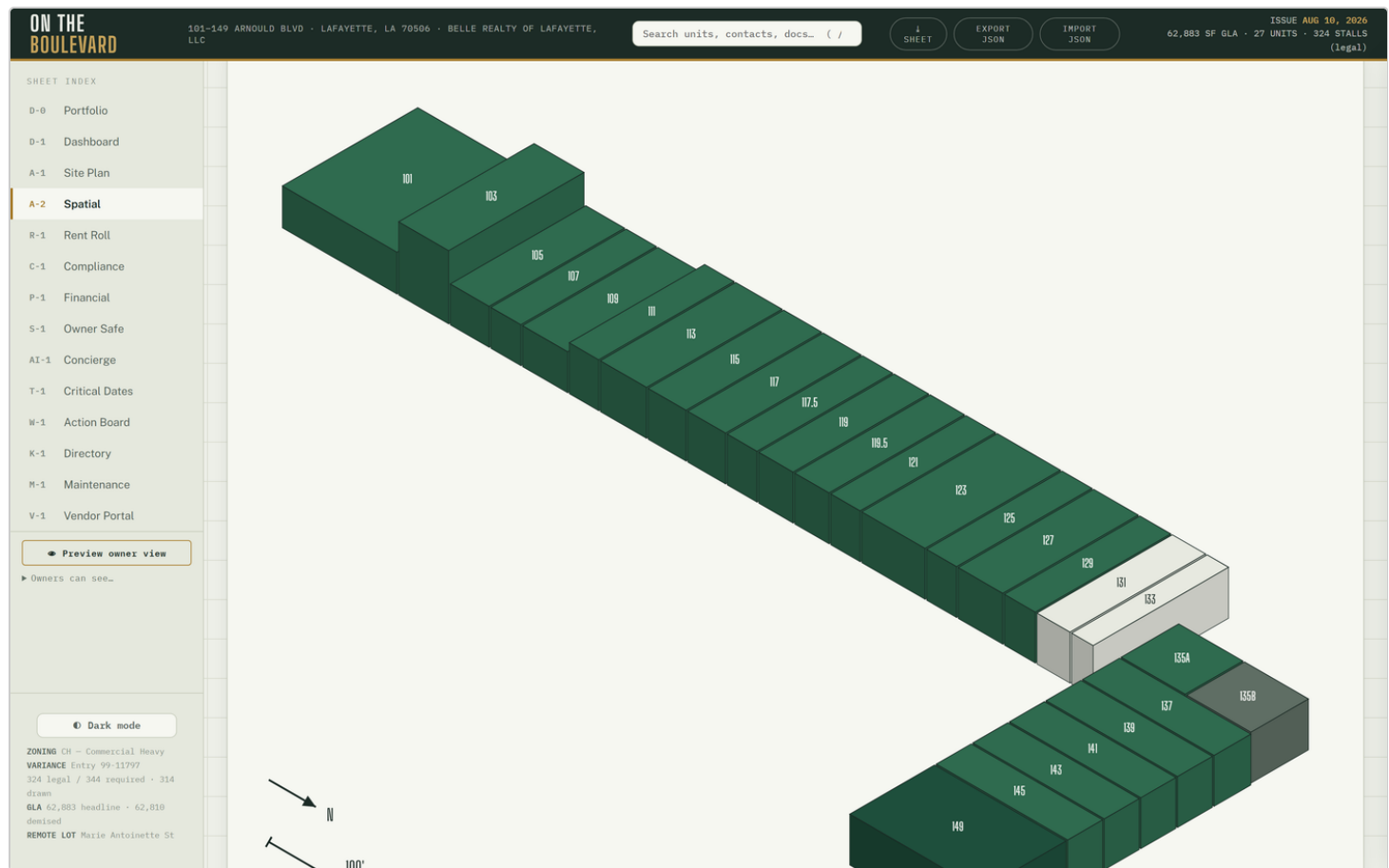
Read-only KPIs derived from live data — nothing to maintain here. Cards: occupancy/rent KPIs, parking variance (from the instruments file, not typed), **Parking Occupancy (C3)** with 7-day trend (48-hour freshness window; the as-of label shows date+time for non-today samples), **Network (UniFi)** up/down, **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), 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. **Chips** toggle overlay layers: - **Lenses:** Status / Expiry / Rent / Use / HVAC / Size — unit fills + legend. - **Parking** — the 314 drawn stalls by zone. - **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. 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
V-1 Vendor Portal	125	Willow Shoe Studio Willow Shoe Studio, LLC	1,735	17.50	2.00	0.75	1.00	21.25	\$3,072.40	Apr 30, 2028	● ACTIVE
	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

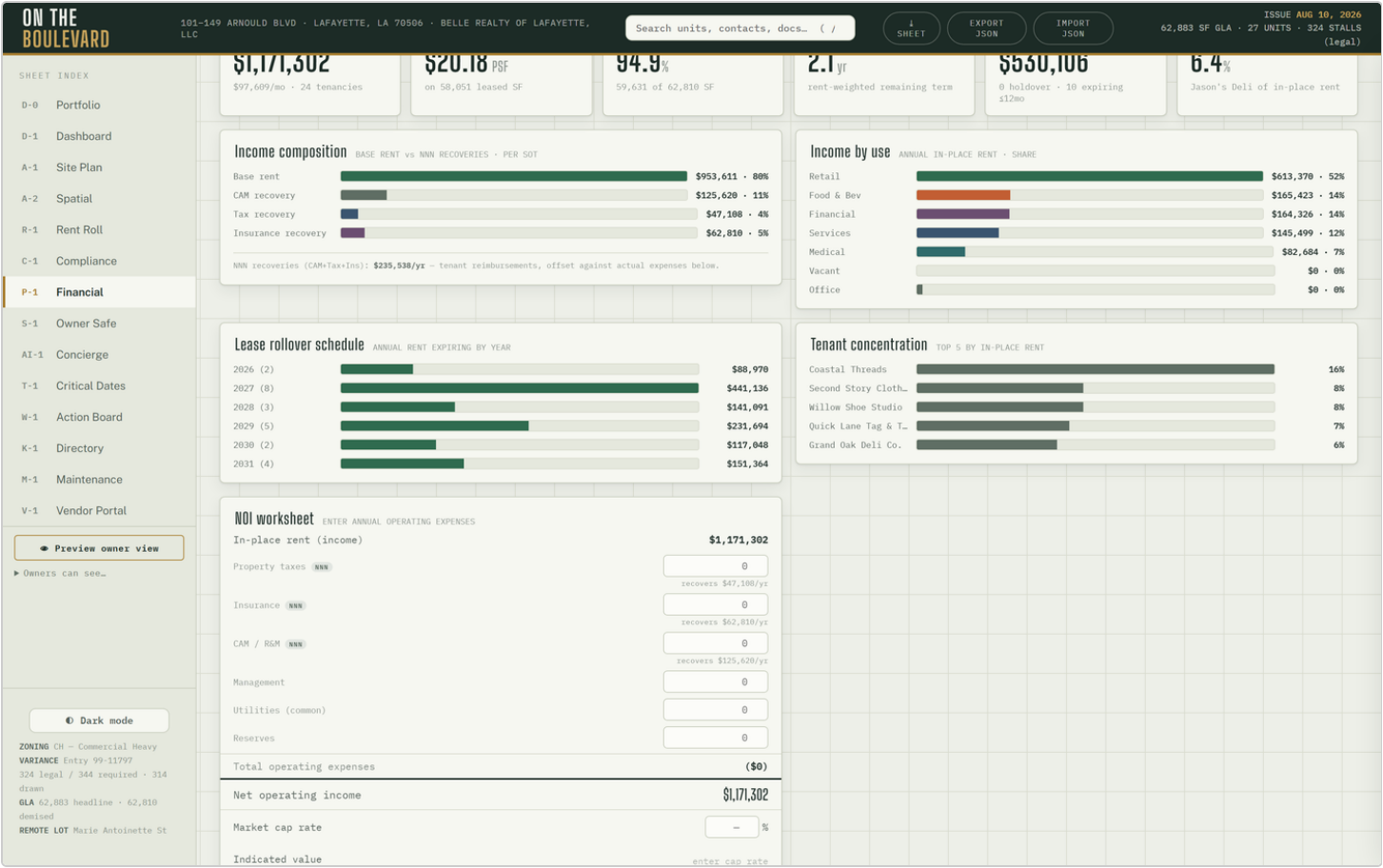
Owners can see...

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, rollover, and concentration charts; the **NOI worksheet** (enter opex → NOI → cap-rate value); **Collections & aging** (month collected-vs-charged and per-unit FIFO aging from the ledger). The Excel proforma (`npm run proforma`) is the owner-overridable model for underwriting conversations.

3.7 C-1 Compliance

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

ISSUE AUG 10, 2026

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

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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 demand REMOTE LOT Marie Antoinette St

UNIT / TENANT

101 Coastal Threads

103 Coastal Threads

105 Bayou Art Supply

107 Sweet Pecan Bakery

109 Juniper & Jade

111 Stitch Haus Sewing

113 Harvest Table Kitchen

115 Second Story Clothing

117 Second Story Clothing

117.5 Lakeside Nail Studio

119 Pelican Finance Co.

119.5 Oak Grove Veterinary

121 Camellia Salon

123 Magnolia Formalwear

125 Willow Shoe Studio

127 Willow Shoe Studio

129 Ember Fitness Studio

131 VACANT

133 VACANT

135A Boulevard Barber Co.

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

CERTIFICATE

OCCUPATIONAL

HVAC PM CON

GREASE TRAP

ROOD / ASSU

SECURITY DE

M-9 ON FILE

LAST MAINT

STORAGE APP

EXECUTED LE

ACH ON FILE

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-1 Critical Dates

ON THE BOULEVARD

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

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

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62,883 SF GLA • 27 UNITS • 324 STALLS

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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 devised

REMOTE LOT Marie Antoinette St

Sep 30

115 • Second Story Clothing lease expires

2,170 SF • \$3,707/mo

Sep 30

117 • Second Story Clothing lease expires

2,170 SF • \$3,707/mo

2027

Jan 31

111 • Stitch Haus Sewing lease expires

1,690 SF • \$2,993/mo

Feb 28

101 • Coastal Threads lease expires

6,877 SF • \$11,032/mo

Feb 28

103 • Coastal Threads lease expires

3,054 SF • \$4,899/mo

Feb 28

119 • Pelican Finance Co. lease expires

1,982 SF • \$3,510/mo

Mar 31

107 • Sweet Pecan Bakery lease expires

1,743 SF • \$3,087/mo

Apr 30

139 • Quick Lane Tag & Title lease expires

1,917 SF • \$3,395/mo

Apr 30

141 • Quick Lane Tag & Title lease expires

1,917 SF • \$3,395/mo

Jun 30

113 • Harvest Table Kitchen lease expires

2,606 SF • \$4,452/mo

2028

Apr 30

125 • Willow Shoe Studio lease expires

1,735 SF • \$3,072/mo

Apr 30

127 • Willow Shoe Studio lease expires

2,538 SF • \$4,336/mo

Sep 30

109 • Juniper & Jade lease expires

2,548 SF • \$4,349/mo

2029

Feb 28

117.5 • Lakeside Nail Studio lease expires

1,769 SF • \$3,133/mo

Feb 28

119.5 • Oak Grove Veterinary lease expires

1,974 SF • \$3,496/mo

Mar 31

105 • Bayou Art Supply lease expires

2,222 SF • \$3,796/mo

Aug 31

129 • Ember Fitness Studio lease expires

1,789 SF • \$3,168/mo

Dec 31

123 • Magnolia Formalwear lease expires

3,563 SF • \$5,716/mo

Lease expirations plus instrument deadlines (JD Bank easement end, etc.) on one timeline. Derived — nothing to maintain.

3.9 W-1 Action Board

ON THE BOULEVARD

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

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

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Owners can see...

Dark mode

ZONING CH - Commercial Heavy VARIANCE Entry 99-11797

324 legal / 344 required · 314 dram

GLA 62,883 headline · 62,810 devised

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-B1-189), 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. Card types include seeded facts (holdover, renewal, vacancy, compliance flag, covenant) and **live work-order cards** (`mr:` 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.

- **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_ (/)

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 • 62,810 devised

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

ATC 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 stats 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: go-roof reit 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 (npm 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 2004-00057697

\$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

77-0783 / 77-000784 / 77-000785

Of 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_Logo_HVAC.xlsx

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

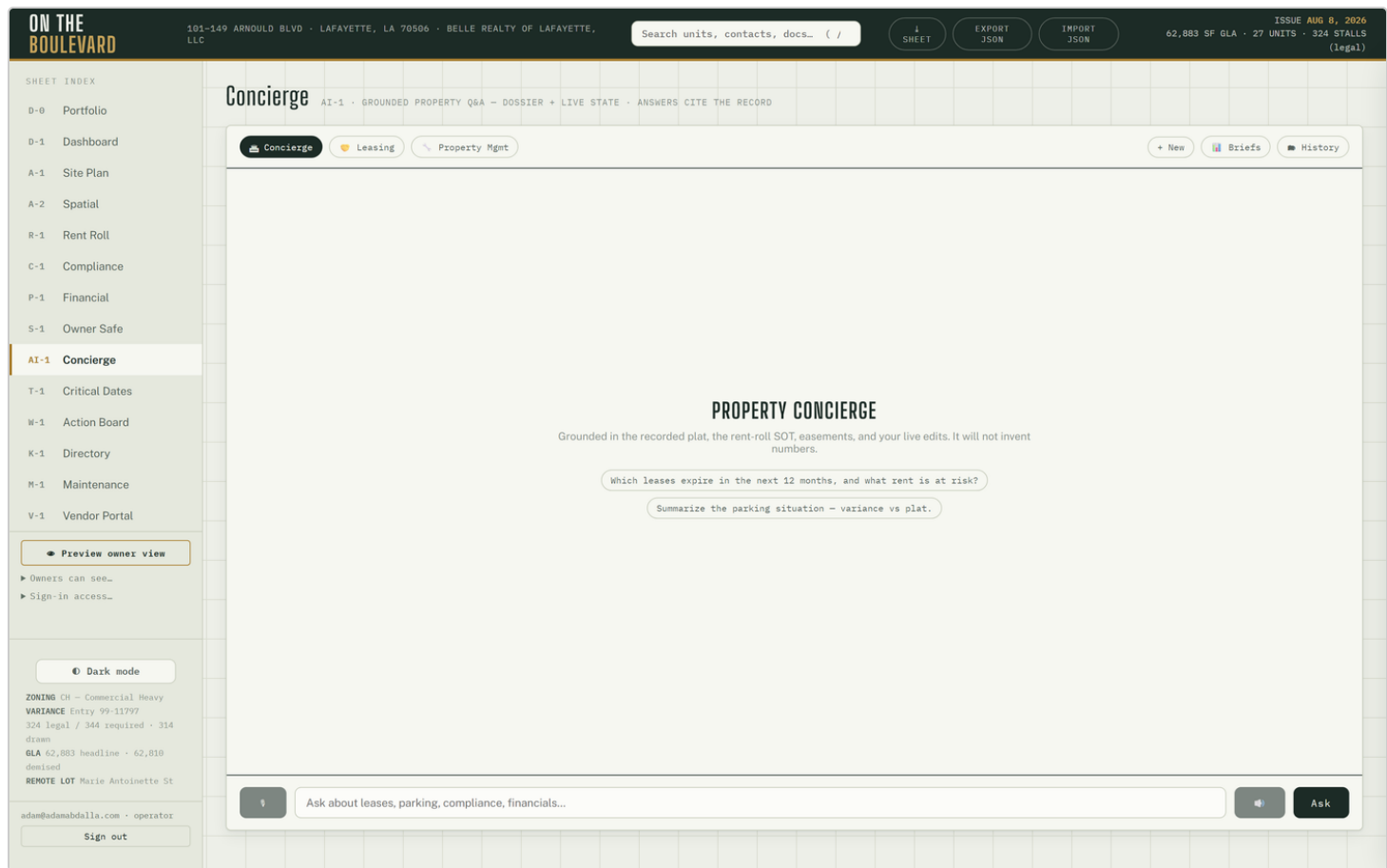
Open

Property contacts, the document register (rows can carry a real uploaded file — 📎 attach → the row's link becomes an "Open 📎 " that always serves a fresh secure URL), and the site-imagery library.

3.15 S-1 Owner Safe

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 (orangeoceanatlas.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.
 - Every call lands as a transcript thread in AI-1 History.
 - Go-live steps + secret rotation drill: `docs/a3-voice-runbook.md` .
-

Part IV — Counterparty guides

4.1 Owners

Sign in with your authorized email. You see the sheets the operator has shared (dashboard, rent roll, financials, and the Safe are typical), **read-only**. 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. 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 pack `docs/sot-2026-07/` (authority rank 1).
2. Apply the change to `src/data/units.json`.
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` (340) · `npm run build` · deploy · **grep the prod bundle for the change** · smoke the live URL. Committing is not shipping: **commits do not auto-deploy**.

6.3 Deploying

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

(CLI is logged in as orangeonyx on this machine. `.vercelignore` governs uploads — the 16MB splat + 3MB mesh ride in `public/`.)

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 vl 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); settings edits via SQL until a UI lands.
- 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

Orange Ocean Atlas — Property Onboarding Manual

Version August 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://orangeoceanatlas.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:

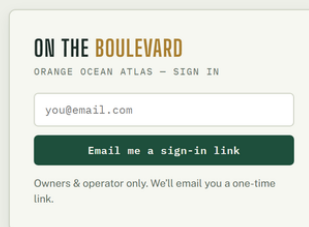
```
select p.slug, p.name, p.created_at, s.ledger_start_ym
from properties p join property_settings s on s.property_id = p.id
order by p.created_at;

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 13 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).