Three desks. One way of working.

Each person who works beside the virtual workers has a live desk made for their job. The Rep Desk runs a book of accounts and the workers on it. The Manager Desk runs the team. The Client operator Desk keeps CVW running for the company. All three share one frame, one set of parts and, where it is needed, one phone.

WHAT THIS GUIDE COVERS

The frame and the phone
The header, the rail and Me. Records slide in beside the work. One phone on every screen.

The Rep Desk
Decide what workers ask, give out work, oversee every clone, talk to customers, wrap up.

The Manager Desk
See the team, cover gaps, decide what is escalated, balance the work, coach, measure.

The Client operator Desk
Fix what a load refused, watch every worker, stop and restart them, review.

Around the desks
Off hours, calendars and modes, backups, approval limits, names and teams.

Who it is for
Sales leaders, inside sales reps, sales managers and the people who run CVW.

THE DESK FAMILY

	Rep Desk	Manager Desk	Client operator Desk
Scope	You, your accounts and the workers on them, however many.	Your team: reps, their workers and their backups.	How CVW runs for this company.
Job	Run your book. Decide what workers ask. Give out work. Go after accounts. Talk to customers.	Run the team. Cover gaps, balance work, coach, and decide what is escalated.	Keep it running: loads, rules, reviews, lessons and stopped workers.
Screens	Today, Waiting, Workers, Plan, Outreach, Messages, Contacts.	Team now, Waiting, Capacity, Coaching, Results.	Needs you, Workers now, Data, Review, Lessons.
Phone	Your Desk line, the worker lines or your own phone.	The same, with Listen and Join on any call in the team.	None. The header shows how many clones are live.
Decides	Asks on your accounts, up to your own limit. Escalates the rest.	Above a rep's limit, and who covers whom.	What the workers learn and load. Not prices.

Chat, Reference and Me sit in the same place on all three desks.

THE CVW GUIDES

Product overview
What CVW is and is worth, the workers, Sage and Tess, the desks, trust, and how to start.

The desks
Working beside the workers: the Rep, Manager and Client operator desks and the phone.

Intelligence and prospecting
Sourced profiles, news, ideal customers, list building, competitors and supply chains.

Channels and compliance
Addresses, lines and company numbers, calls and texts, contact rules and countries.

Quality and the learning loop
Scores, debriefs, the coach, review, lessons, tests, the live watch and measured decisions.

Technical architecture
For IT, security and architecture teams: how CVW is built and run.

Industrial sales
The made-up Northcott Fluid Power example: a manufacturer and its distributors.

B2B inside sales
The made-up Veridane example: a software company selling to banks and insurers.

Every guide is at **corvair.ai/cvw**. Screens are product designs with made-up data.

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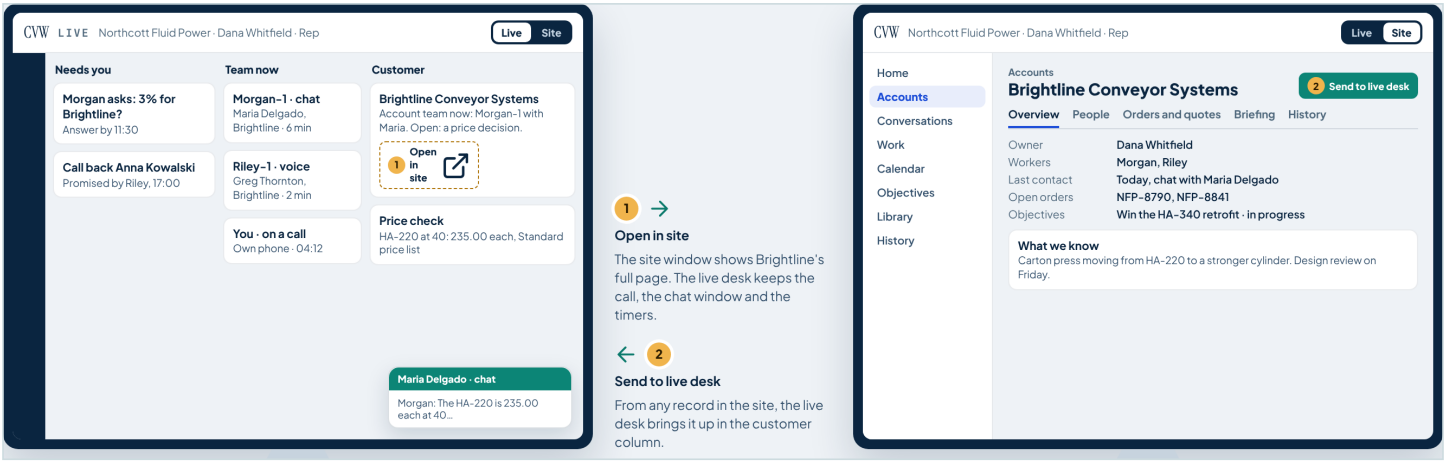
A live desk and a site for every role.

Every role works from two windows: a live desk for the work happening now, and a site with everything else as pages. They are separate browser windows, often on two screens. With one screen, the site opens as a tab.



The live desk and the site side by side, with Open in site and Send to live desk, shown with the made-up Northcott example. Product design with made-up data.

The live desk never turns into a page. Records open inside it, beside the work. **Open in site** shows a record's full page in the site window, and **Send to live desk** brings a site record up in the live desk. Calls, chat windows and timers live only in the live desk. A site page shows a ringing call or a waiting chat, with Back to live desk.

A SEAT FOR EACH ROLE

Seat	Its live desk	What it is for
Rep	The Rep Desk	Their book: accounts, the workers on them, asks, calls and messages.
Manager	The Manager Desk	The team: reps, their workers and backups, escalated asks and coaching.
Client operator	The Client operator Desk	Files, rules, reviews, lessons and workers, with Sage and Tess.
Client admin	Setup live	Requests, who decides, how ready the company is to sell, today's changes with undo, and the stop switch.
Engineer	Workbench live	The Corvair engineer or partner: releases and tests.
Platform operator	Platform live	Corvair: services, tenants, jobs and the stop switch.

A person with several roles picks the role once, and both windows follow. An agency has an agency rep, an agency manager and an agency engineer.

SHARED PAGES

Accounts · Contacts · Catalogue · Price book · Library · Competitors · Glossary · Calendar

The same page in every role's site, and Reference in every live desk. Everyone can look things up. Only the role that manages a page sees its edit controls, and each page says who manages it.

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One frame for every desk. Everything opens beside the work.

The three desks are one build with a different scope, so what you learn on one works on the others.

THE HEADER

The seat · Find, or ask Sage · Ctrl K · How you take calls · Your line · Live and Site · Light or dark · The bell · You, with your status

THE RAIL

A rail of screens with counts, then Chat and Reference, then Me. Each screen does one job. Its title row holds its sub-pages and its main action. Every icon has a tooltip with its name and its keys:

G then T opens Today.

RECORDS SLIDE IN

An account, a person, a conversation, an ask, a piece of work, an objective, a meeting, a worker, a document, a competitor, a price, Sage's brief or the day's wins slides in from the right, up to eight deep, with Back. Nothing covers anything. Hover a name for its card, with Briefing and copy. Each record has Open in site.

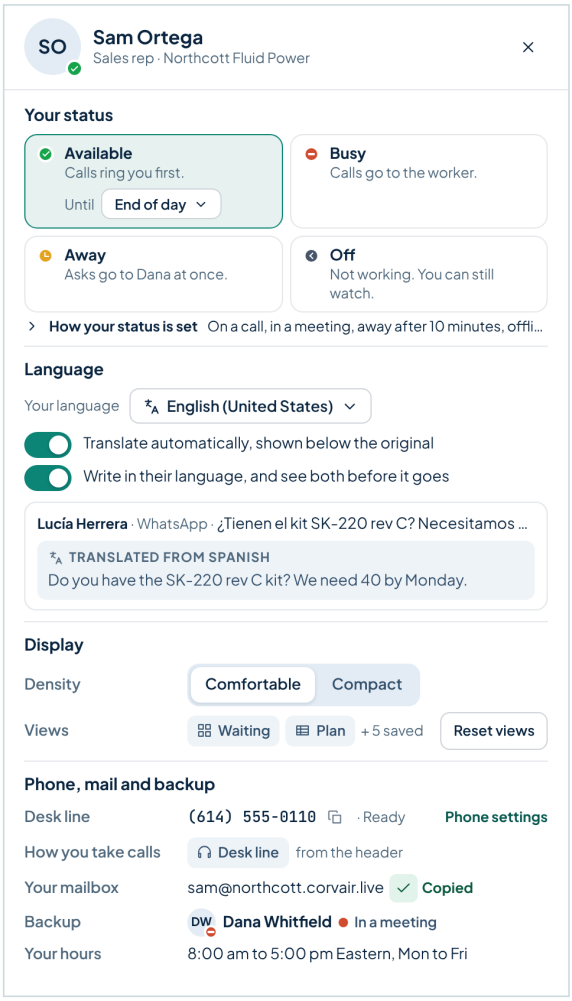
STATUS ON EVERY AVATAR

Available · Busy, on a call, in a meeting · Away · Off · Offline

Wherever a person or a worker appears, a status mark and its word show who is free, live or not working. Off covers after hours, weekends and holidays.

EVERYWHERE THE SAME

Every list switches between cards and a table (V). Every number, email and address has a copy button. Workers are as many as the company needs: lists show five, then "+7".



Me: status, language and translation, display, phone and backup, shown with the made-up Northcott example. Product design with made-up data.

ONE DESK, ANY REP

The role pack holds a profile for each kind of rep: where they land, the default views, the call guide, the outcomes, the facts to capture and the tools on the call screen. The screens, the phone, who may decide what, the checks before contact and the country rules stay the same.

Industrial · key accounts
Lands on Waiting: price and stock decisions first.

B2B · volume leads
Lands on Outreach, with the next person ready.

B2B · customer success
Lands on Contacts › Accounts, renewals due first.

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One phone, on every screen.

The phone lives in the header of the Rep Desk and the Manager Desk and runs in the browser, on Telnyx. The ring, the call bar and the call stay in the live desk window, whichever screen is open.

YOUR LINE, AND WHAT IT IS DOING NOW

Ready · Ringing · Laura Chen · On a call · 4:12 · On hold · 1:05 · Phone not connected · On your own phone · 2:10

The line chip beside How you take calls shows only what the line is doing. Not connected: calls go to the worker until the browser phone is ready.

HOW YOU TAKE CALLS: A TOGGLE IN THE HEADER

Desk line

Calls to your Desk number ring you in this window, and you call out from it. Shown when the company has given you a Desk number.

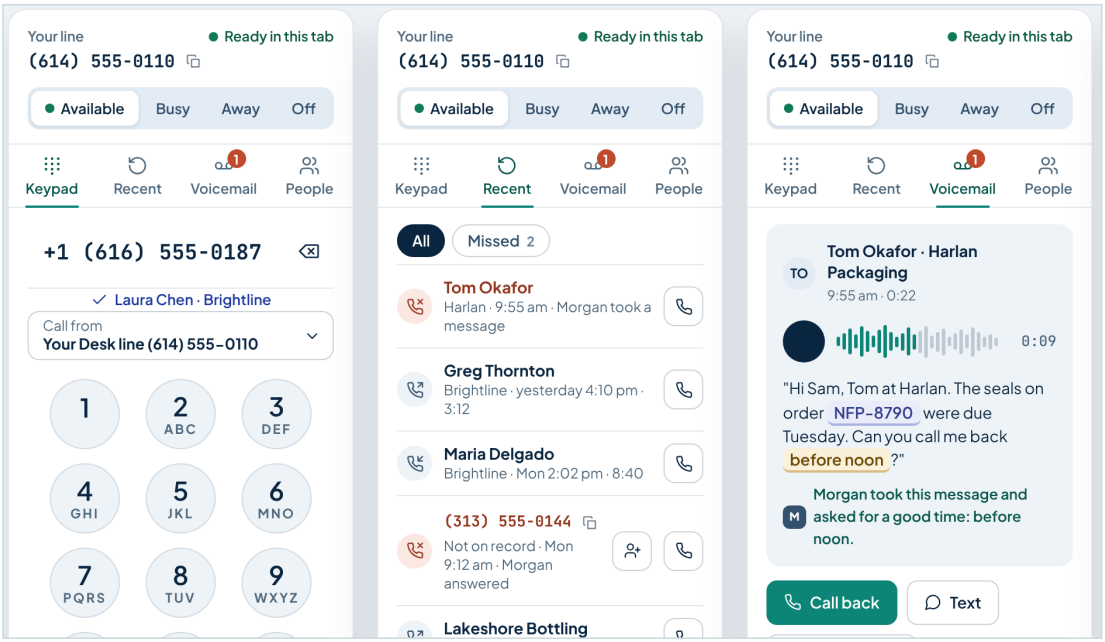
Worker lines

You call and text from each account's worker line, so customers see the number they know. Calls to those lines reach the worker first, who can put them through to you.

Own phone

You take calls on a mobile or a company line, and nothing rings in the browser. Say when you are on a call so the team sees it, then log who with and what happened.

A change takes effect at once, and the team sees it with your status. During a ring or a call the toggle is greyed out.



The phone panel: the keypad, where Call from lists every line with its number, recent calls, and voicemail with the worker's note, shown with the made-up Northcott example. Product design with made-up data.

TEN RING TONES

- Marimba
- Glass
- Felt
- Soft pulse
- Drop
- **Kalimba · default**
- Vibes
- Harp
- Soft keys
- Music box

Each person picks their own, with the ring volume, microphone and speaker.

Call from

Your Desk line, each worker's line and the company numbers, each with its number. The line you choose is the line you call from.

The call bar and transfer

Under the header on every screen while a call is live: Mute, Hold, Keypad for tones, Transfer to the account's worker, which carries on with a summary, or to a person, and End call.

Your own phone

Press I'm on a call, choose who with, then log what happened. Own phone has none of ring first, the live transcript, cards brought forward, recording, transfer, Listen and Join.

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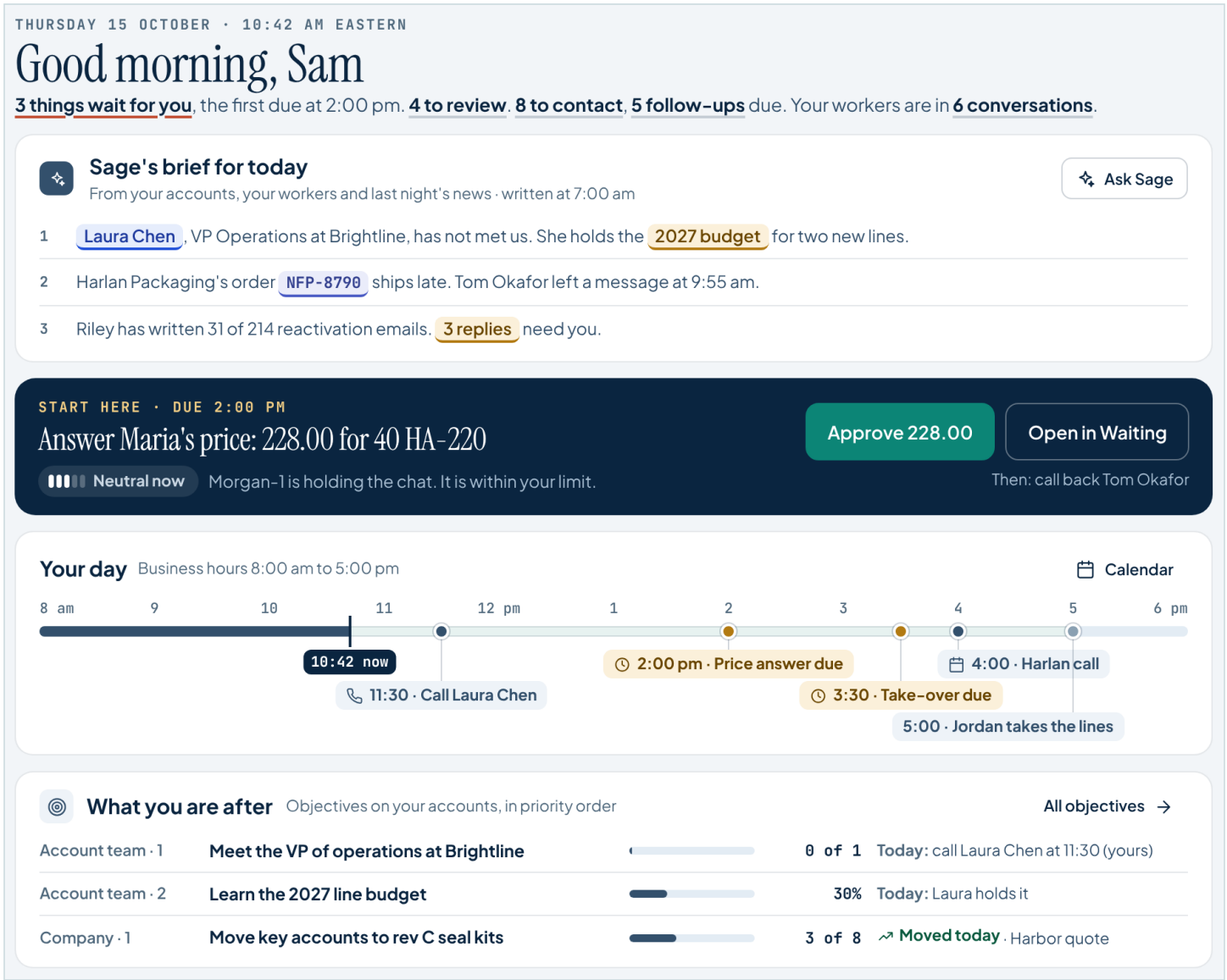
Today.
What to do first, and your day.

The Rep Desk opens on Today: what waits and when, Sage's brief, what to do first, and your day.



Today for Sam Ortega, shown with the made-up Northcott example. Product design with made-up data.

Start here

The one thing to do first, with its action on the card: "Answer Maria's price: 228.00 for 40 HA-220. It is within your limit." Then what comes next.

Your day

Your calendar as blocks, the decisions and meetings due, a now line, and each worker's modes through the day. Press a marker and it slides in.

Your workers and wins

Each worker on your accounts and what its clones are doing. Wins for today or 7 days, each result Reported by a worker or Confirmed by your systems.

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Waiting.
Decide, or escalate.

Workers ask; the person whose account it is decides. Waiting lists the asks by due time, then conversations to review and work that came back to you, with one ask in focus.

THE DECISION BAR

- Approve A
- Offer something else O
- Decline
- Escalate E
- Next J

IN FOCUS

Quote
what was quoted

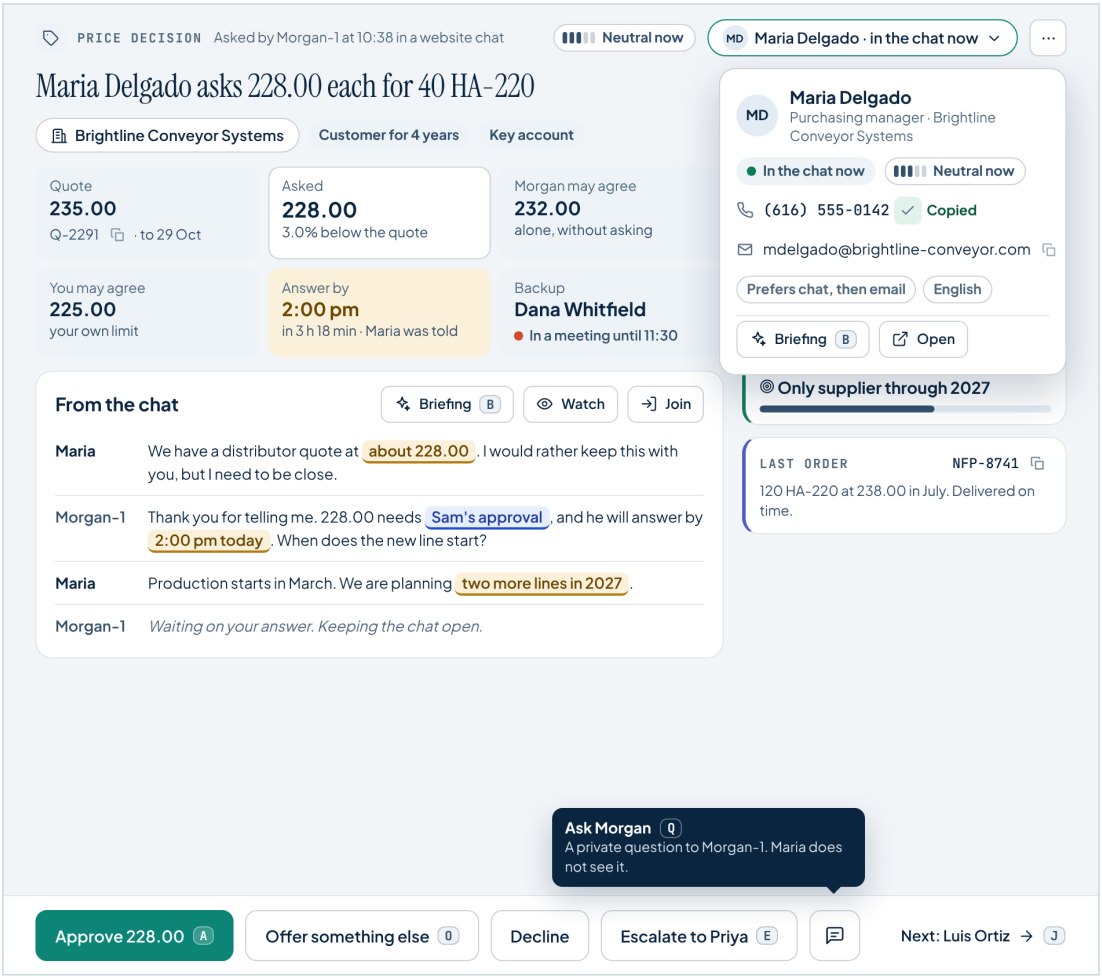
Asked
the figure, and how far below

Worker may agree
alone, without asking

You may agree
your own limit

Answer by
and what the customer was told

Backup
who gets it if you are away



Maria Delgado's price ask in focus: the quote, what she asked, what Morgan may agree alone, what Sam may agree, when she must hear, the backup and the chat, shown with the made-up Northcott example. Product design with made-up data.

Below your own limit, or away

Escalate sends the ask to your manager with the facts and your note, and it keeps its due time. When you are Away or Off, the ask goes to your backup at once.

Nobody answers in time

Sage reminds you, then your backup. Silence is never a yes. Nobody types a price: the worker tells the customer and revises the quote, checking every line again.

To review, and back to you

Flagged conversations and debrief changes waiting for you. Work a worker could not do, such as a call to someone who asked not to be called, with Email instead or Give to.

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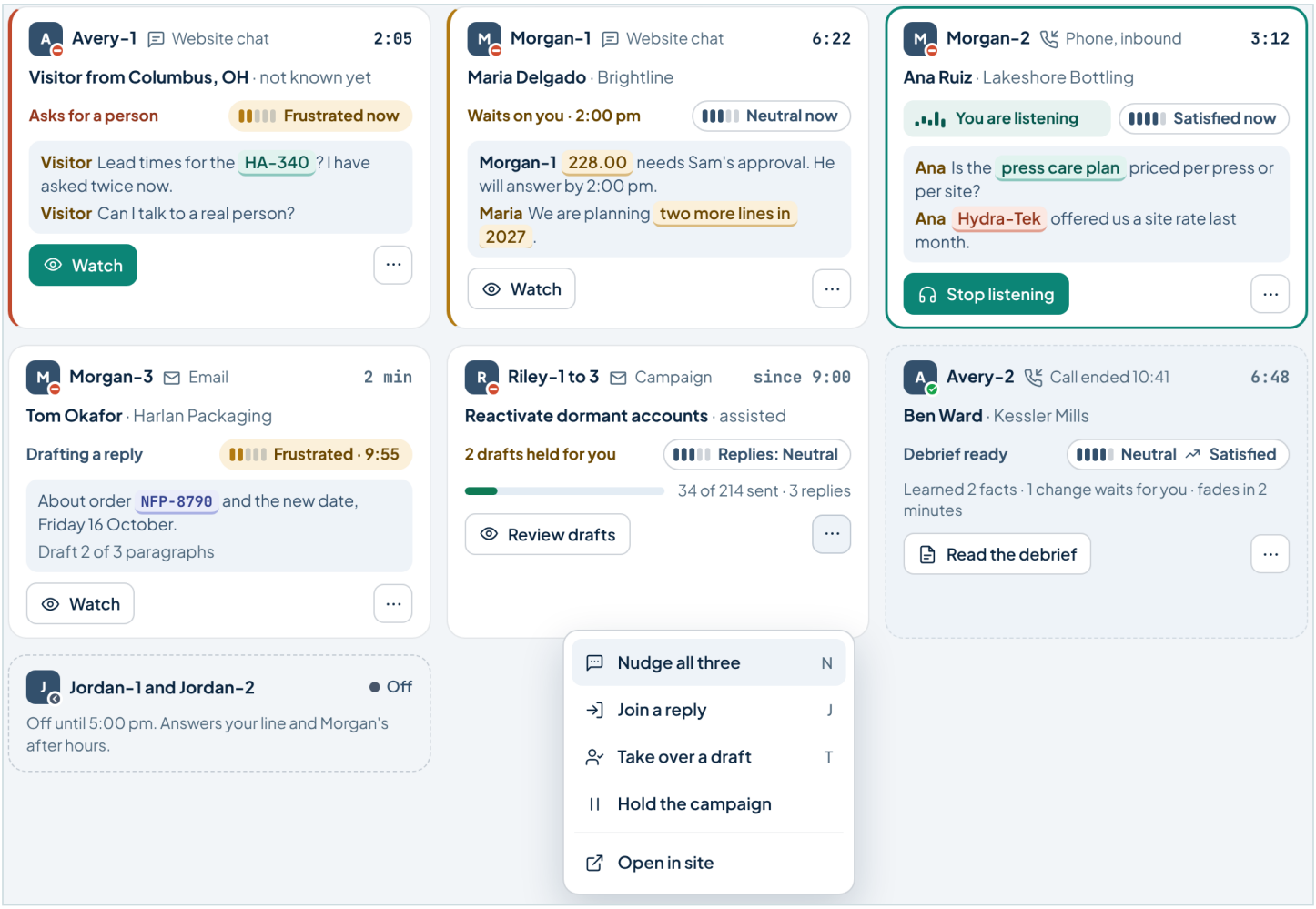
Workers.
Oversee every clone at work.

Lanes show each worker with its clones and what is next. The live wall shows every clone at work.



The live wall of every clone on Sam's accounts, with a campaign's menu open, shown with the made-up Northcott example. Product design with made-up data.

Watch
See the conversation as it happens, with the briefing the clone has.

Listen
Hear a call. It needs the recording notice; the customer cannot hear you.

Nudge
A private note the worker uses in its next reply. The customer does not see it.

Join
Reply beside the worker in the same conversation, in your own name.

Take over
The conversation is yours. The worker steps back and waits.

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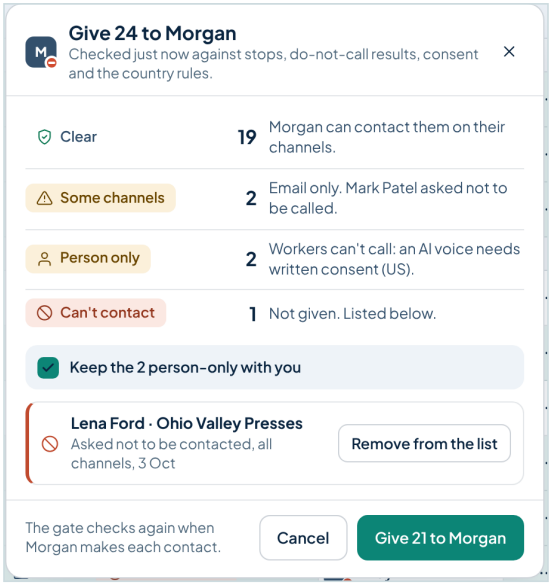
Plan.
Give out work, checked first.

Plan holds the work you give out and the work you go after. Tick many rows, or drag them onto a name, and every person on the work is checked before a worker takes it.

Work	Everything to do, by due time. Give to a worker or a person, or Let Sage choose. Change the due time, link to an objective, or hold.
Objectives	Company, account team and customer objectives, with progress, what moved and what is next. One with nothing planned says so, with Plan work.
Follow-ups	Accounts that have gone longer than their rhythm.
Leads	New, working, qualified, with a rep, or not now.
Campaigns and lists	Personal campaigns, such as “Key account check-ins”: a list rebuilt from rules every Monday, worked in steps by you and your workers. Combine lists, find duplicates, split them between workers.



Giving 24 pieces of work to Morgan: 19 clear, 2 email only, 2 person only, 1 that cannot be contacted, shown with the made-up Northcott example. Product design with made-up data.

EACH PERSON ON THE WORK GETS ONE RESULT

Clear
The worker can contact them on their channels.

Some channels
Only some channels, for example email only: they asked not to be called.

Person only
Workers may not contact them this way, for example an AI voice call needs written consent in the US.

Can't contact
Not given. Listed by name, with Remove from the list.

Waiting for a check
A do-not-call check is due first. It is given when the check comes back.

“Keep the person-only ones with you” keeps those with the rep. The checks run again each time the worker makes contact, so a stop given in the meantime is kept.

GIVE OUT WORK IN BATCHES

Tick many rows
X ticks a row and Shift ticks a range. The bar above the table gives the ticked rows out, changes their due time or links them to an objective.

Drag onto a name
Each holder sits above the table with their load: you, your backup and each worker. Drop ticked rows on one, and the check runs first.

Let Sage choose
Sage gives each row to the worker that is free and may contact the person. Rows with no home are listed first.

The contact rules in full: **Channels and compliance**

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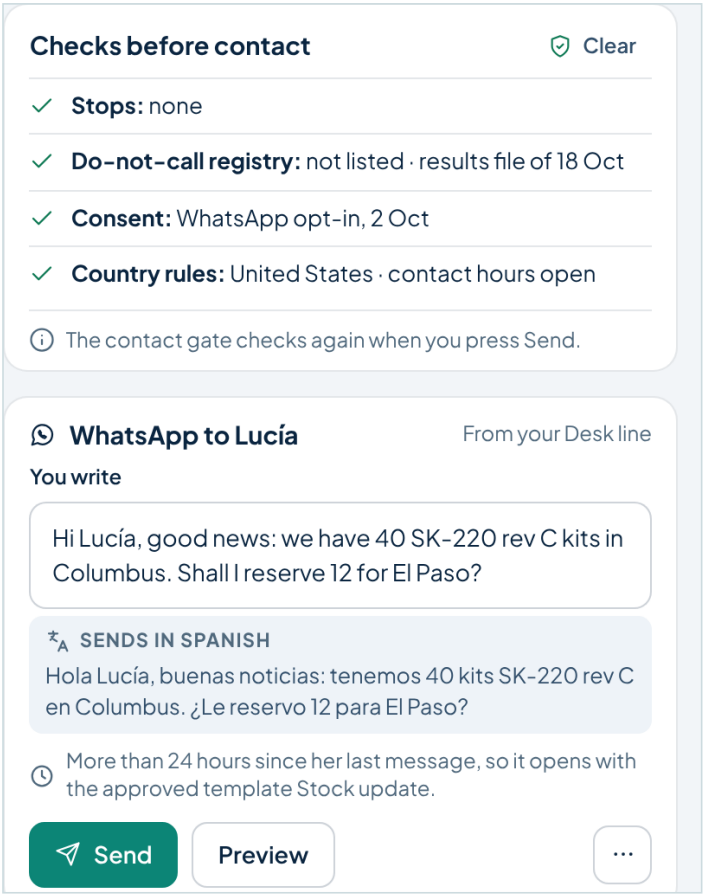
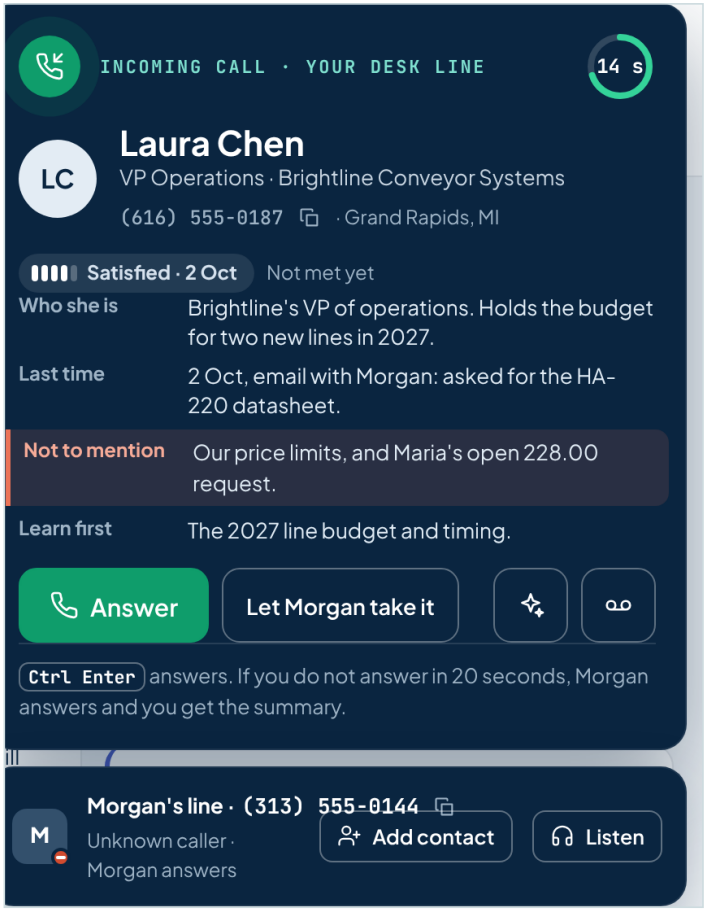
Outreach.
Each person, their way.

Outreach lists who to contact today, by each person's preferred channel and time, after the checks. Each one opens with a short briefing and how to reach them.



Lucía Herrera next on the list: the checks before contact, and a WhatsApp written in English that sends in Spanish, shown with the made-up Northcott example. Product design with made-up data.



The ring card, over any screen, with who is calling and what to know first, shown with the made-up Northcott example. Product design with made-up data.

BEFORE YOU PRESS SEND

Stops, the do-not-call registry, consent and the country's rules, with contact hours open where they are. The checks run again when you press Send.

IN THEIR LANGUAGE, ON THEIR CHANNEL

You write in yours, and see it as it will be sent, in theirs. Preferred channel, time and language come first, and "Prefers a person" when they said so.

WHEN THE PHONE RINGS

The ring card shows who is calling, their account, the mood last time, who they are, what not to mention and what to learn first.

Answer
Ctrl Enter. The call screen opens with the account beside it.

Let Morgan take it
The account's worker answers, and you get the summary.

Voicemail
The worker takes a message and a good time to call back.

No answer in 20 seconds
The worker answers, as if you had pressed Let Morgan take it.

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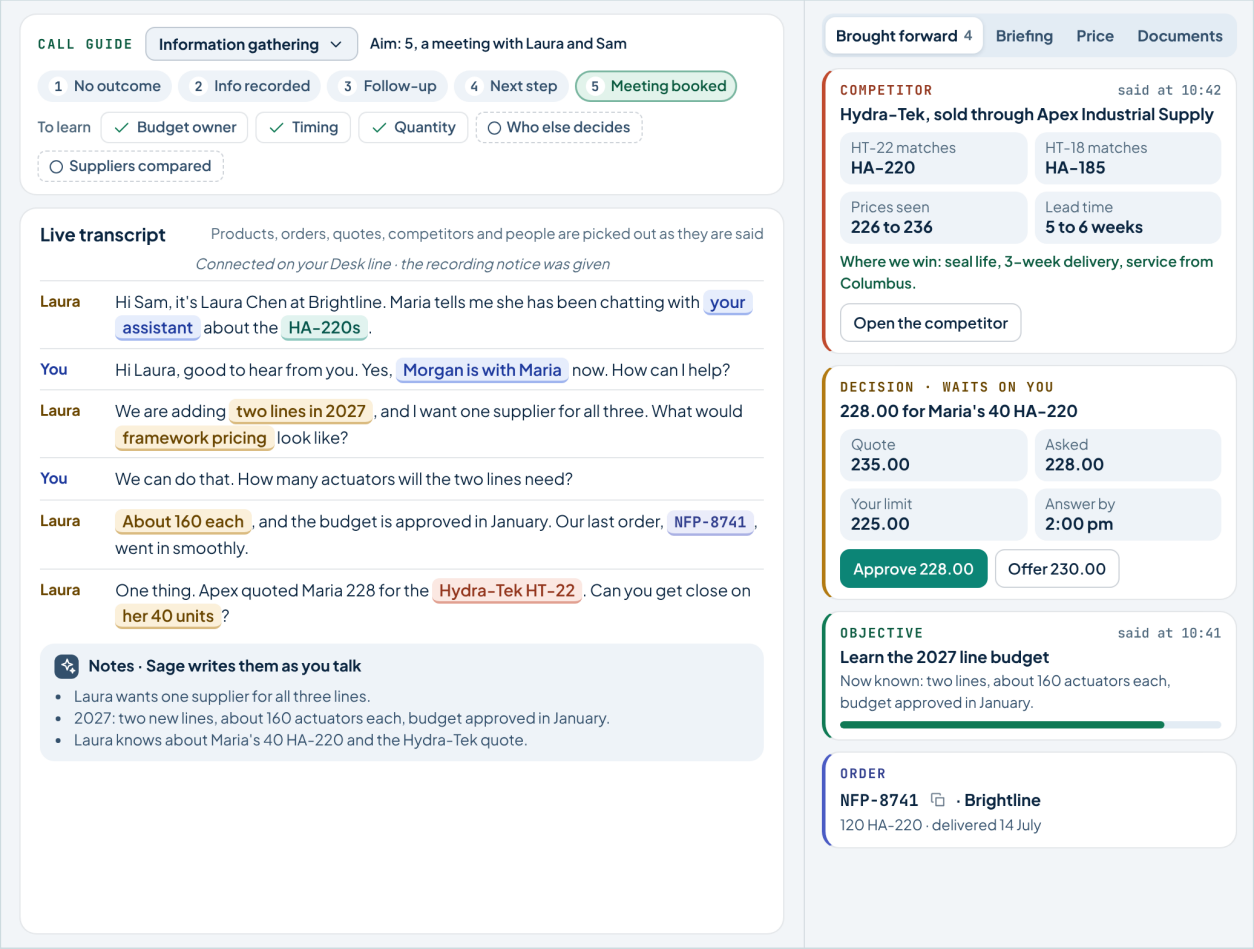
On a call, and after it.

The call guide, the live transcript, Sage's notes and a card for each thing mentioned. Then a wrap-up, and the next person.



Laura Chen's call, with products, quotes, competitors and people picked out as they are said, shown with the made-up Northcott example. Product design with made-up data.

Brought forward

A card for each thing mentioned, matched to records CVW holds: the competitor and where we win, the decision waiting on you, the objective moving, the order. Reference opens beside the call.

Wrap-up

Your outcome on the call guide's ladder, and next steps, each to you or a worker, beside Sage's debrief and what moved. Save, and the next person comes up.

Briefing before, debrief after

The briefing is one key away, B, before any contact: internal, each line confirmed, reported or assumed, with what not to mention. After it, the debrief.

The debrief and the learning loop: **Quality and the learning loop**

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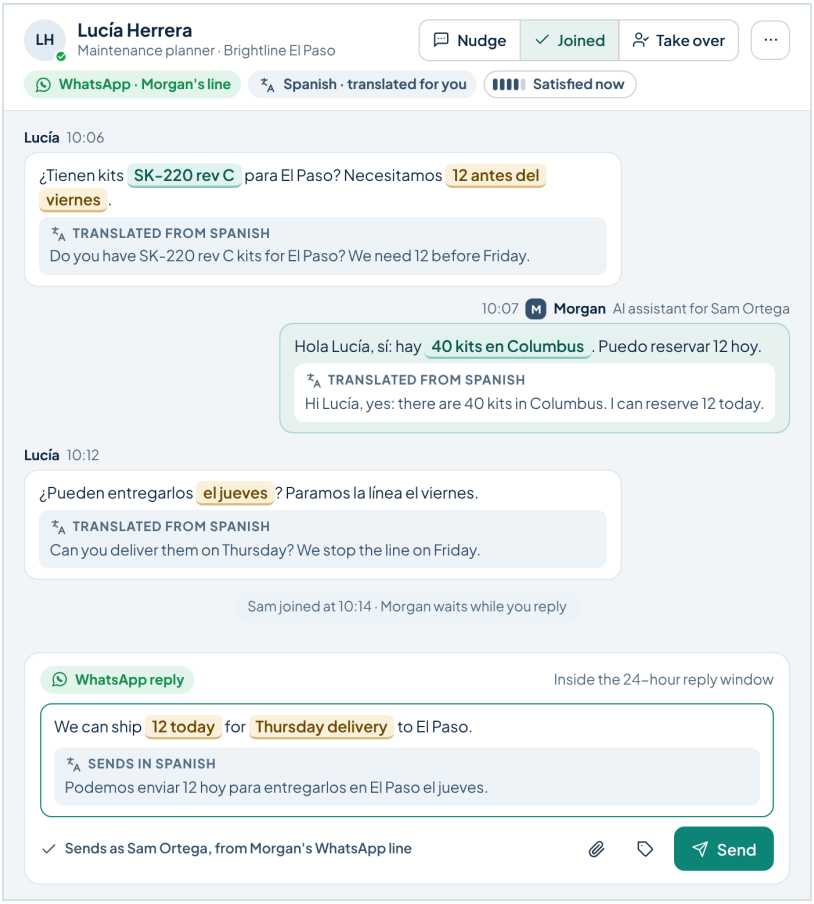
Messages, mail and chat. In each person's language.

Customer conversations on every channel, a mailbox for each person and each worker, and the team's own chat, all on the desk.



A WhatsApp conversation with Lucía Herrera in Spanish, each message translated below, and Sam's reply that sends in Spanish, shown with the made-up Northcott example. Product design with made-up data.

Messages	The conversations you hold, or that came to your line, on chat, email, text and WhatsApp. Join a worker's conversation; it waits while you reply.
Translated	The customer's words in theirs, with yours directly below. You write in your language, and see both before it goes.
Sends as	Every reply box says who it sends as, and from which line: "Sends as Sam Ortega, from Morgan's WhatsApp line".
Their details	Beside the thread: mood, preferred channel, language, local time, how to reach them, the stock asked about, the last order and the account team.

Mail

A mailbox for every person, such as sam@northcott.corvair.live, beside each worker's mailbox with its state and unread count.

Drafts held for you

In assisted mode a worker holds its drafts for you: Approve and send (A), Edit, Send back with a note, or Discard. It sends from the worker's own address.

Chat

Team channels, and one-to-one chat with people, workers and Sage. Share a record. Everyone shows their status. Customers never see this chat.

Addresses, lines and translation in full: **Channels and compliance**

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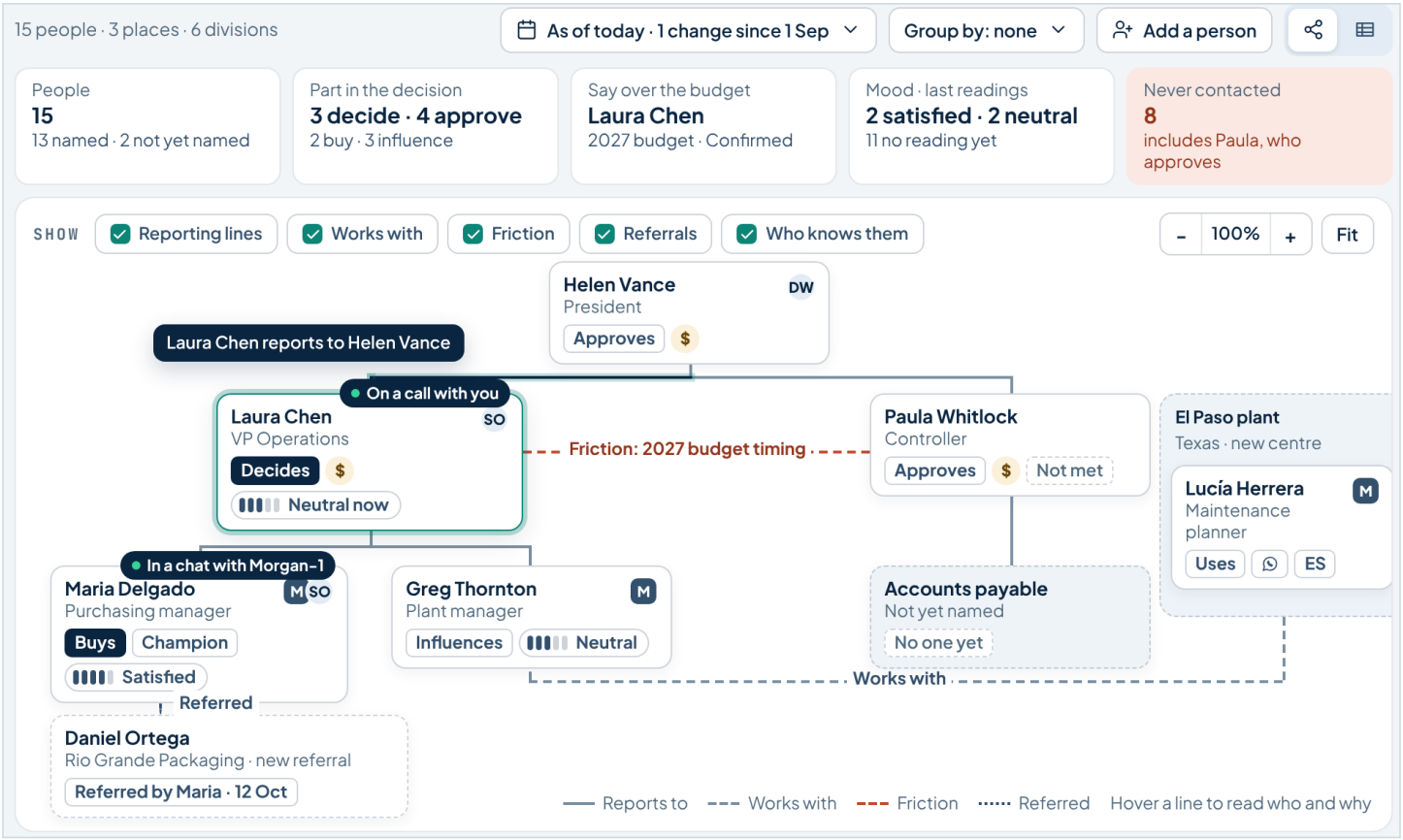
Contacts and the account view. Who is who, and what is happening.

Contacts holds your people, your accounts and the referrals your customers give. An account opens in the desk with everything a rep needs before a call.



Brightline's people map: who reports to whom, who works with whom, a point of friction, a referral, and who decides and approves, shown with the made-up Northcott example. Product design with made-up data.

People and referrals

Favourites, new referrals and A to Z. "Referred by Maria Delgado. May use Maria's name: yes." Ask for an introduction, or give it to a worker.

Accounts and their rhythm

Each account's worker, how often it should hear from us, the next step, the mood of the last conversation, and who is live with it now.

Overview

Objectives, what is open with Approve in place, who decides, from last time, latest news, health, rhythm, orders this year against last, and mood over 90 days.

People map

Who decides, approves, buys, influences and uses. Who is never contacted, and our side this month: who on the team knows whom.

Activity and intelligence

Orders and quotes, conversations, our team, and news and research, each with its source and whether it is reported or confirmed.

Briefing and Companies

The briefing a worker gets before a contact, and the companies the account owns, sells to or buys from.

Profiles, research and the people map: **Intelligence and prospecting**

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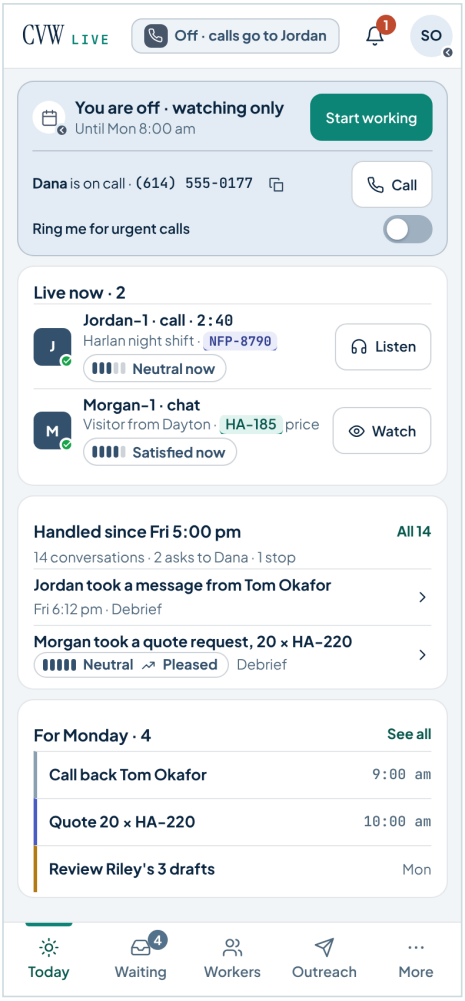
Off hours, and calendars. Watch without working.

A rep who is off can still see the desk, on a computer or a phone: what is live, what was handled, and what waits for the next working day.



Off hours on a phone: live now, handled since Friday, and for Monday, shown with the made-up Northcott example. Product design with made-up data.

You are off	Watching only, until the next working time. The header says who your calls go to, and who is on call, with their number to copy or call.
Ring me for urgent calls	Off by default. Urgent means the customer says so, a stop, or a complaint.
Live now	The clones at work on your accounts, each with Listen or Watch, and its mood now.
Handled while you were off	Each conversation since you stopped, with its debrief: messages taken, quote requests, decisions your backup made.
For the next working day	Callbacks, quotes, drafts to review and meetings, each with its time. Days off ahead: the country's holidays and your time off, with your backup named.

ASSISTED, AUTOMATED OR PAUSED, BY THE HOUR

MODE

Assisted

A person approves what the worker sends. Usual in business hours.

MODE

Automated

The worker sends on its own within its limits. After hours: list prices only, and nothing promised before the next working day.

MODE

Paused

The worker starts nothing new. For a team that wants quiet weekends.

CALENDAR

Backups and time away

Each person names a backup. Time away and on-call shifts are on the calendar. One worker can answer every rep's line from 5:00 pm.

THE CALENDAR EVERY WORKER READS

Public holidays

Each country's holidays load from official pages, with their sources, and stay current.

Company closures

Days the company is closed. Workers count business days around them.

Hours and time away

A worker plans a call only inside the contact's hours, never on a holiday.

Switch it by hand

Change a worker's mode at any time. The calendar takes over at the next change.

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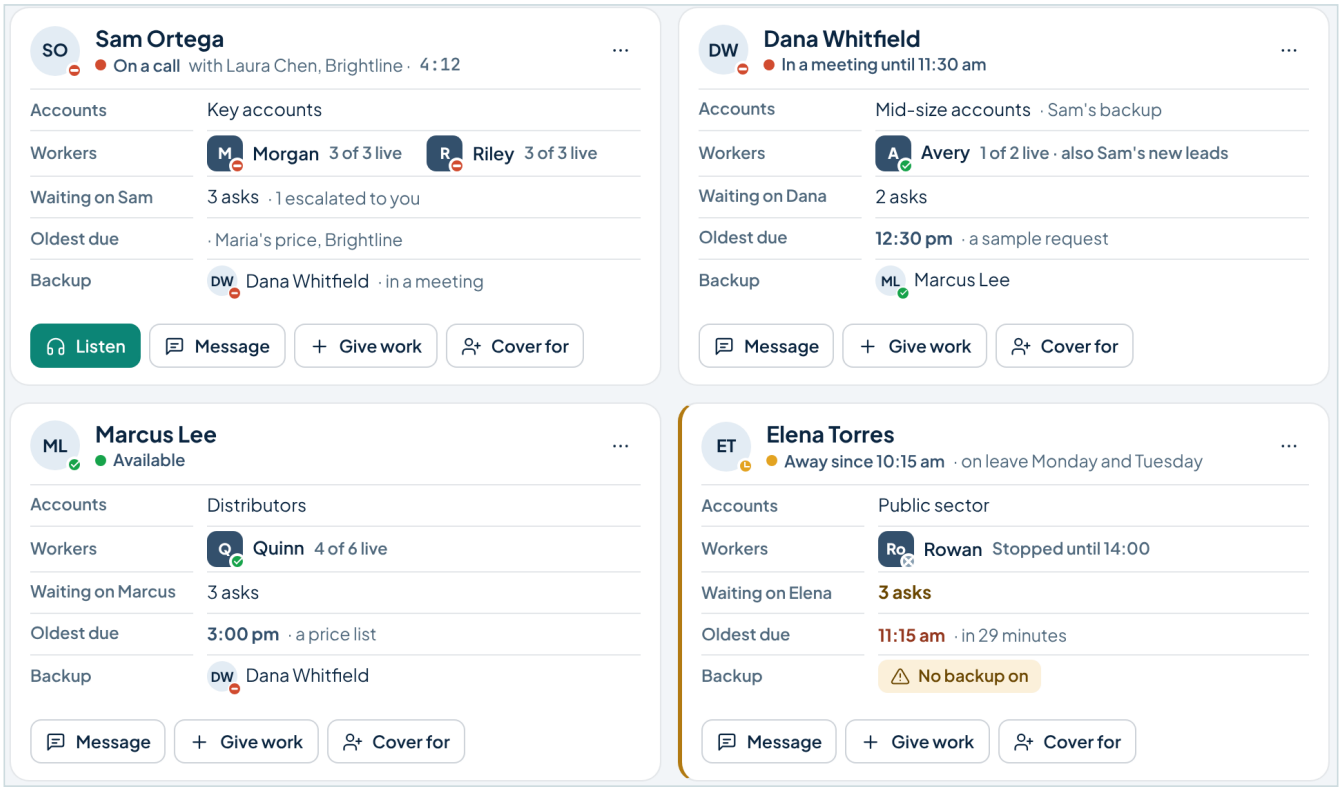
The Manager Desk. Run the team.

The Rep Desk's frame, with the team as its scope: the reps below the manager, their workers and their backups.



Team now for Priya Natarajan: a card for each rep, with what waits on them and their backup, shown with the made-up Northcott example. Product design with made-up data.

The team line

Asks waiting, asks above a rep's limit, flagged complaints, and clones live.

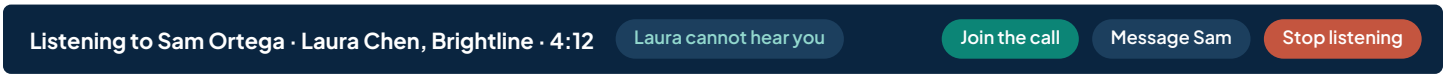
Gaps, today and tonight

A rep away with asks and no backup on, drafts waiting on someone busy, a line with no worker until the after-hours worker starts. Set a backup, Take it, Give to.

Cover for

Who covers a rep, and until when. Their open asks move to that person and keep their due times.

LISTEN TO ANY CALL ON THE TEAM, AND JOIN IT



Listen

Any call on the team, a worker's or a rep's on a CVW line, once the recording notice is given. Only the rep's managers may listen. The manager sees the rep's call screen read only.

The rep always knows

While she listens, the rep's call bar says "Priya Natarajan is listening". After she joins, it says so. Message Sam opens a chat the customer cannot see.

Join the call

The customer, the rep and the manager all hear each other, and her words are written as hers. Leave the call drops only her. There is no take over on a rep's call.

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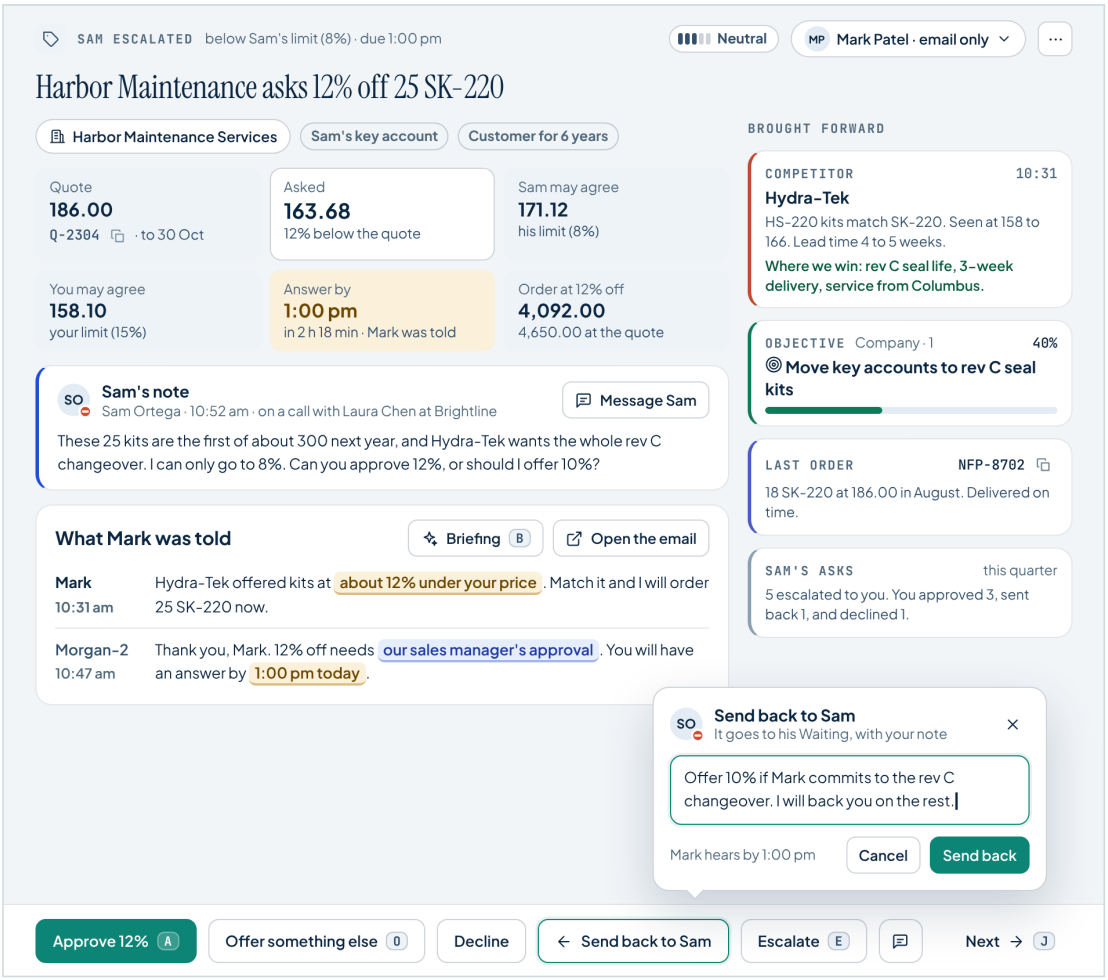
Limits, coverage, coaching and results.

Decide what is escalated, balance the work, see who covers whom, coach and measure the week.



An ask Sam escalated, with his limit and hers, and Send back to Sam, shown with the made-up Northcott example. Product design with made-up data.

THREE LIMITS

The worker
What it may agree alone.

The rep
Sam may agree 8%.

You
Priya may agree 15%.

SEND BACK

"Offer 10% if Mark commits to the changeover." It shows on Sam's Waiting as Sent back by Priya Natarajan.

Approval limits by person

Each person can have their own limit for a kind of commitment, set by an administrator in Who decides, never their own. Past it, deciding is refused: "Escalate it."

Capacity

Work: the team's work by holder, reps, workers and Sage, against their hours; drag rows onto a name, checked first. Coverage: the week, with hours, time away, on call and backups, and gaps in amber.

Coaching and results

Conversations that were nudged, joined, taken over or ended worse, with the score on each question, Management only. The week against the last, objectives with each rep's share, and workers compared. Reps are never scored.

Teams and who covers what

A company can organise sales by division, segment, product, country or named accounts. Each account has an owner, or goes to the next free rep, or an inside rep supports outside account executives. Who covers what decides who gets new accounts.

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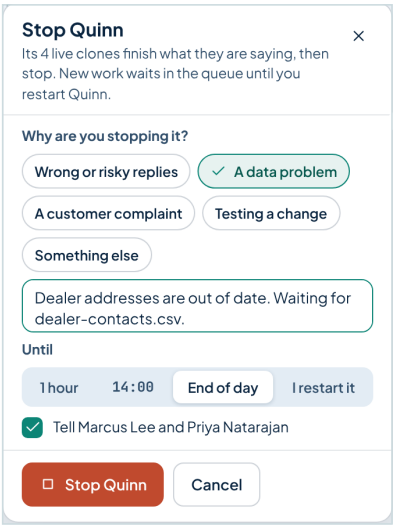
The Client operator Desk keeps CVW running.

The client operator fixes what a load refused, approves load rules, reviews what went badly, approves what the workers learn, and stops and restarts workers. This desk has no phone.

WORKER	STATE	MODE	CLONES BUSY	QUEUE	WAITING	ERRORS (1 H)	LAST ERROR
Team workers 6 · 19 clones, 11 live							
Morgan Sam Ortega	Full all clones busy	Automated	3 of 3 Live, live, drafting	3	2	3	Reply check held 10:39 · price below the limit
Rowan Elena Torres	Stopped until 14:00	Assisted	0 of 3 Stopped	4	3	0	None today
Avery Dana Whitfield	Free 1 clone free	Automated	1 of 2 Live, free	4	1	0	None today
Quinn Marcus Lee	Free 2 clones free	Automated	4 of 6 Calls, chat, email	9	0	1	Email bounced 10:22 · an old dealer address
Riley Sam Ortega	Full on the campaign	Automated	3 of 3 Campaign drafts	180	6	0	None today
Jordan After hours	Off until 5:00 pm	Automated	0 of 2 Off	0	0	0	None today
Assistants 2 · Sage and Tess							
Sage Plans the day	Free 1 clone free	Automated	1 of 2 Working, free	15	3	0	Could not be done 09:40 · Tri-State Bottling
Tess Loads files	Free watching folders	Automated	0 of 1 Watching	0	1	0	12 rows refused 09:12 · Price list October.csv

Workers now: each worker's state, mode, clones, queue, waiting items, errors in the last hour and its last error, shown with the made-up Northcott example. Product design with made-up data.



Stopping Quinn: why, and until when, shown with the made-up Northcott example. Product design with made-up data.

Needs you

Refused rows, rules and lessons to approve, conversations to review and stopped workers, each with its fix.

Stop with a reason and a time

Why, and until when. Live conversations finish, nothing new is sent, and the worker restarts itself at the time set.

Data and one load

Every file loaded, with rows read, changed and refused. Fix rows in place, put them through, or undo the load.

Review and Lessons, on this desk: **Quality and the learning loop**

THE CVW GUIDES

Product overview
What CVW is and is worth, the workers, Sage and Tess, the desks, trust, and how to start.

The desks
Working beside the workers: the Rep, Manager and Client operator desks and the phone.

Intelligence and prospecting
Sourced profiles, news, ideal customers, list building, competitors and supply chains.

Channels and compliance
Addresses, lines and company numbers, calls and texts, contact rules and countries.

Quality and the learning loop
Scores, debriefs, the coach, review, lessons, tests, the live watch and measured decisions.

Technical architecture
For IT, security and architecture teams: how CVW is built and run.

Industrial sales
The made-up Northcott Fluid Power example: a manufacturer and its distributors.

B2B inside sales
The made-up Veridane example: a software company selling to banks and insurers.

Every guide is at **corvair.ai/cvw**. Screens are product designs with made-up data.

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