Technical architecture.

The companion to the product overview and the topic guides, for your IT, security and architecture teams. A logical view of the layers, where data lives and how it is kept apart, how work runs, and how access is granted and stopped.

Who reaches it

- **Customers** — Web chat, email, voice in the browser and by phone, SMS and WhatsApp
- **Your people** — Three live desks and a site for each role; email and chat apps
- **AI assistants** — The MCP service: one sign-in, scoped to the person

Front door — Nothing reaches the engine without it

- **Edge protection** — Google Cloud Armor rules and rate limits
- **Sign-in and one access check** — Tenant, company and role, applied in one place
- **Channel adapters** — One conversation across channels; signed Telnyx webhooks
- **Contact gate** — Before every outbound message; a check that cannot run counts as no

Engine — Shared code. Nothing about any client, domain or industry

- **Conversation and task loop** — Chat and voice, one loop, in the customer's language
- **Prompt assembly** — On the server; stable parts first, so the cache is kept
- **Commitment checks** — Your formulas and rules decide
- **Sage, the coordinator** — Watches, balances, coaches, chases
- **Calendar and modes** — Assisted, automated, paused
- **Requests and notifications** — Due times, named backups; the bell, email and chat
- **Training and simulation** — On the live system; actions are held
- **Tess, the data steward** — Loads files, keeps the rules, returns exceptions
- **Standard tools** — One catalogue; one gate to outside systems
- **Briefings and debriefs** — Built ahead by Sage; a debrief after every contact
- **People in a live conversation** — Watch, listen, nudge, join, take over
- **Scoring and review** — Every side, with evidence

Work — The database holds the work; Pub/Sub moves it

- **Queues on Pub/Sub** — Individual, shared, urgent, scheduled, failed; storage notices
- **Named workers and clones** — One account to one worker; one clone works it at a time
- **Control and activity** — Stop and pause notices; every event, live

Access — Workers hold no secrets

- **Access broker** — A lease for one step, expiring in minutes
- **Secret Manager** — Every key and token, per tenant
- **Stop switch** — A worker, a deployment, a company group or the platform

Operations and connectors — One standard list; your systems answer it

- **Operations set** — Standard operations and events, each with a tool and a skill
- **Connectors** — Files, web call, events, MCP, or a named person
- **Local setup** — Your field mapping and your own extra operations

Services — Called with CVW's own keys

- **Models and voice** — Gemini, Gemini Live, ElevenLabs
- **Telnyx** — Email, calls, texts and WhatsApp
- **Search hub** — Exa and Google grounded search; every call recorded
- **Decision service** — Jev, with Gemini as backup; every answer kept
- **Memory (CKS)** — Turn by turn, and the library; one tenant each

Definition and client build — Files and rows, not code

- **Sealed core** — Corvair
- **Pack** — Corvair: the generic role
- **Customisation** — An engineer or partner
- **Settings and lessons** — Your team
- **Client build** — Your data, formulas and local setup

Data — Tenant and company on every record

- **Control database** — One PostgreSQL database, cvw, by tenant and company
- **Storage bucket per tenant** — Recordings, reports, files, drop folders
- **Telemetry and logs** — Cloud Storage, kept for the retention period
- **Your systems** — CRM, ordering, inventory, purchasing, quoting

Dashed boxes sit outside CVW. Across every layer: tenant isolation, an event for every action, health checks and the stop switch.

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Defined, not coded.

A generic pack defines the worker, and a standard operations set defines what your systems are asked. Each client's data, formulas and local setup are built for that client and kept out of both. The engine holds nothing about any client, domain or industry.

THE WORKER DEFINITION: LAYERS OF PLAIN FILES

Layer	Edited by	Holds
Sealed core	Corvair	The core loop and guardrails, the tool and outcome contract, the assembly template. Never shown to client users; Corvair and partner engineers read it in the Workbench.
Pack	Corvair	The generic role: situations and their goal steps, contact types, playbooks, outcome fields, a profile for each kind of rep, and the scoring, coaching, simulation and research prompts. Sage and Tess come with every deployment, named once for each tenant.
Customisation	Engineer or partner, with the client	Situations, objectives and playbooks for this client, company objectives, tone, always and never rules, authority limits, channels, languages and whether the worker follows the customer's language.
Virtual worker	The client's manager	Its share of the work, channels, schedule, supervisor and clone limit.
Account	The account team	Account objectives with an owner and a time frame, the customer's objectives, open items, relationship notes.

THE OPERATIONS SET, AND THE CLIENT BUILD MADE FOR EACH CLIENT

Part	Holds	How the worker uses it
Operations set	From Corvair. The standard operations and events for one kind of business (next page)	Installed like a pack. The same tools at every client
Data	Products, prices, terms, team, customers and contacts, kept in step with your systems and loaded through Tess	Rows the worker quotes from, never documents
Formulas	Pricing, discounts, lead times and configurators, as tested code with versions. Each declares the operations it reads	Called by name, for example price.check or lead_time.check; the answer is allowed, needs approval or refused
Local setup	Which connector answers each standard operation, the mapping of your fields, addresses and secret names, and operations only you have	An operation such as stock.check is answered through the access broker by the first path that can

HOW THE PROMPT IS PUT TOGETHER

- Assembled on the server from sections, each a file with one owner.
- Stable parts come first and changes are appended, so the model's prompt cache is kept from call to call.
- Never sent to a client user's browser. For voice, the server locks the assembled prompt into the voice session token.
- Every file is versioned, and each conversation records the versions it ran on.
- Setup pages edit the same files, so clients never write prompt text. Each save is a new version with its author, can be undone, and can be tried in training first.

Which section wins

1. Core guardrails, always
2. The customer's never rules
3. Company facts and authority, from the rows
4. Active lessons and the worker's notes
5. Then the narrower layer: account over worker over deployment over pack

A lesson or setting that conflicts with the core is refused with the reason.

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One set of tools. One list of operations.

Every worker has the same tools at every client. Your systems answer a standard list of operations through connectors, so the worker never sees a system directly. Only what answers an operation changes from one client to the next.

FROM THE WORKER TO YOUR SYSTEMS

The worker calls a tool
One catalogue: look up, check, ask, do, record.

The tool runs a check
Your rule on what may be said or agreed.

The check reads an operation
A standard question, such as stock.check.

A connector answers
By the first path that can.

The answer is data
With its source and the time it was true.

THREE LAYERS

Layer	Owned by	What it is
Operations set	Corvair	The standard operations and events for one kind of business. Each has a contract, the tool the worker calls, a skill that says when to use it and what to say, and sample answers.
Connector	Corvair or a partner	Code that answers operations from one kind of system: files, a web API, events, an MCP server, or a named system.
Local setup	An engineer, with you	Your field mapping, addresses and secret names, the order of paths for each operation, and operations only you have.

FIVE WAYS TO ANSWER AN OPERATION

Path	How it answers	Fits
Live call	A call to your system at the moment the worker asks	Stock, order status, lead times
Loaded file	Rows loaded by Tess from a file, a drop folder or a sheet, answered from CVW's own tables and said with their time	Price lists, products, a system with no API
Event	Your system tells CVW when something changes; CVW keeps the rows current	Orders, shipments, price changes
MCP server	The connector calls a named tool on your or a vendor's MCP server and maps the answer	A system that already offers one
A person	The operation becomes a request to a named team member, with an answer-by time	A small team where stock is "ask the warehouse"

An engineer sets the order of paths for each operation, usually live, then loaded, then a person. The engine tries them in order, passes over one that is not available, and labels the answer with its source, such as the system's name or the load and its time. A formula gets each operation it declares, or "not available", so it can fall back.

EVENTS

- **In:** a signed address per connection. An event updates its rows, appears on the account's timeline, can start work by a rule, and marks the briefing out of date.
- **No push:** a file drop or a scheduled pull is compared with the last one, and the differences become the same events.
- **Out:** a signed webhook, a file written on a schedule, or a write through a connector.

RULES FOR EVERY CONNECTOR

- Secrets stay in the access broker, which grants a lease for one system and one action.
- What comes back is data. It cannot instruct the worker.
- A change carries a reference, so a retry cannot repeat it. It is not called accepted until your system says so.
- An extension adds fields, skill words or your own operations. It never changes a standard contract.

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Prices, quotes and contracts.

The worker quotes the way your company prices. The price and quote operations (price.get and quote.request) return the answer, the commitment check decides what may be offered, and nothing in the engine assumes a price is one fixed number.

THE QUOTING MODEL, SET IN EACH DEPLOYMENT

Part	The range it covers
Where the price comes from	A static list. A list by customer class, such as wholesale, distributor and end customer. Volume breaks. A live price from your system that depends on place and time. A formula. A person.
What is priced	The Catalogue's three kinds of item: products, sold each, with a usual lead time; services, per hour, day or project, with when they can start; subscriptions or licences, per seat or plan, per month or year. The Price book prices each in its own unit.
Promotions, rebates and bundles	Each is a dated rule.
What the worker may give	Nothing, an indication, a range, a firm price or a formal quote document.
Steps before a price	Qualifying questions, an assessment, a site visit, a pilot, a credit check or an approval.
Validity, terms and caveats	How long a price is valid, and the terms and caveats that go with it.

THE PRICE CHECK, WITH A CONTRACT

A price is asked for
The worker calls a tool. The check reads the price or quote operation.

→

Is a contract in force?
The check asks first, for this account. With none, the standard logic runs.

→

A contract applies
Its terms are used wherever they cover the item or the term.

→

What it does not cover
Follows the standard logic.

→

The answer comes back
Allowed, needs approval or refused, with the reason and the fields below.

A CONTRACT IS DATA

- The terms are rows: the items and prices it covers, discounts, payment and delivery terms, limits, the clauses that must go on a quote, and its start and end dates.
- The document itself is in the account's library collection.
- A quote made under a contract carries its reference and its required wording, and the worker can say "under your contract".
- A contract near its end date becomes work for the account owner.

WHAT A PRICE OR QUOTE ANSWER CARRIES

Field	What it says
Price or range	The figure, or the range
Unit and currency	What the figure is for, and in what currency
Conditions	What it holds under
Valid until	When it lapses
Firm or indication	Whether it can be agreed or only indicated
Source	Where it comes from, such as a contract or a list
Caveats	What must be said or sent with it

The lead time check
lead_time.check reads plant lead times, else the usual lead time, in business days with your closures and holidays, and names its source. An earlier date needs approval.

Offers are dated rules
A promotion or campaign offer is a dated rule the price check reads. A live price is fetched again at the point of agreement.

The simplest case needs no engineer
A price list loaded from a file, with one standard check. The worker still offers only what a check returned.

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What the worker knows.

Sage builds a profile of your company and of each account ahead of time and keeps it current. A worker goes into every contact with a briefing and comes out with a debrief. Every fact shows its source and how far to trust it.

Thing	What it is	Built by	When
Company profile	Your company: what it sells, to whom, how it sells, who is who, its terms, and what each product does, replaces, goes with and who buys it	Sage, from your records, Library and websites. In use at once; a person approves only what could be wrong (next page)	At setup, then when a source changes
Account profile	One customer: who they are, the people and their roles, what they buy, how they decide, which ideal customer segment it fits, what is happening to them	Sage, from your records, past conversations, its website and annual report	When the account is added, then kept current
Briefing	The page a worker gets before or during a contact	Sage	Ahead of time. Rebuilt when anything in it changes
Debrief	What one contact taught us and what it puts in doubt	A separate pass, not the worker	After every contact

A FACT, AND HOW FAR TO TRUST IT

Attached to every fact	Values
Source	A document and page, a web address, a conversation and who said it, a person on your team, or your own records
Standing	**Confirmed:** the customer said it, or it is in your records. **Reported:** a document or the web says it. **Assumed:** worked out from other facts
Dates	When the source is from, when it was learned, and a check-by date after which the fact is treated as old
Who may see it	Everyone with access to the account, or named people only

THE BRIEFING: ONE FIXED LAYOUT

1. Internal. Built by Sage on this date. May be wrong or out of date
2. Who they are, and the person: role, what they may approve
3. Where things stand: open quotes, orders, requests, promises
4. What we want: your objectives, the account team's, the customer's
5. What we do not know and want to learn, from the objectives
6. To check: facts that are old, only reported, or in conflict
7. Not to be mentioned

HOW IT REACHES THE WORKER

- **Outbound:** added to the prompt before the first word. Sage rebuilds it first if it is past its check-by dates.
- **Inbound, known by the channel** (an email address, a signed-in chat, a phone number): loaded before the first reply.
- **Inbound, known by what they say:** the worker looks the account up, and the briefing joins the next reply.
- **Not known to you:** the worker carries on with the company profile while Sage builds a first profile from the web, every line marked Reported.
- Loading a briefing is reading stored text, so it does not slow a reply.

Internal and fallible

A briefing is never read out. Only a Confirmed line from your records is said as fact. Any other line is raised so the customer can correct it, and the customer's version is used from that moment.

What Sage decides

She adds what a customer says about themselves and what the web reports. A fact that conflicts with your records, or would change an objective, goes to a person. Each change can be undone.

The debrief

Learned, corrected, to question, gaps closed and still open, and proposed changes. Each item is applied, waiting for a person, or dismissed, and is kept with the conversation for review.

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Sourced facts, kept current.

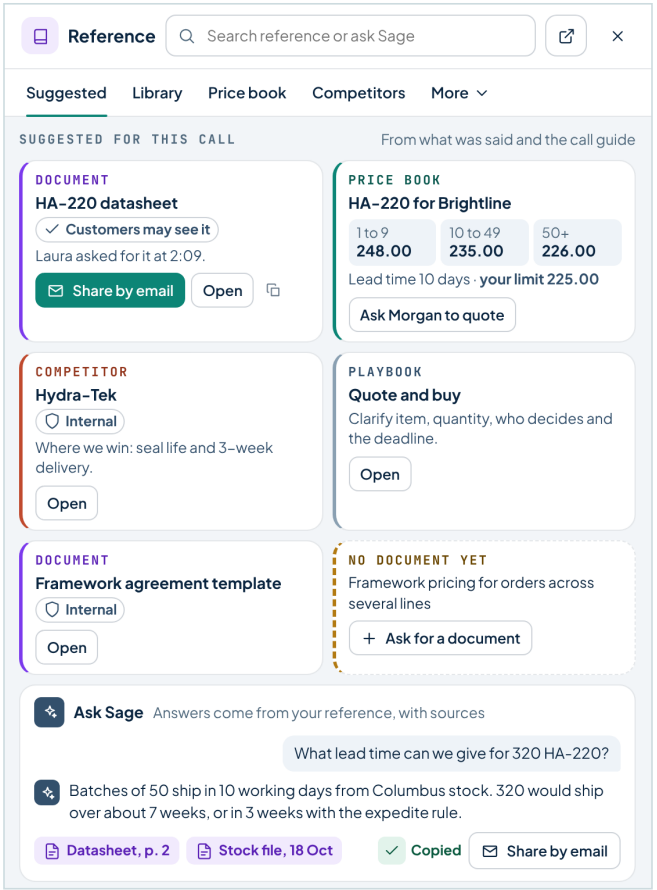
Every profile is a view over one store of sourced facts: company context, each product, each account, each contact and each competitor. Sources come in by themselves, every line names its source, and approval is kept for what could be wrong.

FROM A SOURCE TO A LINE IN USE

1. **A source arrives by itself.** A Library document version with extracted text, a page on your own websites, the maker's site for a product you resell, or your loaded records. "Do not read" turns one off.
2. **The text is read from storage**, without waiting for the search index: the whole document, up to 400 pages, in batches of 40.
3. **Products named in it are linked**, by source key, name or other name, matched as whole words, with the page they were found on. A person's link is never removed by Sage.
4. **Lines are written by part**: what it does, what it replaces, what goes with it, who buys it. At most three a part from one source, each with its page. A product named in a line is linked.
5. **Trust by source decides** whether the line is in use at once or waits for a person.
6. **A conflict changes neither line.** One question goes to the administrators. A wrong line is marked wrong and kept, so the history reads.

TRUST BY SOURCE

Source	In use	Standing
Your own records and loaded files	At once	Confirmed
A document in your company's Library	At once	Reported
A page on your own websites, or the maker's site for a product you resell	At once	Reported
An account's own website and annual report, for that account	At once	Reported
Any other page, news, or a research finding	Waits	Reported
Something Sage worked out and did not read	Waits	Assumed



Reference beside a call: documents a customer may see, a document still missing, and an answer with its sources, shown with the made-up Northcott example. Product design with made-up data.

Sites, read politely

A site reader takes the sitemap, or same-host links from the home page: up to 200 pages, one a second, honouring robots.txt, read again monthly. Up to five pages from a maker's site name the product.

Research fills the gaps

A part still empty starts a search limited to your and the maker's sites. Only if they find nothing, one open search runs, and its lines wait. At most once a product a month and 200 searches a company a day.

Workers cite their sources

A look-up returns each line with its part and source, at most five a part, so a worker can say "the data sheet says". A product read adds its linked documents.

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Research, news and memory.

Sage reads public business sources into each profile, and every line keeps its source. Search runs through the search hub: Exa for companies, people, news and job postings, and Google grounded search. Social sites are never fetched, nothing made up is ever searched, and the forget list is checked before any research on a person.

WHAT IS READ, AND FROM WHERE

Source	What is read	Where it goes
Account website	The home page and its About, Company, News, Press, Careers and Investors pages. With no website on record, Sage proposes one for a person to confirm	The account profile, each line with its page as the source
Annual report	The latest one, for each key account	Kept in the account's library and read into the profile
Documents	Any document a person adds to an account	Read into the profile
Summary	What the company does, in one line	On the account
Public business profiles	Addresses on LinkedIn, X, YouTube and others. Never fetched	Kept as links on the account or person
News	Exa from a start date, with highlights, for every account and your own products: daily for key accounts, weekly for others	The account owner is told once, with a count. Along supply chain links, an end customer's news reaches the accounts that sell to it
Competitors	Their website, documents you upload and their news	A competitor profile. Each offering is matched to your products feature by feature by the decision service; prices seen online are looked up for one product on demand, and stay internal
Job postings	A competitor's or a fitting account's own careers pages and the main job boards, weekly or monthly, or on demand	A dated fact with its link, when the posting is the company's own and shows a new product, market, technology or site

RESEARCH THIS PERSON

- Only on request, and only after the forget list is checked. A person who asked to be forgotten is never researched.
- Their business role, employer and public business statements. Never their home, family, health, beliefs, photos or private accounts.
- Each finding shows its source, and a person confirms it before it is saved.
- A finding that a contact has moved employer becomes a question, such as "Has Greg moved to <company>?", never a change on its own.

MEMORY

- Conversation memory is kept turn by turn in CKS memory, the Corvair Knowledge Substrate, in one knowledge tenant for each CVW tenant.
- CVW keeps the summary, the facts, the briefings and the debriefs, with pointers to the detail.
- A briefing is read from stored text, so loading one does not slow a reply.

Made up is never searched

In a demo tenant every organisation, product and family is made up. No web search, page read or fetch runs for one; the samples keep their written lines.

Sage's daily brief

Each morning: what needs you and by when, what is slipping, news on your accounts, what she changed in profiles and Tess's data summary, each with an action.

Sources stay attached

Every line Sage reads into a profile keeps its source and date, and is marked Reported until a customer or your records confirm it.

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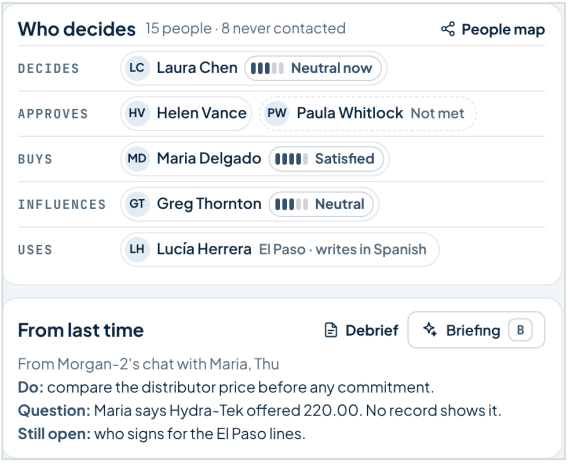
Ideal customers, lists and supply chains.

Profiles, segments and roles are rows. Fits are decided question by question and combined in code. List candidates become accounts through the same path as any account. A supply chain is links read across, two deep at most.

Record	What it holds
Ideal customer profile	One for each industry or market a company targets, as many as it needs: a name, a description, and a state (draft, in use, retired). A Sage draft is used for nothing until a person keeps it.
Segment	Countries and places, industries, employees from and to, signs of fit, what rules a company out, and example accounts.
Prospect role	Usual job titles in any language, seniority, department, part in buying (decides, approves spend, specifies, uses, influences, opens the door), what they care about, and the role pack's contact type the worker uses.
Account fit, contact role	Fits, may fit or does not fit, with a score; matched or maybe. Each set by a decision, a person or the sample, with the decision record behind it.

HOW A FIT IS DECIDED

- One decision call for each account and segment. The state: name, website, country, summary line, up to 40 profile lines, customer class, and industry and employees when a file or CRM gave them.
- Questions: industry on three levels, a yes or no for each sign and each rule-out, and size only when no employee number is known. Place is code.
- Code combines the answers, and every answer is kept, so the rule can change without asking again. It runs when a segment is kept or changed, and when an account's lines change, at most daily.



Who decides on an account, by part in buying, shown with the made-up Northcott example. Product design with made-up data.

A LIST SEARCH, FROM A SEGMENT TO REAL ACCOUNTS

From a segment
Its words and criteria fill the search. Up to 500 candidates.

Company search
Up to 8 queries, 25 results each; local business data where it names places.

Fit checked
The segment's questions. A sure no is left out, with its reason.

Already held?
Domain and name in the same country: the same, part of, or may be.

Accepted
Through account creation: owner, team, worker, watchers, profile and fit checks.

PEOPLE AND CONTACT DETAILS

- People are found by the segment's role titles at up to 100 accounts. Each is checked: do they work there now, and which role. Sure fits are added at once, with Undo, as the verdict.
- A work email or phone is found for one contact on demand, with its source, unverified. Never for a whole list. Social sites keep only a title line and an address.

SUPPLY CHAINS

- Links between accounts and organisations (sells to, buys from, with what flows) are read two deep, within the reader's reach, for an end customer's supply chain panel.
- Direct work on an end customer raises one notice to the owners of the accounts that sell to it. A worker there reads the suppliers by name only.
- News fans out along the links. A move writes change events on both accounts and tells both owners.

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Decisions and search.

Many small judgements are made by a decision model and act at once when it is sure. Every answer is kept and measured against what people later decide. Search runs through one hub that records the cost of every call.

THE DECISION SERVICE

Asked
A surface, a subject, a state and typed questions: a choice, a yes or no, or a score.

Answered
Jev, from TypeSafe, gives every option's probability. Gemini is the backup.

Banded
Sure acts (0.8 by default). Unsure asks a person. A clear no drops.

Recorded
Questions, every probability, the band, the action, tokens and time.

Measured
What a person later did: kept, changed, undone, or checked right or wrong.

SURFACES, EACH WITH ITS OWN SETTINGS

Surface	Decides
Country rules	Whether official words support a rule's value
Search passages	Which sources answer a worker's question
Account fit, contact role	Fit to a segment; a contact's role
List fit, same company	A candidate's fit; whether two companies are one
Person at company	Whether a person works there now, and which role
Offering match	Whether their product is ours, feature by feature
Listing match, job posting	A comparable listing and its unit price; a posting that matters

MEASURED, NOT ASSUMED WRONG

- Every surface starts acting. Decisions are taken as correct until measured otherwise.
- Every 20th acting decision on a surface is shown to a person with Right and Wrong.
- When the last 50 verdicts agree less than 95% of the time, the surface asks a person every time, operators are told, and only an operator switches it back.
- The backup returns the same probabilities, and confidence is worked out the same way, so both give the same fields. Each record says which answered.
- The state itself is not kept, only its fingerprint, because it can hold people's names.

THE SEARCH HUB

Caller	Search type
A worker's web search, team chat, people research, profiles, annual reports, list searches	Exa lite: fast and cheap for volume
News and filing watchers, competitor news, country research	Exa auto
A country topic with no official page yet	One deeper search, on official domains only
An official page CVW's own reader cannot open	Exa contents, fetched fresh from that address
Quick answers with sources, and when Exa does not answer	Google grounded search

Highlights, not pages

Results bring the passages that match, spread across the results, in place of whole page text. A worker's sources are filtered first, and on any failure all go through.

Every call recorded

Purpose, tenant, company, type, results, cost, warnings and notices, with no query text, because queries hold names. Kept 180 days, shown as search spend.

Never searched

Social sites are never fetched, and nothing made up is ever searched. A page read through Exa keeps its official address and says so.

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How work runs.

A manager creates named workers under a deployment. Each runs one or more clones. The database holds every work item and its history, and Pub/Sub carries the notices that move work, so nothing polls.

FROM THE PLATFORM TO ONE CLONE

Platform Corvair → **Tenant** One customer organisation → **Company** Its own customers, prices and team → **Deployment** One company's customised pack → **Virtual worker** A named worker, such as Morgan → **Clone** One running copy, such as Morgan-1

A clone is an instance in the code. Customers never see clones, only the worker's name. A worker may run 0 clones (defined, not deployable), 1 (the default) or more, up to its limit. An agency is one tenant, and each of its clients is a company inside it, so one client never sees another's records.

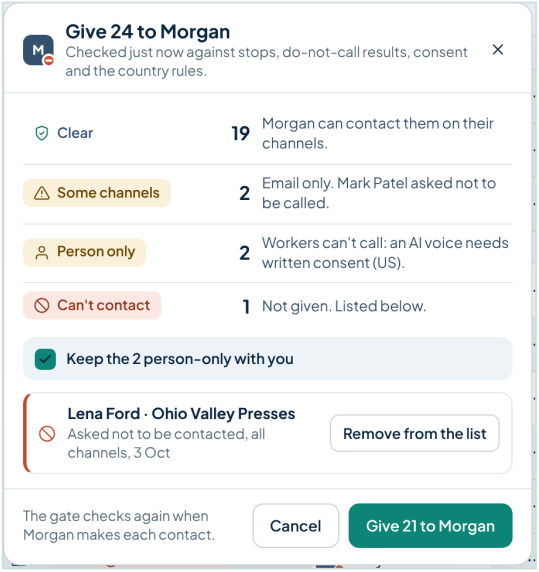
HOW A CLONE DOES ONE ITEM

1. **Claim.** The next item arrives by notice, not polling.
2. **Read the briefing.** The profile, objectives and open items Sage prepared.
3. **Act within limits.** Follows the playbook. Every price, discount or date is checked first.
4. **Ask a person** when a decision is not its to make. The item waits.
5. **Record and report.** The outcome and a debrief. It creates its own next items.

CHECKED WHEN WORK IS GIVEN

- Before an item reaches a worker, every person on it is run through the contact gate for that worker: stops, do-not-call results, consent by channel and the country's rules.
- Each gets one stored result: Clear, Some channels, Person only, Can't contact, or Waiting for a check. The work table filters by it, and a move to another holder checks again.
- Nothing can't-contact is given or dropped silently. The gate runs again at each contact.

Work that starts itself. Rules turn signals into work: an intent signal, a renewal date, a trial ending, usage near a limit, an incident (which holds outreach), a champion who moves, a hiring sign, or an account going quiet. A promise always outranks the weekly contact limit.



Giving 24 items to a worker, each person checked first, shown with the made-up Northcott example. Product design with made-up data.

QUEUES ON GOOGLE PUB/SUB

Queue	How it is built
Individual	A subscription that only one worker's clones pull from
Shared	Pulled by the clones of several workers; each item goes to one
Urgent	A separate subscription per queue, emptied first
Scheduled	Published by the calendar service when its window opens
Failed	Repeated failures go to a dead-letter topic
Control	Stop, pause and stop-switch notices, checked before each step
Activity	Every event a clone emits, for the live view and health

One account, one clone at a time

The account is the ordering key, and a claim in the database lets one clone work it. Parallel across accounts, in order within each.

Modes, from the calendar

Assisted: people first. Automated: alone, under tighter limits, hand-offs wait for the morning. Paused: no new work. One after-hours worker can answer every rep's line.

Control and scaling

A supervisor can pause or stop a worker, a clone or an item. Sage starts and stops clones within each worker's limit; Cloud Run adds capacity.

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Campaigns, pools of people and cadence.

A campaign groups work under one purpose. Each work item records its campaign, so usage and results are counted for each campaign. A campaign runs in CVW, or outside it by marketing.

THE CAMPAIGN RECORD

Field	What it holds
Name, owner, dates	Who runs it, when it starts and when it ends.
Where it runs	In CVW, or outside CVW by marketing.
Audience	A list of accounts, or a pool of people who may have no account yet, with where the list came from and its basis for contact.
Situation	The situation from the pack that the worker follows: Prospect, Reactivate, Follow up, Invite, Notify or Remind, each with its own goal steps.
Message	The points to make. The worker writes each message from them and from the person's record.
Offer	What is offered, its terms and its dates, held as a dated rule that the price check reads.
Cadence	The plan of attempts: the channels in order, the gap between them in working days, the most attempts, and what ends it. One message a week to one person, across all campaigns.
Materials	Documents from the library.
Objective and priority	What it is for, and where it ranks on an account.
Outcomes that count	The key events it is meant to produce.
Profile depth	A light record, or a full profile, for the people in it.
Greeting	Who the worker says it is an assistant for.

POOLS OF PEOPLE: PEOPLE BEFORE ACCOUNTS

- A pool of people is an audience who may have no account yet. A person gets a record from the list row, and becomes an account when they respond.
- A person on two lists is contacted once.
- When a person belongs to an account with its own worker, the account owner decides who makes the contact, and a recorded preference of the customer overrides that. By default the account's own worker makes it.
- A person the worker is referred to in a conversation is tracked from that point, with who referred them.

WHERE A CAMPAIGN MEETS THE ENGINE

- **Run outside CVW:** the worker is told what was sent, to whom and the offer. It handles the replies and follows up the leads.
- **Work:** each work item records its campaign.
- **Offer:** a dated rule, so the worker cannot offer it outside its terms.
- **Contact gate:** the check runs again before every attempt in the cadence, and the frequency limit counts across campaigns.
- **Results:** people reached, replies, outcomes, key events and value, for each campaign.

THE CAMPAIGN STUDIO: THE AUDIENCE, COUNTED AT EACH STEP

A campaign is planned in four steps: Audience, Message and offer, Who and when, and Review and start. Lists combine with Add, Only if also in, and Leave out, and Sage can build a list from a description. The studio shows the count after each step.

In the lists
Added, kept only if also in another list, or left out.

→

Kept once
The same address appears once.

→

Left out
People on a list marked Leave out are removed.

→

One per company
Optional: one person for each company.

→

After the contact rules
The people ready to contact.

The contact rules leave out people who asked not to be contacted, have no basis for contact, are in a country with no approved profile, were contacted by anyone in the last 14 days, are in another running campaign, or prefer a person.

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People in the loop.

A worker asks a person when a decision is not its to make, and a person can step into any live conversation. Every ask has a time, a backup and the limits of each person who may decide it.

A REQUEST CANNOT STALL

The worker asks
A decision, a contact, a take-over, or to join. One named person.

A time it can keep
Checked against that person's calendar. The customer is told.

Reminded
Sage reminds the person, then the backup. Silence is never a yes.

To the backup
At once if the person is Away or Off, with the same facts.

Answered anywhere
On the live desk, by email, in chat, or through an AI assistant.

IN A LIVE CONVERSATION

A person can	How it works
Watch	The transcript line by line, each reply with where it came from, and what is waiting on a person.
Listen	Listen only, with the microphone closed, through the participant socket on the call's sound. On a rep's call on a CVW line only the rep's managers may listen, and only after the recording notice. Listen events are written to the conversation, so the rep's desk shows who is listening from any server.
Nudge	A private line that guides the worker's next reply. Only the worker sees it, and the reply that used it is marked. A nudge cannot take the worker past what it may agree.
Join	On a worker's conversation the worker introduces the person by name and role and keeps the record. On a rep's call, Join moves the call into a conference, so the customer, the rep and the manager hear each other; leaving drops only the manager's leg.
Take over, and hand back	On a worker's conversation only. The person is the only one answering until they hand it back, with an instruction if they wish.

LIMITS ON AN ASK

- The rule's limits are rows: what the worker may agree alone, what its approver may approve, and what is never allowed. A person may also have their own limit for a kind of commitment, set by an administrator, never their own.
- An ask with a figure carries the asked figure, the holder's limit and the reader's limit, read from the check call that raised it.
- Approving past your own limit is refused, and Escalate becomes the main action. Escalate goes to the person you report to and keeps the due time. Send back returns it to the rep with a note.

NOTIFICATIONS

- A bell on every screen. Each notice says what it is about, what to do, and opens the exact place.
- For failures, things that cannot wait, and completions a person asked for. Work that waits is on the person's live desk.
- Pushed over a live connection. The same notice reaches email and chat, and is read once.
- Failure text is cleaned of secrets before it is shown.

Acting and asking
Clear and ordinary: done, with one line and Undo. Could mean two things: one short question. Hard to undo or wide in effect: one question, naming what changes. The same rule holds for a worker, for Sage and for the screens.

Real unless declared
Everything is real unless a person declares it as training or simulation. What such a conversation would have done is held until it is saved to the account or discarded.

Sage's view
Load and capacity, who has what work, what is due, what is known and what she suggests, scoped to the person's role. She acts on a clear instruction and reports it with Undo.

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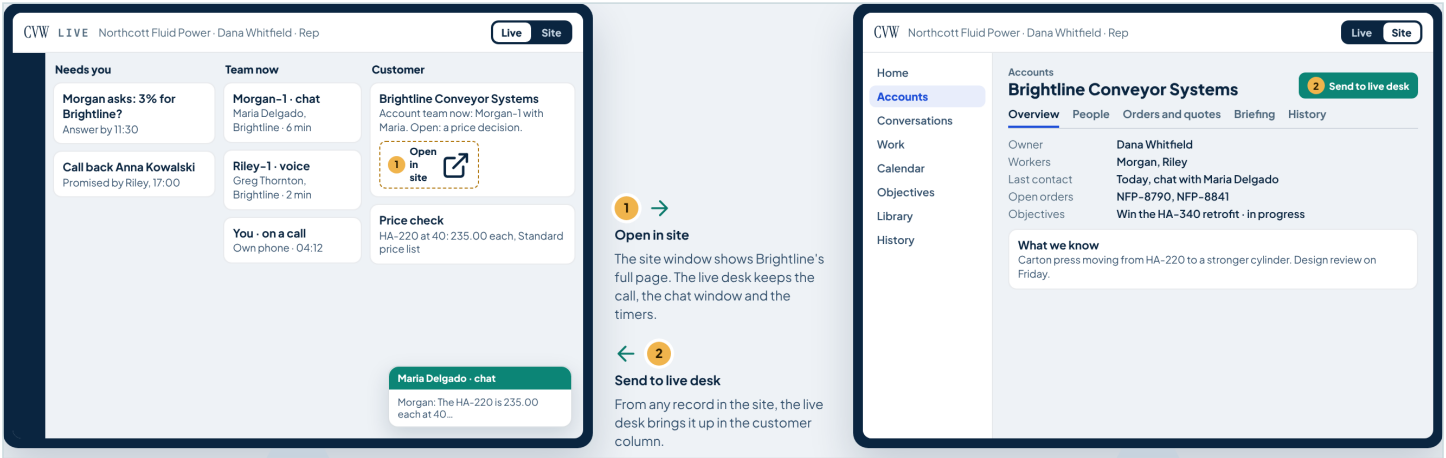
Three live desks on one frame.

Each role works from a live desk for the work happening now and a site for everything else. The Rep, Manager and Client operator desks share one frame and one set of parts. The two windows talk to each other in the browser, so showing a record never reloads the desk or drops a call.



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 SEATS, AND THE LIVE DESK EACH ONE OPENS

Seat	Live desk
Rep	The Rep Desk: Today, Waiting, Workers, Plan, Outreach, Messages, Contacts; the phone in the header
Manager	The Manager Desk: Team now, Waiting, Capacity, Coaching, Results, for the manager's team; Listen and Join on any team call
Client operator	The Client operator Desk: Needs you, Workers now, Data, Review, Lessons. No phone; the header shows the live count
Client admin	Setup live: requests, who decides, how ready the company is to sell, today's changes with Undo, and the stop switch
Engineer, Platform operator	Workbench live for the Corvair engineer or partner (forward deployed engineer, FDE); Platform live for Corvair
Agency seats	An agency rep works several clients from one desk; replies go out under each client's name

ONE FRAME, THREE DESKS

- Each seat has its own screen keys, screen map and rail; the header, Me, the find palette and the parts are shared.
- Records slide in from the right in one stack, up to eight deep, with Back. Each has Open on the Site. Calls, chat windows and timers live only in the live desk.
- The team status read follows the reporting lines down the chain, so a manager sees her team, its workers and their backups.
- A person with several roles picks the seat once, and both windows follow. A seat changes the desk and the menus, never what a person may do.

SHARED PAGES, AND WHO MANAGES EACH

Page	Managed by
Accounts, Contacts	Reps correct their own. Managers change owners and merge
Catalogue, Price book	The client admin. The client operator loads price files through Tess
Library	The client operator adds and retires documents. The client admin decides who may see each
Competitors, Glossary	The client operator, with notes from reps
Calendar	Each person their own

The same page in every site and a slide-in in every live desk. Only the managing role sees edit controls.

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Data, services and telemetry.

One control database. Every record carries its tenant and company, and is read as needed, never whole tables into memory. Many workers and people work on the same records without locking each other out.

WHERE DATA LIVES

Store	Holds	Kept apart by
Control database	Tenants, companies, workers, accounts, work, requests, key events, sourced facts, decision records, search attempts, settings and loads. One PostgreSQL database, cvw, partitioned by tenant and company; schema changes in one numbered sequence.	Tenant and company columns on every row, with one access rule per table
Storage bucket	Recordings, reports, library files, drop folders, exceptions files, exports	One bucket per tenant
Memory and library	Conversation memory, turn by turn, and library search with citations, in the Corvair Knowledge Substrate (CKS)	One knowledge tenant per CVW tenant
Telemetry and logs	Step and model records and service logs in Cloud Storage for the retention period, then deleted; counts and key events in the database	Tenant on every record; debug records visible to engineers only

Residency. A deployment's servers run in the country it serves, such as the USA, or in the nearest region where the cloud has none. Its database, storage, telemetry and memory stay in that region. Some model APIs do not say where they process data, so each deployment lists its models and where they run, and a tenant that needs sovereignty uses models with regional processing. Many tenants can share one system in a region, or one tenant can run in its own cloud project and database.

Limits are settings. Reader times, model call times, prompt sizes, turn budgets and the decision service's model and time are settings an operator changes.

SERVICES, CALLED WITH CVW'S OWN KEYS, AND WHAT HAPPENS WHEN ONE IS DOWN

Service	Used for	If it is down
Gemini	Text conversation, writing, summaries, reasons behind scores, translation of each turn for your team	Shown as down on the status page; supervisors are alerted
Gemini Live, ElevenLabs	Voice in the browser; ElevenLabs as the alternate voice	Shown on the status page; ElevenLabs is the alternate
Exa, Google grounded search	Companies, people, news, job postings, research, lists	The hub tries the next provider and records both
Jev, from TypeSafe	Decisions, with every probability kept	Gemini answers the same questions as backup
Memory and library	Account memory; document search with the file and page	Shown as degraded or down on the status page; supervisors are alerted

TELEMETRY AT A LEVEL YOU SET

Level	Records	Typical use
Debug	Every model call with its full prompt and response, every tool call, timings. Expires back to a lower level.	Diagnosing a problem; engineers only
Detailed	Every step and tool call, without full prompts	Tuning a new deployment
Standard	Every work item, conversation and state change	Normal running
Operational	Health, counts and key events only	Quiet, long-running deployments

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Tess and data loading.

Tess, the data steward, works beside Sage in every deployment. She is always on, loads your files, keeps the rules for each kind of file and returns what she cannot load. She reports to the manager your company names, Sage can direct her, and she never talks to customers.

ONE POPUP FOR EACH FILE

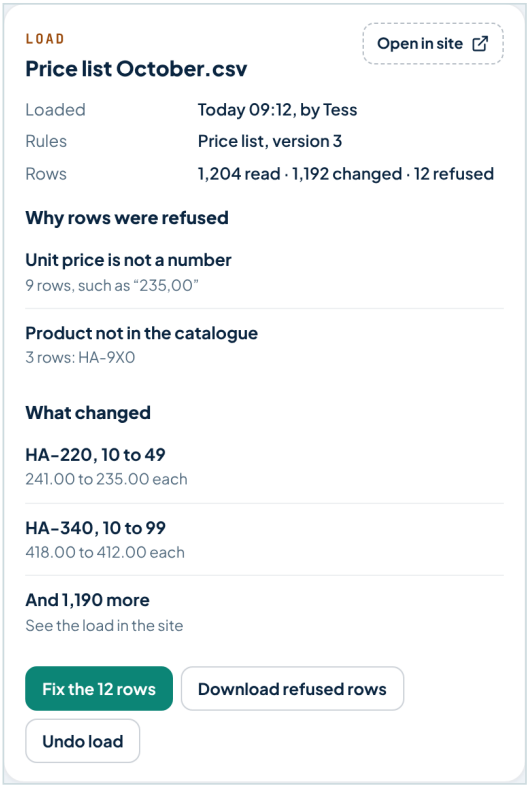
1. Reads the character set, the separator and the header.
2. Finds rows to skip, and totals at the end.
3. Profiles each column: how full it is, its formats and its problems.
4. Matches the columns to the fields of the file type.
5. Offers clean-up: capitals, spaces, emails, phone numbers in international form, dates and countries.
6. Checks every row before anything is written.

RULES, LOADS AND EXCEPTIONS

- Rules are saved with the column matching, and versioned. One can be the standard for a kind of file, so the next file of that kind loads the same way.
- Load rules, data files and loads are versioned records in the control database.
- Refused rows are kept, and written to an exceptions file in the same format and header as the original, with a column saying why.
- A company in a contacts file that is not an account yet is added as a prospect.
- On the Client operator Desk, refused rows are fixed in place and put through, and loads are undone or run again, one at a time or in bulk.

EVERY KIND OF RECORD

- Every kind of record CVW holds can be loaded and has a page where people see it, including quotes, orders, invoices, cases, installed equipment, service contracts, stock and lead times.
- A worker can say where a customer's case stands, as of the last load, and says the time it was true.



A price list load opened: why 12 rows were refused and what changed, shown with the made-up Northcott example. Product design with made-up data.

DROP FOLDERS

A file is dropped
Into the company's folder in the tenant's own Cloud Storage bucket.

→

A notice arrives
Storage notices come in on one Pub/Sub topic. A file is found within a minute.

→

It fits saved rules
Tess loads it, if your settings allow.

→

A new kind of file
Tess drafts rules for a person to approve.

→

Not a table
Returned with a note.

Tess never makes new rules live and never lets a held load go on. A person decides.

FILES BACK TO YOUR CRM

- Written every hour: new prospects, contacts added or changed, conversations as activities, cases raised, stops and opt-outs, and meetings booked.
- Data moves both ways by file: loads come in through Tess, and files go back to the CRM every hour.

THE DAILY DATA SUMMARY

- Each morning: files in, loaded, waiting, returned, and rows sent to exceptions files.
- People can ask Tess "What came in today?" in chat.

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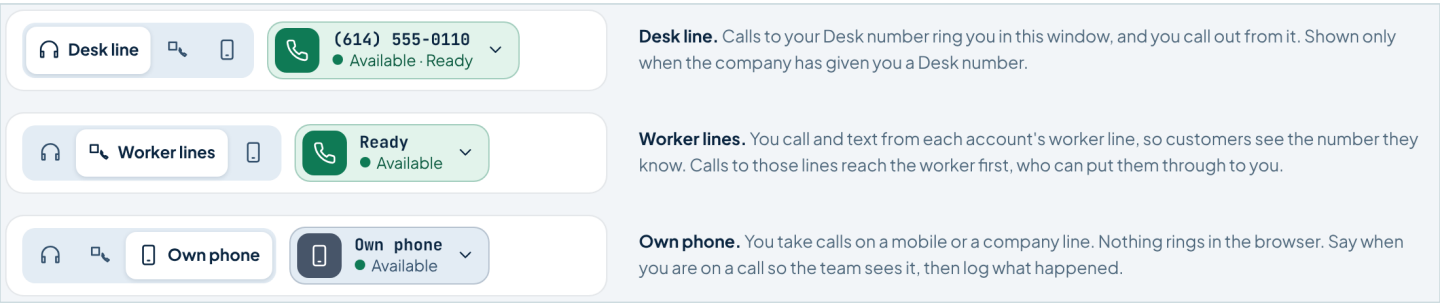
Email, calls and texts on Telnyx.

Each worker has its own email address on your own subdomain and its own number for calls and texts. People can have a Desk line, and the company can keep company numbers. Email, calls and texts run on Telnyx, with WhatsApp on the same provider when it is enabled.

Part	How it works
Addresses	Each worker's address sits on the client's own subdomain, such as morgan@northcott.corvair.live, and each person can have a mailbox there. CVW registers and verifies each subdomain and publishes its SPF, DKIM, DMARC and MX records. Replies are matched by thread.
Email templates	Every email to a customer uses a template from a standard library of layouts, each with a section for a freeform reply. The signature and footer are a separate template.
Who owns a number	Every number has exactly one owner: a worker, a person (one Desk line each) or the company's number pool. Numbers are rented through Telnyx in the country of service, with what the country requires, such as A2P 10DLC brand and campaign registration in the US. Each number has its own messaging profile, so a STOP reaches only that number. A number moves between owners only when no call on it is live.
Company numbers	A table keeps which company number each contact knows, picked once by country, area code and use, and who last used it. A call in to it first rings whoever last called or texted that contact from it within the set days (30 by default), then follows the account's usual route. Worker lines and Desk lines route exactly as before.
The browser phone	Desk lines run in the browser over WebRTC. The line chosen in Call from is the line the call goes out on, after a check that the person may use it.
Voice, listen and join	Telnyx call control streams the audio both ways over a secure WebSocket (L16 at 16 kHz) to the voice engine, which bridges to Gemini Live or ElevenLabs. On a rep's call both sides are transcribed. A manager's Join moves the bridged call into a Telnyx conference, with a stream on her leg so her words are hers. A call nobody joins stays a bridge.
Webhooks	Every Telnyx webhook is signed, and the signature is checked before anything else is done. It then becomes an activity event.



How a person takes calls, a toggle in the header: Desk line, worker lines or own phone, shown with the made-up Northcott example. Product design with made-up data.

SETUP PROVISIONS THE CHANNELS

- Email and website chat for every client; voice, texts and WhatsApp where enabled, each with what the country requires.
- Each channel shows Ready, Waiting or Needs you on Setup live. Texts from a US number wait for its registration. No number is bought without an administrator and Corvair.

KEYS AND SYSTEM EMAIL

- Provider credentials sit in the tenant's Secret Manager and are used through the access broker.
- Mailgun sends only Corvair's own system email: notifications, sign-in and access requests. It never sends a client's email.

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Calls, texts and country profiles.

Each number has its own rule for calls in. Calls out and texts pass the contact gate at the moment they go. Each country's rules are a reviewed profile that the gate applies.

Part	How it works
Calls in	Each number has a rule: ring a person first and the worker after a wait (10 to 60 seconds, 20 by default), the worker answers, or ring a person only. Which person: the account owner, a named person, or whoever is on duty. Out of hours, the worker answers or takes a message. When the worker is full, the least busy worker answers, or it takes a message. One after-hours worker can be set to answer every line out of hours.
Ringing	The caller's account comes up at once on the live desk, with Answer, Let the worker take it, and Voicemail. Unanswered in the set time, the worker answers and the person gets the summary. Voicemail hands the call to the worker, which takes a message and a good time to call back and gives the person a request with it.
Transfer	To the account's worker, which carries on with a summary of what was said, or to a person.
The worker on the phone	Answers with the greeting and the AI notice. It can be watched, listened to, joined and taken over like any conversation. Listening needs the recording notice: a call with no notice cannot be listened to. A person who joins is introduced by name and role, with a fresh notice where the country profile requires it.
Calls out	The customer sees the person's Desk number or the worker's number, attested by the carrier (STIR/SHAKEN in the US). A worker's planned call joins the queue only inside the contact's allowed hours, and the contact gate runs again at dialling, including the country's rules and any do-not-call registry, AI voice consent where a country requires it, and the line's type and use. A number that does not exist is not called again.
Answering machines	The worker leaves one short message: who it is, with the AI notice, why it called, and how to reach us.
Recording	Only after the notice, and never if the customer declines. A person's call is transcribed only where the customer's country allows recording after notice. Audio and transcript go to the tenant bucket and follow its retention periods.
Texts and WhatsApp	The worker's first text to a contact names it as an AI assistant. STOP, START and HELP are handled by the number they were sent to. WhatsApp, when enabled, runs on Telnyx after the same contact gate. Each message joins the contact's one conversation.

COUNTRY PROFILES

Corvair keeps a profile for each country: hours by day, registries, consent by channel and purpose, the AI disclosure in each language, recording consent, frequency limits and number rules. CVW drafts it from official pages, including regulators' own sites. A rule whose quoted words are on the page but not word for word goes to the decision service, which says whether the words support it. An official page CVW's reader cannot open is read fresh through Exa from its official address. A Corvair operator reviews and publishes every profile. Holidays load with their sources, and each country's requirements sit in one place. Profiles are not legal advice.

- **US:** an AI voice is an artificial voice under the TCPA (FCC, February 2024), so marketing calls need prior express written consent; the National Do Not Call Registry, a check good for 31 days, with business numbers outside it; 8am to 9pm local.
- **UAE:** marketing calls 9am to 6pm; the Do Not Call Registry for consumers; calls recorded after notice, asking whether to continue; no call after a refusal.
- **Singapore:** the Do Not Call Registry under the PDPA, a check good for 21 days.
- **Australia:** the Do Not Call Register for calls; texts under the Spam Act; calls on weekdays to 8pm and Saturdays 9am to 5pm.

Greeting, disclosure and consent

Every chat, call and text opens the same way: the greeting, then the AI disclosure from the contact's country profile in the contact's language, naming the company, then the caller's identity and purpose and "Is now a good time to continue?" where the country requires them. A missing language falls back to the team language and is recorded. Registry results are kept as fingerprints, never numbers in clear, and are checked by uploaded results files or a register's own service. The rule that the worker says it is an AI when asked is unchanged.

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Basis for contact and stop scope.

The contact gate runs before every outbound message or call. It reads two records: the basis for contact recorded for the person, and the scope of any stop. A check that cannot run counts as no.

THE BASIS FOR CONTACT

Basis	Recorded with it
Opt-in marketing list	Which list, and what the person agreed to receive
Attendance at an event	Which event, and what attendees were told
An enquiry	What they asked, where and when
An existing customer	The account
An employee referral	Which employee, and how they know the person
An external referral	Who referred them, and whether the person expects the contact
A warm contact of the account team	Which team member, and the relationship
None	Nothing. The person is cold

HOW THE GATE USES IT

- Recorded for each person and purpose, and channel where one was given, with its source and date. A yes or a withdrawal on one channel covers that channel only. It cannot be edited, only withdrawn.
- A list carries its basis when it is loaded. The person loading it says where it came from and what the people agreed to, and that becomes the record for each person.
- One person can be added with a basis. A referral the worker hears in a conversation is recorded the same way.
- The gate reads the country profile for what each basis allows, by channel and by purpose, and picks the allowed channels. A cadence uses only those.
- A person with no allowed channel is not contacted, and shows in the campaign's results with the reason.
- Where the profile sets how long a basis lasts, the gate reads its age from the date.
- Where the person's country and the client's differ, the stricter rule applies.
- Whether a person is cold, dormant or warm is worked out from the records, not typed in.

STOP SCOPE

Where the stop is said	What it stops
In a call or a chat	This call or chat
On an action, or in reply to one message	This action. In reply to a campaign message, that campaign's messages to this person
On an account	Contact on this account
On a worker	This worker
A STOP texted to a number	Texts from that number. Other numbers can still text the person, unless the country requires a wider stop
In wider words, such as "take me off your list"	What the words say, up to every list, channel and worker
In narrower words, such as "don't call me, email is fine" or "not before January"	That channel, or that period

A stop is stored with the words used and the scope applied. A country's profile can widen the scope, and then the wider scope is applied. The rule that a stop is always honoured stays in the sealed core. Promises already made to that person go to their owner.

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Scoring, analytics and improvement.

The records that run the worker also improve it. Sage runs the scoring, the reviews and the coach with the decision service. Every change is a new release of the definition files, tested in simulation before it is promoted, and nothing reaches a worker until a person approves it.

THE LOOP, AND HOW EACH STAGE WORKS

Stage	How it works	Kept in
Record	Each conversation and task run keeps its transcript, the audio for voice (after notice), every tool call and search with its results, the sources used, the definition versions in force, the outcome, the debrief and the scores.	Control database; audio in the tenant bucket; detailed steps in Cloud Storage
Outcome	Whether the step is confirmed or tentative, and how a tentative step will be confirmed; a possible upgrade the customer left open; a stop; and whether the customer said no or refused the contact. Each comes with the line that shows it.	Control database
Score	The rubric is a file in the pack, editable per deployment, turned into typed questions. Each is answered 1 to 5 with a reason and a confidence, citing the transcript lines. A worker's scores, reasons and debriefs are seen by the rep it works for, its supervisor and management. Any view that compares or adds workers and people is management only. Reps are never scored.	Control database
Findings	Three to eight items for each scored conversation, each a strength, an issue or a risk, with its lines.	Control database
Mood and tags	Five levels at the start and end of each conversation, with a confidence. Tags say what each conversation contains. Five of them also send it to the review queue: a worse ending, a complaint, anything said about AI, a request for a named person, or a broken rule.	Control database; the review queue
Analyse	The review queue sorts by mood drop, then flag. A batch review over a period and filters reads every match and ranks the top issues by frequency and cost, with examples. Each can become a lesson, an instruction change, a gap for the library, or work.	A report in the tenant bucket, indexed in the database
Coach	A person adds a comment to a conversation, and the coach writes a debrief and up to six recommendations: a change to the instructions, a lesson, or a note for Corvair. The person ticks the ones they agree with. The coach can also work from a finding across many conversations.	Lesson files: proposed, active or retired, by scope
Approve	Lessons and instruction changes wait for approval, shown against the current version. The conflict check runs when one is proposed, is stored with it, and runs again at approval. A named person approves or declines each. A change that conflicts with the sealed core is refused.	Versioned definition files
Test and promote	The new release is tested against the one in use in simulation, case by case, on every scoring side. A case worse on the customer's side holds it back (next page).	The deployment points at one release
Live watch	After a release is promoted, its first 30 scored live conversations are compared with the release before. Nothing is rolled back without a person.	Control database

Analytics data

Key events, counts and scores in the control database feed scorecards and value. Detailed step records and logs are kept in Cloud Storage for audits and deeper analysis.

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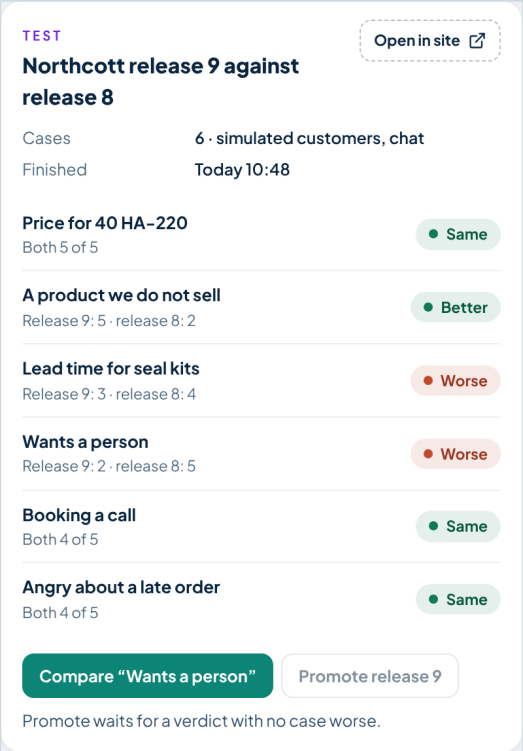
Simulation, tests and the live watch.

A new release meets simulated customers before it meets real ones. It is tested against the release in use, case by case, and watched after it goes live. A person decides each step.

TRAINING AND SIMULATION

- Everything is real unless a person declares it as training (a person plays the customer) or simulation (CVW plays the customer).
- Both run on the live system: the current accounts, memory, prices, notes and lessons. What the worker would have done is held and shown as held. Nothing leaves CVW.
- When it ends, the person saves it to the account, which applies what was held, or discards it.
- Simulation covers outbound as well as inbound. CVW plays the contact, an assistant who may book a time or put the call through, a voicemail, or a wrong person who may name the right one.
- Simulated customers vary by segment and answer the survey in character.
- A simulation run is configured in files: the worker release, situations, simulated customers and their dials, number of runs, rubric, and whether the simulated customer answers the survey. Standard sets ship in the pack; a deployment adds its own.
- Every run is recorded, scored and debriefed like a real conversation, and is never counted in a worker's results.
- A replayed call follows the real customer's lines, and the worker is scored against what the person did.



A test of release 9 against release 8, case by case, shown with the made-up Northcott example. Product design with made-up data.

FROM AN APPROVED CHANGE TO A RELEASE IN USE

Approved
A person approves the lessons and the instruction change.

Tested
The new release against the one in use, case by case, on every scoring side.

Held or promoted
A case worse on the customer's side holds it back.

Live watch
Its first 30 scored live conversations against the release before.

Roll back
If it does worse, the engineer and the client operator are told, with Roll back.

A person rolls back

Nothing is rolled back without a person. Rolling back promotes the previous release, and the deployment always points at one release.

Across deployments

Corvair improves the standard pack from anonymised examples only. Each deployment stays on its release until it upgrades after a side-by-side test.

Lessons stay yours

Pack upgrades never touch a customer's lessons, notes or settings.

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Tags and the tagging pass.

Every conversation is tagged automatically, in three kinds. A tag says what a conversation contains. It is not a score. All tags live in one glossary for each company.

THREE KINDS OF TAG

Kind	Set by	Examples
Happened	The engine, from the record, at the moment it happens	A person nudged the worker, joined or took over. A request was raised. A promise was made. A stop was given. The campaign, the channel and the language.
Mentioned	A pass after the conversation, run with the debrief, matching against the company's records and its keyword list	A product, a part number, a quote or order number, a competitor, a named person, a keyword the client set.
Said	The same pass. The decision service answers each tag as a yes-or-no question, with its evidence lines and a confidence	A price objection, a complaint, a delivery problem, a referral, a contract question, a wish for a person, a remark about AI.

NO NEW TAG WITHOUT A SEARCH OF THE GLOSSARY

Search
The glossary, by name, by other names and by meaning.

→ **A tag fits**
It is used.

→ **A tag is close**
It is shown, and a person chooses it or adds the new word to its other names.

→ **Nothing fits**
A new tag is proposed, with its definition and the lines that prompted it.

→ **A named person decides**
To accept it, merge it into an existing tag, or dismiss it.

The tagging pass never makes a tag by itself. It proposes one for a named person. The same rule holds for a person and for Sage.

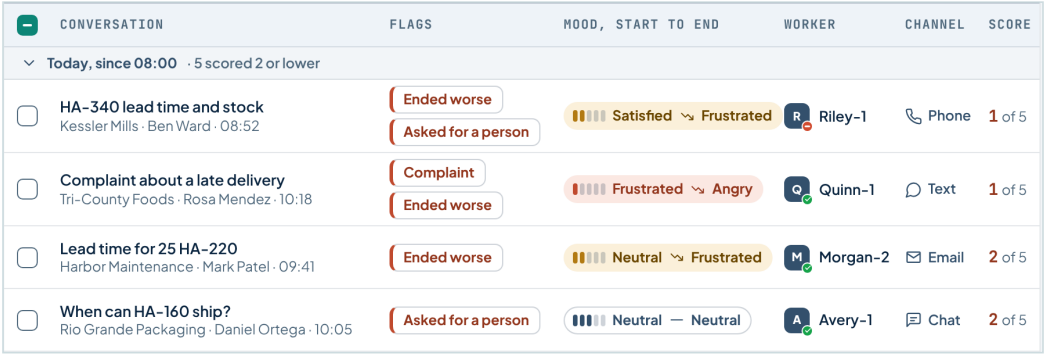
Mentions on a live call. The same matching runs on the live transcript. It marks the products, orders, quotes, competitors, documents and people mentioned, and Brought forward shows a card for each on the live desk. Mentions are matched to records CVW holds, not guessed.

THE GLOSSARY

- Each tag has a name, a definition, other names and examples. A tag in use can be merged into another, which keeps the history of both.
- A product tag is the product's own record. The pass matches what was said against the products the company sells, including the customer's own words for them.
- Sage reports tags that overlap, tags nobody uses, and words that keep appearing with no tag.

HOW TAGS ARE USED

- People find conversations by tag and act on several at once, in the conversations list, in batch review and in reports. A person can add or remove a tag.
- A tag can start work by a rule, such as "a complaint goes to the account owner".
- The five earlier flags are tags that also send the conversation to the review queue: the customer ends worse or angry; complains, may leave or mentions legal action; says anything about AI assistants; asks for a named person or states how they want to be served; or the worker broke an always or never rule.



Flags are tags that also send a conversation to the review queue, which sorts by how far the customer's mood fell, then by flag, shown with the made-up Northcott example. Product design with made-up data.

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Security architecture.

Each worker has its own identity and a short list of standing permissions. It holds no secrets: it is granted access by a broker for one step at a time, and the access ends with the step. One switch, at any level, cuts all access at once.

ACCESS FOR ONE STEP AT A TIME

A step needs a tool
For example, read open orders for this account.

Ask the broker
Worker, clone, system, action, account and work item.

Checked
The standing permission, the stop switch, the mode and calendar, and whether a person must approve.

A short lease
Expires within minutes. The record holds its claims, never the secret.

Released
When the step ends, or on expiry. Every step is an event.

IDENTITY AND PERMISSIONS

People act as themselves. Each person signs in with their own login and role. The MCP service never lets an assistant do more than that person's login allows.

Seats, by role. Each seat opens its own live desk and site. A person sees only the seats their role opens, and a seat changes the desk and the menus, never what the person may do.

Each worker has its own identity. Tied to its tenant, company and deployment. It never uses a person's login. A rename, of a worker or of Sage and Tess, changes no identifier, address or number.

Standing permissions. The system, the action, the scope (its accounts), the modes it applies in, and whether a person must approve. Your administrator sets the list.

Secrets. Every key and token sits in Secret Manager, per tenant, and never in files, prompts, logs, recordings or the model's context. Leases are never renewed silently; permissions expire and refresh on record, and unused ones are flagged.

THE STOP SWITCH

Level	Pressed by
A worker	Its supervisor, your administrator, Corvair
A deployment	Your administrator, Corvair
A company group (the tenant)	Your administrator, Corvair
The platform	Corvair

Pressing it revokes every live lease, refuses new ones, pauses queues and schedules, and ends live conversations with a safe closing line, handing each to a person. It can also revoke a credential at its source. It never trips on its own; restoring needs a named person.

GUARDRAILS IN THE ENGINE, NOT ONLY IN THE PROMPT

Three rules no setting changes
It says it is an AI when asked, and its default greeting also says it. It honours a do-not-contact request, and never offers a commitment a formula or rule did not return. They live in the sealed core, and the engine enforces the third.

Authority is data
Limits are rows the engine reads at each action. Text the worker reads cannot raise them, and a worker cannot change its own limits or grants.

Data rights
Forget requests remove a person everywhere and keep them off future lists and research. Retention per kind of record. Export at any time. Conversations do not train models.

One gate, both ways
A worker or Sage reaches an outside system only through a CVW tool and a connector, and whatever comes back is data. Every Telnyx webhook is signed and checked before anything else is done. Mailgun sends only Corvair's system email, never a client's.

Corvair's access
A grant given for a reason, with an end time: a day by default, which you can change. Every look is listed for your administrators, and you can end it at any time. Each tenant has a type: client, demo or test.

Training is held
In a training or simulation conversation nothing is sent and no system is changed until a person saves it to the account.

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Defences against prompt injection and attacks.

No single layer is trusted to stop an attack. Content is treated as data, the engine holds the limits, and every reply is checked before anyone sees it.

Attack	Where it is stopped	How
Injection in a customer message	What comes in, what it can do, what goes out	The message enters the prompt as marked data. Limits are rows the engine reads, so "ignore your rules" changes nothing. The formula refuses, and the reply check blocks any figure no formula returned.
Injection hidden in a document, email, web page, search result or system reply	What comes in, what it can do	Content enters as marked data with its source. The tools a worker may call are fixed by its standing permissions, and nothing it reads can grant access.
Prompt extraction	The model, what goes out	The sealed core never reaches a browser. A hidden marker in the core is scanned for in every output; a reply that carries it is blocked and raises a safety alert.
Jailbreaks and harmful content	The model, what goes out	Explicit guardrails in every sealed prompt, Gemini's safety filters, and an output check for prohibited content. A failed reply is not shown, and the conversation is flagged.
Malicious uploads	What comes in	Every file is virus-scanned, checked for active and prohibited content, and quarantined until it passes.
Stolen credentials	Access	No secret enters a prompt, log or recording. Access is granted for one step and expires in minutes. Keys sit in Secret Manager, per tenant.
Reaching another tenant's data	Data	Row-level security, forced on every tenant table, plus a storage bucket, memory space and secrets per tenant.
Social engineering	What it can do	A claimed job title gives no authority. Decisions above the limits go to a named person, with a backup.
Floods, bots and web attacks	The edge	Google Cloud Armor rules and rate limits in front of the service.
A forged call or message event	The edge	Every Telnyx webhook is signed, and the signature is checked before anything else is done.
Using the worker to spam or harass	The contact gate	Do-not-contact, consent, local hours and frequency limits before every message. A check that cannot run counts as no.
A generated report with failures	What goes out	A separate scoring pass checks it against the rubric. It is revised once, then rejected and flagged if it still fails.

Safety alerts. Attempted injections, blocked replies, refused actions and leak markers go to the supervisor, and Sage escalates at once. **Your data is yours:** export it at any time; it never trains models. A privacy policy, terms of service, an acceptable use policy and a data processing agreement set the terms.

THE CVW GUIDES: EACH PART IN PLAIN WORDS, AT CORVAIR.AI/CVW

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.

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