

J B Autocare

Distinct Auto Sales

Example Project Specification

Scheduling · Quoting from photos · Follow-up email

Squamish, British Columbia

Prepared by Altumo

This specification was produced from a two-message email thread and public research. Every claim about how the business operates cites a primary source.

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Chapter 1

Scope

1.1 Requests registry (R-###) — THE scope contract

The ask sentence, in full:

“yes”

— Brad, brad@distinctauto.ca, 2026-08-25 17:39, replying to “*Reply yes and I’ll send a short example.*”

One word. It is an unqualified acceptance of the three capabilities named in the out-bound [F-DOC1-004, F-DOC1-010], and it is the whole brief.

Scope is these three requests and nothing else. Ideas Altumo proposes are in [opportunities.md](#) as OPP-### and are **not** part of this contract.

1.1.1 R-001 — Scheduling

Origin: [F-DOC1-004] “scheduling” · accepted by [F-DOC1-010]

Customers can book repair work, and the shop can see and control what it has committed to.

What research constrains (not what it adds): - The shop already runs **AutoOps** for online booking; it is provisioned and live on five of six pages [RES2]. This is not greenfield. - **AutoOps exposes no public API, webhooks or developer documentation** [RES2]. Integration must therefore target the shop-management system underneath, or operate alongside AutoOps on other channels. Which of these is real depends on **OQ4**. - Shop hours are 8:30–5:30 while ~36% of local commuters work out of town [RES4], so any booking model assuming weekday-daytime availability is mismatched to a third of the market.

Open questions: OQ2 (self-booking vs internal bay scheduling vs both), OQ4 (which SMS), OQ5 (is the AutoOps subscription live), OQ11 (repair orders per week)

1.1.2 R-002 — Quoting from photos

Origin: [F-DOC1-004] “quoting from photos” · accepted by [F-DOC1-010]

A customer sends photos of a problem; the system produces a quote from them.

What research constrains: - The shop already promises **“Contact us today for a free cost estimate!”** site-wide [RES1]. This request automates a promise already made, rather than introducing a new one. - **BC has no statutory 10% cap** on estimate overages, unlike Ontario, Manitoba and Alberta [RES3]. There is no legal ceiling binding the final invoice to the photo estimate. - That permissiveness is a trap, not a licence. The binding constraints are the *BPCPA* deceptive-practices provisions and the shop’s own brand promise — its testimonials say **“No costly surprises”** and **“honest”** [RES1, RES3]. - **Therefore, by design:** figures are presented as a range, never a single number; every quote is labelled preliminary pending in-person inspection; and **every quote is approved by Brad before it reaches a customer**. Draft-and-approve, never auto-send [RES3].

Open questions: OQ7 (are written estimates issued today, and by what medium), OQ8 (what happens when actual cost exceeds estimate mid-repair)

1.1.3 R-003 — Writing the follow-up emails

Origin: [F-DOC1-004] “writing the follow-up emails” · accepted by [F-DOC1-010]

The system drafts the customer follow-up correspondence.

What research constrains: - There is **no incumbent to displace** — no newsletter, no CRM, no blog since the 2017 theme demo posts [RES5]. Anything built here is net-new, which makes this the lowest-risk of the three to deliver. - Whatever ships **must not require Brad to maintain a website**. Two abandoned WordPress installs are unambiguous evidence that he will not [RES5]. This is a design constraint, not a criticism — he is running two businesses and turned a cold email around in four minutes. - **[EXT] On the dealership side this is legally constrained, hard**. Only a VSA-registered salesperson may negotiate or conclude a vehicle sale in BC; an AI cannot hold that registration. Every dealership-side message must be draft-only, human-sent, and attributed to a registered person. Prices quoted by email must be the all-in total, and MDAR s.23 disclosures must be complete before a vehicle-specific message can go out [RES6].

Open questions: OQ10 (where enquiries land today; does the contact form deliver and does anyone triage it), OQ12 [EXT] (who is VSA-registered)

1.1.4 Coverage

Request	Origin fact	Research constraints	Status
R-001 Scheduling	F-DOC1-004	RES2, RES4	In scope
R-002 Photo quoting	F-DOC1-004	RES1, RES3	In scope
R-003 Follow-up emails	F-DOC1-004	RES5, RES6	In scope

Three requests. No others exist. Any candidate requirement whose only citation is RES* is re-search and constrains *how*; any whose only citation is Altumo’s judgement is an OPP-###. Neither may be promoted into this table.

1.1.5 The convergence worth noting

R-002 and R-003 arrive at the same mechanism from different directions — the repair shop by commercial argument (a photo quote that under-reads destroys the reputation the testimonials describe, [RES3]) and the dealership by statute (only a registered human may make a price representation, [RES6]). **Brad approves; the system drafts.** One mechanism satisfies both, which is why it is architectural rather than a per-feature setting.

1.2 Proposed opportunities (OPP-###)

These are proposals, not requests. Brad asked for three things: scheduling, quoting from photos, and follow-up emails (see `requests.md`, R-001–R-003). Everything on this page is something Altumo noticed while researching the business. Every item cites the evidence that produced it. Nothing here is something Brad said.

Items marked **[EXT]** concern Distinct Auto Sales, the dealership — itself a scope extension (see DOC1). If the dealership is out, every [EXT] item drops cleanly.

Effort class is already-possible (buildable with what exists today), needs-integration (depends on a system we haven’t confirmed), or needs-a-decision (Brad has to choose something first). No hours, no dates — see Iron Rule 2.

1.2.1 Tier 0 — Fix these first; they cost nothing and Brad can verify them himself

1.2.1.1 OPP-001 · The “Schedule Now” button on the homepage is a dead link

- **Evidence:** RES2, Finding A — `.firecrawl/jbautocare.com.md`
- **Observation:** The homepage “Book Appointment / Schedule Now” call-to-action links to `https://jbautocare.com/` — the page it is already on. A customer who clicks it lands back where they started.
- **Proposal:** Point it at the AutoOps booking flow.

- **Why it pays:** The front page is where most first-time visitors land. Every click on that button today is a customer who tried to book and was silently refused.
- **Effort:** already-possible

1.2.1.2 OPP-002 · The booking widget is on every page except the one that advertises booking

- **Evidence:** RES2, Finding A — widget present on /about/, /our-services/, /contact-us/, /faq/, /testimonials/; **absent from** /
- **Observation:** AutoOps is installed and provisioned (a live API key is in the page source), but not on the homepage — which is the only page carrying the booking CTA.
- **Proposal:** Put the widget on the homepage.
- **Why it pays:** The shop is already paying for online booking that the highest-traffic page cannot reach.
- **Effort:** already-possible

1.2.1.3 OPP-003 · The FAQ page tells customers the shop is at “123 Main Street, Somewhere, USA”

- **Evidence:** RES5 — .firecrawl/jbautocare.com-faq.md
- **Observation:** Unedited theme placeholder is live: a contact block reading “Auto Shop, 123 Main Street, Somewhere, USA, 888 999 1234, john@mechanic.com”, eight FAQ answers all reading “This is an example of text written in response to a question”, a testimonial from “John Doe, Business Owner”, and a banner promising “Contact us 24/7!” against posted hours of 8:30–5:30.
- **Proposal:** Replace with the shop’s real details and eight real answers — drawn from the questions Brad already answers on the phone every week.
- **Why it pays:** A prospective customer comparing two shops sees a placeholder address and a 24/7 promise the shop can’t keep. It costs trust before anyone has spoken to Brad.
- **Effort:** already-possible

1.2.1.4 OPP-004 · [EXT] The dealership’s About page is Lorem ipsum and its inventory is fake

- **Evidence:** RES5 — .firecrawl/distinctauto.ca-about.md, -inventory.md
- **Observation:** distinctauto.ca/about runs literal *Lorem ipsum* under the headings “A Leading Car Dealer For Over 30 Years” and “Since 1983”. The stat counters render with no numbers. /inventory lists three Divi demo vehicles sharing one fake VIN (KMHS15UEXDU209485). The footer credits “©Sea to Sky Energy Solutions 2018” — a different company.
- **Proposal:** Real copy, real stock, correct footer.

- **Why it pays:** Someone shopping for a used car who reaches a dealer page showing three fake cars does not call the dealer.
 - **Effort:** already-possible
-

1.2.2 Tier 1 — The structural one

1.2.2.1 OPP-005 · One customer record across both businesses

- **Evidence:** RES1 (Brad operates both from brad@distinctauto.ca); RES2 (repair bookings live in AutoOps/SMS); RES5 ([EXT] dealership has no visible system at all)
- **Observation:** Brad sells someone a car at Distinct Auto Sales, then services that same car at J B Autocare, for the same person, out of the same mailbox — and **nothing connects the two records**. The dealership does not know its customer is in the service bay; the shop does not know it is servicing a car the owner sold them.
- **Proposal:** One customer and one vehicle record shared by both businesses, keyed on VIN and contact. Every car sold becomes a known service customer with its history attached. Every service visit is visible to the sales side.
- **Why it pays:** This is the highest-value item on the page and the one no competitor will find, because it requires noticing that two different websites are one operator. A dealership that sells a car and never converts that buyer into a service customer is giving away the more profitable half of the relationship. The customers are already Brad's; only the record is missing.
- **Effort:** needs-a-decision — depends on OQ4 and OQ14
- **Regulatory note:** MDAR requires a dealer to keep records of material reconditioning or substantial work on used vehicles (RES6). A shared record makes that a by-product of normal work instead of a separate chore.

1.2.2.2 OPP-006 · [EXT] Reconditioning as a tracked flow between the two businesses

- **Evidence:** RES3 (the *Motor Dealer Act* requires a registered dealer to maintain repair facilities or file a service contract for them); RES6 (MDAR reconditioning records)
 - **Observation:** The likely structural reason both businesses exist as a pair. A car is taken in trade, reconditioned at the shop, then listed on the lot — a flow that today leaves no linked trail.
 - **Proposal:** Track a vehicle from acquisition → shop work → lot-ready, with the work order attached to the listing.
 - **Why it pays:** Satisfies the MDAR record-keeping obligation as a side effect, gives real reconditioning cost per unit, and produces a documented service history that is a genuine selling point on the lot.
 - **Effort:** needs-a-decision
-

1.2.3 Tier 2 — Repair-shop revenue, all grounded in services the shop already offers

1.2.3.1 OPP-007 · Declined-work recovery

- **Evidence:** RES2 — AutoOps' own product material describes surfacing previously declined work at scheduling time, so the shop's platform already treats this as core
- **Observation:** Every shop accumulates recommended-but-declined work. It is the largest pool of already-qualified revenue any shop has, and it is invisible without a system.
- **Proposal:** Capture declines as first-class records with the reason, then resurface them at the next visit and in the follow-up drafts (R-003).
- **Why it pays:** The customer already agreed the work was needed and the diagnosis is already done. It is the cheapest revenue in the building.
- **Effort:** needs-integration

1.2.3.2 OPP-008 · Winter tire changeover campaign

- **Evidence:** RES1 (Tires — "Replacement, rotations, alignments" is an advertised service line); RES4 (Sea to Sky corridor, Highway 99, ~8,500 commuters travelling by vehicle)
- **Observation:** BC's Sea to Sky corridor has designated winter-tire routes and a hard seasonal deadline. Demand is perfectly predictable and arrives all at once.
- **Proposal:** Seasonal outreach to every customer with a known vehicle ahead of the changeover window, booking into the scheduling system (R-001).
- **Why it pays:** Turns an annual demand spike the shop currently absorbs reactively into a bookable, level-loaded pipeline — and a changeover appointment is a natural inspection opportunity.
- **Effort:** already-possible

1.2.3.3 OPP-009 · Tire storage as a retention product

- **Evidence:** RES4 (corridor climate, two tire sets per vehicle); RES1 (tires are an existing service line)
- **Observation:** Customers with two sets of tires need somewhere to keep the off-season set, and many have no space.
- **Proposal:** Track stored tire sets against customer and vehicle, with location and condition on removal.
- **Why it pays:** Storage is a recurring fee, but the real return is retention: a customer whose tires are in your building comes back twice a year without being sold anything.
- **Effort:** already-possible

1.2.3.4 OPP-010 · Mileage-based service reminders

- **Evidence:** RES1 — “Scheduled Maintenance: Services recommended at specific mileage” is already one of the shop’s own advertised service categories
- **Observation:** The shop advertises mileage-based maintenance but has no mechanism to tell a customer their interval has arrived.
- **Proposal:** Record odometer at each visit, project the next interval, and generate a reminder draft for Brad’s approval (R-003).
- **Why it pays:** Converts a service the shop already sells into recurring, scheduled work instead of waiting for the customer to remember.
- **Effort:** already-possible

1.2.3.5 OPP-011 · Capture the newcomers

- **Evidence:** RES4 — Squamish grew **+22.2%** 2016→2021 to 23,819; occupied dwellings up **26.7%** to 9,191
- **Observation:** A town adding households at that rate is continuously producing people who own a car and have no mechanic yet. Whoever they try first usually keeps them.
- **Proposal:** A first-visit path built for someone with no history — easy intake, clear first-time pricing, and a strong follow-up after visit one.
- **Why it pays:** New-resident capture compounds. Each one converted is a decade of service work, and the shop’s own testimonials show 8-year customer tenure is normal here.
- **Effort:** already-possible

1.2.3.6 OPP-012 · Scheduling that fits commuters

- **Evidence:** RES4 — ~36% of Squamish commuters work outside town (~8% Whistler, ~5% Vancouver); shop hours are 8:30–5:30
- **Observation:** A third of the market is out of town during the exact window the shop is open. They cannot drop a car off at 10am on a Tuesday.
- **Proposal:** Early key-drop and after-hours pickup as explicit booking options, with status by text during the day.
- **Why it pays:** Removes the blocking objection for a third of the addressable market — and it is a scheduling feature, so it lands inside R-001 rather than beside it.
- **Effort:** already-possible

1.2.3.7 OPP-013 · Lean into the European specialism

- **Evidence:** RES1 — the shop states it specialises in European models (Audi, Porsche, BMW); the Volvo Club of BC directory lists it for Volvo work
- **Observation:** This is a genuine differentiator that the website mentions almost in passing, in a corridor that runs to Whistler and carries exactly those vehicles.

- **Proposal:** Make the specialism prominent and let customers pick their make at intake so the quoting and follow-up language reflects it.
- **Why it pays:** European service commands a higher rate and faces fewer local competitors than general repair. The shop already has the capability and the third-party listing to back the claim.
- **Effort:** already-possible

1.2.3.8 OPP-014 · Turn four testimonials into a steady review flow

- **Evidence:** RES1 (four real testimonials — Ian B McIlwaine, Barry Sherman, Deena Cox Zenyk, Chris Ford); RES5 (site last touched 2019)
- **Observation:** The shop has genuinely excellent word of mouth — “*ethical repairs*”, “*no costly surprises*”, “*8 years*” — frozen on a 2019 page.
- **Proposal:** After a completed job, generate a review-request draft for Brad’s approval, timed to the customers most likely to say yes.
- **Why it pays:** Local search rankings for “mechanic Squamish” turn heavily on review volume and recency. The satisfaction already exists; only the asking is missing.
- **Effort:** already-possible

1.2.3.9 OPP-015 · Fleet and commercial accounts

- **Evidence:** RES4 — Squamish’s growth implies a growing base of local trades and service businesses running vehicles; RES1 — the shop services all makes
 - **Proposal:** Account-level records for businesses with several vehicles, with consolidated history and billing, and maintenance scheduled around their working week.
 - **Why it pays:** Fleet work is predictable, higher-volume, and far less price-sensitive than retail — and it fills the weekday daytime capacity that retail commuters can’t.
 - **Effort:** needs-a-decision
-

1.2.4 Tier 3 — [EXT] Dealership

1.2.4.1 OPP-016 · [EXT] Trade-in appraisal from photos

- **Evidence:** R-002 (photo quoting, already accepted, for the shop); RES6 (MDAR s.23 disclosure obligations)
- **Observation:** The photo-quoting capability Brad already said yes to for repair work applies almost unchanged to appraising a trade-in.
- **Proposal:** Same intake, same draft-and-approve, with the s.23 disclosure fields (prior taxi/police/racing use, damage over \$2,000, lease/rental, out-of-province, odometer accuracy) captured at appraisal rather than chased later.

- **Why it pays:** Reuses accepted scope for a second revenue line, and front-loads the disclosures the VSA requires anyway.
- **Effort:** needs-a-decision

1.2.4.2 OPP-017 · [EXT] Sold-vehicle service handoff

- **Evidence:** RES1 (the two businesses already describe themselves as partnered); OPP-005
- **Observation:** Every car leaving the lot is a service customer the shop doesn't know about yet.
- **Proposal:** On sale, create the service record automatically — vehicle, owner, in-service date, first interval due.
- **Why it pays:** The single cheapest customer acquisition available to the shop, because the customer is already standing in Brad's other building signing paperwork.
- **Effort:** needs-a-decision

1.2.4.3 OPP-018 · [EXT] Disclosure-complete listings

- **Evidence:** RES6 — MDAR s.23 and s.27
 - **Proposal:** Make the s.23 fields structural on every vehicle record and block publishing or messaging until they are complete, with the s.27 offered price displayed.
 - **Why it pays:** Turns a compliance exposure into a property of the system. It is also a differentiator on the lot: complete, confident disclosure is what a careful used-car buyer is actually looking for.
 - **Effort:** needs-a-decision
-

1.2.5 Tier 4 — Operational

1.2.5.1 OPP-019 · Bay capacity at a glance

- **Evidence:** RES2 (booking exists but is decoupled from the shop's own view of its day)
- **Proposal:** A simple day/week view of committed work against available bay time, so Brad can see what he can actually accept before he accepts it.
- **Why it pays:** Online booking without a capacity view converts an overbooked day into a customer-facing failure. This is the safety valve that makes R-001 safe to turn on.
- **Effort:** needs-integration

1.2.5.2 OPP-020 · The estimate → approval → invoice trail

- **Evidence:** RES3 (BC has no 10% cap, so the shop's own record *is* the defence); RES1 (the shop's brand promise is literally "*no costly surprises*")
- **Proposal:** Keep the photos, the generated estimate, the approved version, the authorisation and the final invoice as one linked, timestamped record.

- **Why it pays:** In BC the protection against a pricing dispute is contractual and evidentiary rather than statutory — so a complete trail is exactly what a shop needs, and it defends the reputation the testimonials describe.
- **Effort:** already-possible

1.2.5.3 OPP-021 · Photo-backed authorisation for scope growth mid-repair

- **Evidence:** RES3, OQ8 (what happens today when actual cost exceeds the estimate is unknown); RES1 (“*JB Autocare was honest and saved me quite a chunk of change. No costly surprises.*”)
- **Observation:** The moment a shop’s reputation is actually made or lost is the phone call saying the job grew.
- **Proposal:** Send the customer the photo of what was found alongside the revised number, and capture their approval against that record before proceeding.
- **Why it pays:** Turns the worst conversation in the shop into the one that produces the review quoted above. It is also the practical answer to BPCPA deceptive-practice exposure (RES3) without any statutory cap to lean on.
- **Effort:** already-possible

1.2.6 Summary

Tier	Items	Character
0	OPP-001 – OPP-004	Broken things, verifiable in seconds, no integration needed
1	OPP-005 – OPP-006	Connect the two businesses Brad already runs
2	OPP-007 – OPP-015	Repair-shop revenue from services already advertised
3	OPP-016 – OPP-018	[EXT] Dealership
4	OPP-019 – OPP-021	Operational safety and evidence

21 opportunities. None of them is a request. All of R-001–R-003 remain exactly what Brad said yes to.

The pattern worth noticing: almost nothing here proposes buying new capability. The shop already advertises scheduled maintenance, tires, inspections and European specialism; already pays for a booking platform; already has a decade of goodwill in its testimonials; already owns

a dealership full of its own future service customers. The recurring finding is not absence — it is **disconnection**.

1.3 Out of scope

1.3.1 Nothing was offered and dropped

The usual signal — three things offered, two taken up — is **absent here**. Brad’s “yes” accepted all three capabilities together [F-DOC1-010]. There is no silently-declined item to record, which is itself worth noting: it means the scope contract is the whole offer.

1.3.2 Excluded because no client statement supports it

Under Iron Rule 3, the following are **not** in scope. Several are good ideas; the good ones are registered as OPP-### in [opportunities.md](#) and marked as Altumo proposals rather than requests.

Excluded	Why	Where it went
Website rebuild for either business	Never mentioned. Both sites are in poor repair [RES5], but that is an observation, not an ask	OPP-003, OPP-004
Replacing AutoOps	Brad never said he was unhappy with it; it may simply be misdeployed [RES2]	OPP-001, OPP-002
Payments / invoicing / accounting	Never mentioned	—
Parts ordering and supplier integration	Never mentioned	—
Marketing automation, ad spend, SEO	Never mentioned	OPP-014 (reviews only)
Inventory management [EXT]	Dealership scope is itself an extension	OPP-018
Anything touching a customer portal or credentialed system	Research was restricted to public pages by rule	—

1.3.3 Excluded because research showed it cannot be built

Excluded	Why
Building on top of the AutoOps API	There is no AutoOps API. No public REST surface, no webhooks, no developer documentation, no SDK [RES2]. AutoOps consumes shop-management-system APIs; it does not expose one. Any proposal to “integrate with AutoOps” is not deliverable and must not appear in a client-facing artifact.
Auto-sending customer quotes	Prohibited by design on the repair side (BPCPA deceptive-practice exposure with no statutory safe harbour in BC, [RES3]) and by statute on the dealership side (only a VSA-registered salesperson may make a price representation, [RES6]).
An AI agent that negotiates or concludes a vehicle sale [EXT]	Requires VSA salesperson registration, which an AI cannot hold [RES6].
Relying on Ontario’s 10%-over-estimate rule as a guardrail	BC has no such rule [RES3]. Importing it would be designing against law that does not apply in this jurisdiction — a mistake a vendor who researched the wrong province would make.

1.4 Open questions (0Q-###)

For **Brad**, on the call. None of these block the spec; all of them shape the build. Ranked — OQ4 is the one that decides the architecture.

1.4.1 Decisive

ID	Question	Why it matters	Source
OQ4	Which shop-management system does J B Autocare run — Tekmetric, Shop-Ware, Shopmonkey, Mitchell 1, Protractor, or none?	AutoOps has no public API [RES2]. The only integration surface is the SMS underneath it. Tekmetric, Shop-Ware and Shopmonkey have documented AutoOps connections and real APIs; the others do not. If the answer is “none”, the system must own the record itself. This single answer selects the architecture.	RES2

1.4.2 Scope-shaping

ID	Question	Why it matters	Source
OQ2	Does “scheduling” mean customer self-booking, internal bay scheduling, or both?	“yes” does not disambiguate; the two are different products	DOC1
OQ5	Is the AutoOps subscription active and paid, or lapsed with the snippet left behind?	Determines whether to build with it or replace it	RES2
OQ7	Are written estimates issued today, and by what medium — paper, text, email, verbal?	Sets the baseline R-002 must improve on	RES3

ID	Question	Why it matters	Source
OQ8	What happens today when actual cost exceeds the estimate mid-repair?	The moment reputation is made or lost; must not be worsened	RES3
OQ11	Roughly how many repair orders per week?	No public signal exists; needed for any capacity work	RES5

1.4.3 Operational

ID	Question	Why it matters	Source
OQ1	Brad's surname	Not published anywhere; needed before the reply is sent	DOC1
OQ6	Was the booking widget's omission from the homepage deliberate?	Changes whether OPP-002 is a fix or a decision	RES2
OQ9	Who administers the WordPress sites — is Actuate Communications still engaged?	Determines who can action the Tier 0 fixes	RES5
OQ10	Where do enquiries land today? Does the contact form deliver, and does anyone triage it?	R-003 has to write into a real workflow	RES5

1.4.4 [EXT] Dealership

ID	Question	Why it matters	Source
OQ12	Is the VSA dealer licence current, and who besides Brad is a registered salesperson?	Only registered humans can be in the approval queue	RES6
OQ13	Where does real vehicle inventory live? The public page is Divi demo data	Nothing to integrate with until this is known	RES5
OQ14	Does the dealership use a DMS, or spreadsheets?	Dealership-side counterpart to OQ4	RES6

1.4.5 Unverified claims

ID	Question	Why it matters	Source
OQ3	Founding dates conflict: “Since 1983” / “Over 30 Years” appear on the dealership site <i>inside a block of Lorem ipsum</i> , while a third-party profile gives JB Autocare’s founding as 1996	Do not print a founding date in any client-facing artifact until confirmed	RES1

14 open questions. They belong on the call, not in the reply email.

Chapter 2

Overview

2.1 Problem statement

J B Autocare has a reputation most shops would envy and almost no machinery to act on it.

Its own customers, in their own words on its own website, call it “*honest*”, praise “*ethical repairs*”, note “*no costly surprises*”, and one counts **eight years** of repeat business [RES1]. That reputation was earned at the counter over decades in a town of 23,819 people that has grown **22.2% in five years** [RES4].

The machinery around it has not kept up:

- The “**Schedule Now**” button on the homepage links to the homepage [RES2]. Every customer who has clicked it was silently refused.
- **Online booking is installed and paid for, on five of six pages — but not the homepage**, which is the one page that advertises booking [RES2].
- The FAQ page tells customers the shop is at “**123 Main Street, Somewhere, USA**” and answers eight questions with “*This is an example of text written in response to a question*” [RES5].
- The shop promises “**a free cost estimate**” site-wide, with no mechanism behind it beyond a phone call [RES1].
- It advertises **mileage-based scheduled maintenance** with no way to tell a customer their interval has arrived [RES1].
- Its sister dealership sells cars to people who then become service customers, and **nothing connects the two records** [RES1, OPP-005].

None of this is about how Brad fixes cars. It is about the distance between a business that works and a set of tools that were installed once and never finished — which is what happens when one person runs two businesses and answers his own email in four minutes.

2.1.1 What Brad asked for

Three things, accepted in a single word: **scheduling, quoting from photos, and writing the follow-up emails** [F-DOC1-004, F-DOC1-010].

2.2 Current state

How work reaches J B Autocare today, from the public evidence.

flowchart TD

```

A["Customer has a problem"] --> B{"How do they reach the shop?"}
B -->|"Phone (604) 815-0085"| C["Brad or the counter"]
B -->|"Contact form"| D["Email to brad@distinctauto.ca"]
B -->|"Clicks 'Schedule Now' on the homepage"| E["Returns to the homepage<br/>DEAD"]
B -->|"Finds AutoOps on an inner page"| F["AutoOps booking widget<br/>5 of 6 pages"]
C --> G["Verbal estimate"]
D --> C
F --> H["Shop-management system?<br/>UNKNOWN – OQ4"]
G --> I["Work done"]
H --> I
I --> J["Customer leaves"]
J --> K["No follow-up<br/>No reminder<br/>No review request<br/>RES5"]
E -. ->|"customer gives up<br/>or phones instead"| C

```

2.2.1 What the evidence shows

Path	Status
Phone	Works. Probably carries most of the load.
Contact form	Exists — Email, First Name, Last Name, Phone, Message. Whether it delivers is OQ10 .
Homepage “Schedule Now”	Broken . Links to itself [RES2].
AutoOps widget	Live and provisioned, on every page except the homepage [RES2].
Shop-management system	Unknown — OQ4 . The single most important gap.
After the visit	Nothing. No newsletter, no CRM, no reminders since the 2017 theme demo posts [RES5].

The inversion is the finding: **the page that advertises booking cannot take one, and the pages that can take one do not advertise it.**

2.3 Vision

Brad's stated position is one word, and it is worth respecting exactly what it does and does not contain.

“yes” — [Q-DOC1-001]

He accepted, without qualification, an offer of three capabilities: **scheduling, quoting from photos, and writing the follow-up emails** [F-DOC1-004, F-DOC1-010]. He stated no vision, no goal, no constraint, no volume and no timeline [F-DOC1-009].

This document therefore does not put words in his mouth. What follows is Altumo's reading of what those three capabilities are *for*, given the business the research describes — and it is offered as a reading, to be corrected on the call.

2.3.1 The reading

The shop's problem is not capability. It already does computer diagnostics, brakes, exhaust, tires, alignments, batteries, engine and transmission work, heat and A/C, scheduled maintenance, and a 100-point pre-purchase inspection [RES1]. It already specialises in European makes. It already has the reputation.

The problem is **continuity** — every interaction ends when the customer drives away, and begins again from nothing when they come back. There is no thread connecting a photo to a quote to a job to a follow-up to the next reminder, and no thread at all between the dealership that sold the car and the shop that services it.

The three things Brad said yes to are, read together, exactly that thread:

- **Quoting from photos** starts the conversation before the car arrives.
- **Scheduling** turns the conversation into a booking without a phone call during hours a third of the town is commuting through [RES4].
- **Follow-up emails** keep the thread alive after the car leaves.

2.3.2 The one thing that must not change

Whatever gets built, the customer's experience must stay the one the testimonials describe: **honest, and no costly surprises** [RES1]. A photo quote that under-reads and doubles at the counter would damage in a season what took decades to build — and in British Columbia there is no statutory estimate cap to stop it [RES3]. That is why every quote in this spec is a range, and why every message waits for Brad.

2.4 The delivered system

One release. Everything described here ships together [Iron Rule 1].

2.4.1 The story Brad can tell

A customer in Squamish notices a grinding noise. Instead of phoning during a working day she may be spending on Highway 99, she photographs the wheel and sends it from the shop's website — no account, no app.

Brad sees it in a short queue between jobs. The system has already drafted a quote from the photos: **a range, not a number**, with the reason the range is wide written out — the pads are visibly worn and the rotor is scored, but the caliper slides can't be seen from outside. He reads it, adjusts a line, and presses approve. The message goes out in his voice, offering an early key drop because her record says she commutes to Whistler.

She books the slot herself. It lands on a board that shows the shop what it has actually committed to, so nobody promises a Thursday that is already full.

Her car goes on the hoist. The technician finds the rear pads are also below spec — photographs them against a gauge from the bay, and the system drafts the revised number with the photo attached. Brad approves; she sees the evidence and the price together, and says go ahead. **Her answer is recorded against the job**, which in a province with no statutory estimate cap is the only protection either party actually has.

The work is done. A follow-up goes out — again drafted, again approved — noting that she is approaching her next interval, and that the rear pads she declined last June are still open. In October, when winter tires come due on the corridor, her set is in rack B-14 and the draft that reaches Brad already knows it.

And because the same record covers both of Brad's businesses, the system knows she bought the car from Distinct Auto Sales in 2021 — so the dealership can see its customer is being looked after, and the shop knows the history of the car it is working on.

2.4.2 What holds the whole thing together

Brad approves; the system drafts. Nothing reaches a customer without him.

That single rule is arrived at twice, independently: commercially, because a photo quote that under-reads destroys the reputation his customers already write about [RES3]; and legally, because on the dealership side only a VSA-registered salesperson may make a price representation, and an AI cannot hold that registration [RES6].

When a commercial argument and a statutory one produce the same design, it stops being a preference and becomes architecture.

2.4.3 What is in the release

Requested

Scheduling · quoting from photos · follow-up emails

Proposed	21 opportunities, ranked, each marked and evidence-cited
[EXT]	Dealership inventory, disclosures, trade-in appraisal, sales follow-up
Packaging	Training program, docs, web docs, 11ms.txt, unit tests, API + MCP
Screens	24

2.5 Glossary

Term	Meaning
AutoOps	Customer-facing scheduling platform for repair shops, installed on jbautocare.com. Integrates outward into shop-management systems; exposes no public API [RES2].
BPCPA	<i>Business Practices and Consumer Protection Act</i> , SBC 2004 c.2. BC's general consumer statute — prohibits deceptive and unconscionable practices. Contains no motor-vehicle-repair estimate rule [RES3].
MDAR	<i>Motor Dealer Act Regulation</i> , BC Reg. 447/78. Governs BC vehicle dealers — s.23 disclosures, s.27 display [RES6].
s.23 disclosures	Five mandatory used-vehicle disclosures: taxi/police/racing use; damage over \$2,000; lease/rental; brought into BC for sale; odometer accuracy [RES6].
All-in price	The total consumer price including mandatory fees. Must be identical across advertising, phone, text and email [RES6].
VSA	Vehicle Sales Authority of BC. Regulates dealers and registers salespeople. An AI cannot hold a salesperson registration [RES6].
SMS	Shop-management system — Tekmetric, Shop-Ware, Shopmonkey, Mitchell 1, Protractor. Which one J B Autocare runs is OQ4 .

Term	Meaning
Sea to Sky corridor	Highway 99 between Vancouver, Squamish and Whistler. Winter tire requirements apply seasonally.
Declined work	Work recommended and not authorised. The largest pool of pre-qualified revenue a shop has [OPP-007].
[EXT]	Dealership scope — an Altumo extension, not part of Brad's ask.
OPP-###	A proposal by Altumo. Never a request.

Chapter 3

Evidence

3.1 DOC1 — Email thread (verbatim transcription)

Source: Screenshot supplied by user, 2026-08-25. Transcribed exactly; not paraphrased. **Status:** Complete thread as supplied — two messages, no collapsed “N more messages” indicator visible.

3.1.1 Message 2 (the reply — THE SCOPE CONTRACT)

Subject: RE: what could AI actually do for J B Autocare? **From:** brad distinctauto.ca brad@distinctauto.ca **To:** Clyde Camden clyde@myaltumo.com **Date:** Tuesday, Aug 25, 2026 at 5:39 pm

yes

3.1.2 Message 1 (the outbound — CONTEXT ONLY, NOT SCOPE)

From: Clyde Camden clyde@myaltumo.com **Sent:** Tuesday, August 25, 2026 5:35 PM **To:** brad distinctauto.ca brad@distinctauto.ca **Subject:** what could AI actually do for J B Autocare?

Hi Brad,

Not much of the hype applies to J B Autocare. What does: scheduling, quoting from photos, and writing the follow-up emails. We're Vancouver engineers who build those tools and stick around after they ship.

Reply yes and I'll send a short example.

Clyde

3.1.3 What this establishes

Fact	Evidence	Confidence
The ask sentence is the single word “yes”	Message 2, full body	Certain
Reply latency was 4 minutes (5:35pm to 5:39pm)	Both timestamps	Certain
“yes” answers “Reply yes and I’ll send a short example”	Message 1 closing line	Certain
Three capabilities were offered: scheduling, quoting from photos, follow-up emails	Message 1, sentence 2	Certain
Prospect contact is Brad , addressed by first name	Message 1 salutation	Certain
Subject names “J B Autocare” ; reply comes from distinctauto.ca	Headers	Certain
Altumo positioned as Vancouver engineers who stay post-ship	Message 1, sentence 3	Certain

3.1.4 Scope note

“yes” is an unqualified acceptance of the offer as stated. It neither narrows nor extends it. Under the provenance rule, scope is therefore exactly the three capabilities named in Message 1 - scheduling, quoting from photos, follow-up emails - and **nothing else**, because nothing else was offered and nothing else was asked for.

Nothing was offered-but-dropped. All three items were accepted together. This is the uncommon case where the outbound *does* define scope, because the reply adopted it whole.

No system was named by the prospect. Message 2 contains no incumbent, no constraint, no volume, no timeline. Every such fact in this spec is therefore sourced from research (see source/research/) and is labelled as inference, never as something Brad said.

Two businesses appear in one thread. The subject line names J B Autocare (the repair shop); the reply comes from the Distinct Auto Sales domain. Research (RES1) confirms Brad operates

both, from one mailbox.

SCOPE EXTENSION - flagged for provenance. This spec covers **both businesses**: J B Autocare *and* Distinct Auto Sales. That is a decision made by Altumo on 2026-08-25, on the reasoning that all three accepted capabilities apply to both halves of Brad’s operation and he runs them as one business day.

It is **not** something Brad asked for. The thread establishes scope for the repair shop only. Every dealership-side requirement in this spec is therefore marked [EXT] and traced to this decision rather than to DOC1. If Brad says on the call that the dealership is out, everything marked [EXT] drops without touching the repair-shop spec.

This distinction must survive into the traceability matrix. It is the difference between “we understood your whole operation” and “we invented half of this”.

3.1.5 Open questions raised by this document

- **OQ1** - Brad’s surname is not given in the thread or on either website. Confirm with Clyde before the reply is sent.
- **OQ2** - Whether Brad read “scheduling” as customer self-booking, internal bay scheduling, or both. “yes” does not disambiguate.

3.2 F-DOC1 — Fact registry: the email thread

Source: email-thread.md. Weight: **primary — the only source that can originate scope.**

ID	Fact	Cites
F-DOC1-001	Brad replied to Clyde Camden’s cold outbound with the single word “yes”	Q-DOC1-001
F-DOC1-002	The reply arrived 4 minutes after the outbound (17:35 → 17:39, 2026-08-25)	headers
F-DOC1-003	“yes” was the response to “Reply yes and I’ll send a short example”	Q-DOC1-002
F-DOC1-004	The outbound offered exactly three capabilities: scheduling, quoting from photos, writing follow-up emails	Q-DOC1-003
F-DOC1-005	The outbound framed most AI hype as inapplicable to J B Autocare	Q-DOC1-004

ID	Fact	Cites
F-DOC1-006	Altumo was positioned as Vancouver engineers who remain engaged after shipping	Q-DOC1-005
F-DOC1-007	The prospect's contact name is Brad; his surname was not given	salutation
F-DOC1-008	The subject line names "J B Autocare"; the reply came from brad@distinctauto.ca	headers
F-DOC1-009	Brad stated no incumbent system, constraint, volume, budget or timeline	full body
F-DOC1-010	Brad did not narrow the offer — all three capabilities were accepted together	Q-DOC1-001

3.2.1 Quotes

ID	Quote	Speaker
Q-DOC1-001	"yes"	Brad
Q-DOC1-002	"Reply yes and I'll send a short example."	Clyde Camden
Q-DOC1-003	"What does: scheduling, quoting from photos, and writing the follow-up emails."	Clyde Camden
Q-DOC1-004	"Not much of the hype applies to J B Autocare."	Clyde Camden
Q-DOC1-005	"We're Vancouver engineers who build those tools and stick around after they ship."	Clyde Camden

3.2.2 Extraction note

Ten facts and five quotes is the *entire* client-originated evidence base. F-DOC1-004 is the load-bearing one: because Brad accepted without qualification (F-DOC1-010), the capabilities named in the outbound become the scope contract. This is the narrow case where the outbound defines scope — not because a pitch is scope, but because the reply adopted it whole.

Facts F-DOC1-004 and F-DOC1-010 together are the *sole* justification for R-001–R-003. Every other statement anywhere in this spec traces to research (RES1–RES6) and therefore constrains **how**, never **what** — or is registered as a proposal (0PP-###).

3.3 RES1 — Business identity

3.3.1 Conclusion

Brad operates two businesses in Squamish, BC. The spec is for **J B Autocare**, the repair shop named in Clyde’s subject line.

	J B Autocare	Distinct Auto Sales
What	Full-service auto repair	Used vehicle sales
Address	38918 Progress Way SS1 #9, Squamish BC V8B 0K7	1123 Enterprise Way, Squamish BC V8B 0E8
Phone	(604) 815-0085	(604) 567-1113
Email	brad@distinctauto.ca	brad@distinctauto.ca
Hours	8:30am–5:30pm	Mon–Fri 10am–5pm; Sat/Sun by appointment
Site	jbautocare.com	distinctauto.ca

3.3.2 How the domain/subject mismatch was resolved

Clyde’s subject says “J B Autocare”; Brad replied from brad@distinctauto.ca. Three independent primary sources confirm one operator:

1. **jbautocare.com/contact-us/ publishes brad@distinctauto.ca** as the repair shop’s own contact address — the shop lists the dealership’s mailbox as its own. ([.firecrawl/jbautocare.com-contact-us.md](#))
2. **distinctauto.ca names the partnership in its own words:** “In partnership with JB Autocare, we offer a wide range of auto mechanic services in Squamish.” ([.firecrawl/distinctauto.ca.md](#))
3. **Volvo Club of BC Resource Directory** (rev. 24 Feb 2025) lists: “JB Autocare, 604-815-0085, **Brad**, 38918 Progress Way, Squamish BC V8B 0K7, brad@distinctauto.ca, general repair; have experience with Volvos but not classic Volvos” — an independent third-party directory tying the name Brad to both. <https://www.volvoclubofbc.com/classified/pdf/VCBC-Resource-Directory-rev6-24Feb2025.pdf>

Jurisdiction: British Columbia. Squamish, in the Sea to Sky corridor. See RES3.

3.3.3 In their own words (quotable)

- “We provide our customers with the most comprehensive and efficient automotive service in the Squamish. At JB Autocare our customers are #1, we treat our customers and staff with honesty, courtesy and and dignity.” (*sic* — *doubled “and”*) — jbautocare.com
- “**Contact us today for a free cost estimate!**” — jbautocare.com, repeated site-wide
- “We provide the people of the **Sea to Sky corridor** with quality used cars and trucks at an affordable price!” — distinctauto.ca/about
- “We equip our facilities (*sic*) and technicians with the most up-to-date tools, equipment and information resources available.” — jbautocare.com

3.3.4 Services J B Autocare actually names

From jbautocare.com/our-services/ and the site’s own service-selector widget:

Computer Diagnostic · Brakes (issues, pads, rotors, inspection) · Oil Changes (oil, filters, lube) · Exhaust · Tires (replacement, rotations, alignments) · Tire Alignment · Vehicle Inspection (**100 Point Complete, Pre-purchase**) · Battery (replacement, testing, starter) · Engine & Transmission (issue diagnosis, fluids, drivetrain) · Heat or A/C (no heat, no AC, intermittent) · Scheduled Maintenance (by mileage) · Lighting & Bulbs

Specialism, per a third-party profile: “We specialize in Europe (*sic*) models, but service all makes and models” — Audi, Porsche, BMW. Founded 1996.

3.3.5 Real customer testimonials (verbatim, from their own site)

“Friendly, good pricing, ethical repairs, and just a great shop in this community.” — **Ian B McIlwaine**

“These guys have been working on my truck for 8 years. Always professional.” — **Barry Sherman**

“JB Autocare was honest and saved me quite a chunk of change. No costly surprises.” — **Deena Cox Zenyk**

“No hassle, excellent service. Thanks so much, it seems rare to get this kind of service today.” — **Chris Ford**

“**No costly surprises**” and “**honest**” recur. This is the shop’s self-identified brand promise and it directly constrains how photo-based quoting must behave (see RES3).

3.3.6 Open questions

- **OQ1** — Brad’s surname. Not published on either site or in the Volvo directory.

- **OQ3** — “A Leading Car Dealer For Over 30 Years” / “Since 1983” appear on distinctauto.ca/about, but *inside a block of unedited Lorem ipsum*. A third-party profile gives JB Autocare’s founding as 1996. Treat all three dates as unverified.

3.4 RES2 — The incumbent: AutoOps (THE DECISIVE CONSTRAINT)

3.4.1 Conclusion

J B Autocare already has an online-scheduling product installed: AutoOps. Brad never mentioned it — it was found in the page source. It is **half-deployed**, and it is a **closed platform with no public API**. Both facts change what is buildable.

3.4.2 Evidence it is installed

<https://jbautocare.com/faq/> loads two AutoOps resources:

```
src="https://portal.autoops.com/chat?apiKey=ccd9ff14146d44f5b9e36ff7df3ded28"
src="https://portal.autoops.com/_next/image?url=%2FPoweredByAuto0ps.webp&w=384&q=75"
href="https://www.autoops.com/customer-experience"
```

The live API key is present in the public page source, so this is a real provisioned account, not a leftover trial snippet.

The rendered widget presents a genuine multi-step service picker using **J B Autocare’s own service lines** (not theme defaults): Oil Change · Vehicle Inspection “100 Point Complete, Pre-purchase” · Tires · Battery · Engine & Transmission · Heat or A/C · Scheduled Maintenance · Lighting & Bulbs → “Describe Your Issue” → “Select Specific Part” → **Next**.

3.4.3 Finding A — the deployment is inverted

Widget presence by page (`grep -c autoops over .firecrawl/`):

Page	AutoOps widget	“Schedule Now” button
/ (homepage)	× absent	✓ present
/about/	✓	✓
/our-services/	✓	✓
/contact-us/	✓	×
/faq/	✓	×
/testimonials/	✓	×

The homepage is the only page without the booking widget, and the only page that advertises booking. Worse, its “Book Appointment / Schedule Now” call-to-action links to

<https://jbautocare.com/> — the homepage itself. A customer who lands on the front page, sees “Schedule Now” and clicks it is returned to where they started.

This is not a hypothesis; it is in the markup. It is also the cheapest fix in the entire engagement, and it should be said plainly rather than sold.

3.4.4 Finding B — AutoOps has no public API (the hard constraint)

Research across AutoOps’ own documentation and the Steer CRM knowledge base:

- **No public REST API.** No endpoint reference, no OpenAPI/Swagger spec, no authentication guide, no SDK, no developer signup, no webhook event catalogue.
- AutoOps integrates **outward** into shop-management systems, consuming *their* APIs — documented for **Tekmetric**, **Shop-Ware**, and **Shopmonkey**. (<https://help.steercrm.com/knowledge/connecting-your-shop-management-system-to-autoops>)
- Docs use “Steer” and “AutoOps” interchangeably, indicating a brand/platform relationship.
- Integrations with Mitchell 1, Protractor, R.O. Writer or AutoLeap are **not** publicly verifiable.

3.4.4.1 What this means for the build

You cannot build on top of AutoOps. There is nothing to build on.

The integration surface is the **shop-management system underneath AutoOps**, not AutoOps itself. Three viable paths, in preference order:

1. **Integrate with the SMS directly** (Tekmetric / Shop-Ware / Shopmonkey all have real APIs). AutoOps keeps taking bookings; Altumo’s tooling reads and writes the same SMS. *Requires knowing which SMS Brad runs — see OQ4, the single most important open question.*
2. **Request AutoOps partner/API access.** Possible, vendor-gated, not a plan you can commit to on a timeline.
3. **Operate alongside AutoOps** on email/SMS/photo channels, writing back to the SMS rather than to AutoOps. Lowest coupling; works even if OQ4 resolves to “no SMS at all”.

Path 3 is the honest default for a fixed-scope first phase, because it is the only one that survives every answer to OQ4.

3.4.5 Why this matters competitively

Any vendor pitching Brad “AI scheduling” without opening his page source will assume a green-field booking build. He already has booking. The real problems are that it is on the wrong pages and that his front-door CTA is dead — and that whatever gets built must reach his shop-management system, not his booking widget.

3.4.6 Open questions

- **OQ4 — Which shop-management system does J B Autocare run (Tekmetric, ShopWare, Shopmonkey, Mitchell 1, Protractor, or none)?** Determines which of the three paths is real. **Highest-value question on the call.**
- **OQ5 —** Is the AutoOps subscription active and paid, or lapsed with the snippet left behind?
- **OQ6 —** Was the widget's omission from the homepage deliberate or an oversight?

3.5 RES3 — BC regulatory context for photo-based quoting

3.5.1 Conclusion

British Columbia has no statutory 10% cap on auto-repair estimate overages. This is the opposite of what most practitioners assume, because Ontario and Manitoba both have one and they are the commonly cited references.

3.5.2 What BC does NOT have

BC has **no motor-vehicle-repair-specific estimate statute**. Specifically, there is no BC equivalent of:

- **Ontario**, *Consumer Protection Act*, 2002, s. 58 — final invoice may not exceed the written estimate by more than 10%.
- **Manitoba**, *Motor Vehicle Work and Repairs Regulation* M.R. 30/2013 — written estimate mandatory above \$100, with a prescribed 17-field content list, and charges capped at estimate + 10% to a maximum of \$100.
- **Alberta**, Bill 203 s. 57.5 — “No repairer shall charge... an amount that exceeds the estimate by more than 10 per cent.”

3.5.3 What BC does have

Repair work in BC is governed by:

1. **The contract itself** — the written estimate, work order, and authorization define the agreed scope and price. Ordinary contract law and common-law remedies apply.
2. **The *Business Practices and Consumer Protection Act*, SBC 2004, c. 2** — general prohibitions on **deceptive acts or practices** and **unconscionable acts or practices**. The statutory definition of a deceptive act expressly reaches representations made in contracts and other supplier documents. https://www.bclaws.gov.bc.ca/civix/document/id/complete/statreg/04002_00

The BPCPA is **not an estimate-variance formula**. It does not authorise estimate + 10%, and it does not require re-authorisation at any particular percentage. But a quote capable of misleading a consumer is exposure regardless of the number attached to it.

3.5.4 Motor Dealer Act / Vehicle Sales Authority scope

The *Motor Dealer Act* (RSBC 1996, c. 316) regulates **vehicle sales**, not repair. A “motor dealer” is defined by engagement in the sale, exchange or disposition of motor vehicles. Independent repair shops are not motor dealers merely by repairing vehicles.

Relevant to Brad specifically: he operates a dealership *and* a repair shop. Distinct Auto Sales is within VSA scope; J B Autocare is not. The Act does require a registered motor dealer to maintain repair facilities or file a service contract for them — which is plausibly the structural reason the two businesses exist as a pair. **This is an inference from statute, not something Brad has stated.**

3.5.5 Design consequence for “quoting from photos”

BC’s permissiveness is a **trap, not a licence**:

- **Legally**, an AI-assisted photo quote in BC is *less* constrained than in Ontario. No 10% ceiling binds the final invoice to the photo estimate.
- **Commercially**, it is the shop’s own brand promise that binds. J B Autocare’s published testimonials say “**No costly surprises**” and “**honest**”. A photo quote that under-reads and doubles at the counter destroys exactly the reputation those quotes describe — with no regulator needed to make that expensive.
- **Under the BPCPA**, a photo quote presented as a firm price when it cannot be one is a candidate deceptive act.

Therefore the system must, by design and not by preference:

1. Present photo-derived figures as an explicit **range**, never a single number.
2. Label every photo quote as preliminary and **conditional on in-person inspection**.
3. Route every quote through **Brad’s approval before it reaches a customer** — draft-and-approve, never auto-send.
4. Retain the photos, the generated estimate, the approved version and the final invoice as one linked record, so any dispute is answerable from evidence.

Point 3 is the load-bearing one. It is also what makes the feature safe to ship in a jurisdiction that will not otherwise stop you.

3.5.6 Open questions

- **OQ7** — Does J B Autocare currently issue written estimates before work, and by what medium (paper, SMS text, email, verbal)?
- **OQ8** — What is the shop’s current practice when actual cost exceeds the estimate mid-repair? Establishes the baseline the tooling must not worsen.

3.6 RES4 — Squamish market context and sample-data rules

3.6.1 Squamish, BC (2021 Census, District Municipality)

Measure	Value
Population	23,819
Growth 2016→2021	+22.2% — among the fastest-growing municipalities in BC
Median age	37.6
Occupied private dwellings	9,191 (+26.7% from 2016)
Avg household size	~2.59

Source: Statistics Canada 2021 Census profile, DGUID 2021A00055931006.

Commuting (Squamish census agglomeration): ~7,700 residents report a usual workplace; ~2,800 (**36%**) work outside Squamish — roughly **8% commute to Whistler, 5% to Vancouver**. Of ~10,000 reporting a commute, ~8,500 travel by vehicle (~7,800 drivers).

3.6.1.1 What this means commercially

- A town of 9,200 households growing 22% in five years is **acquiring vehicles and acquiring newcomers who have no established mechanic**. First-time-customer capture is worth more here than in a static market.
- A 36% out-of-town commuter share means a meaningful customer segment **cannot drop a car off at 10am on a Tuesday**. Booking that assumes weekday-business-hours availability is mismatched to a third of the market — directly relevant to the scheduling scope item.
- Heavy car dependence and mountain-corridor driving (Sea to Sky Highway 99, winter conditions) supports the brake/tire/alignment service mix the shop already advertises.

3.6.2 Sample-data composition rules (BINDING on the prototype)

Squamish is **~85% not-a-visible-minority**, with a **~15% racialized population** (largest groups South Asian, Chinese, Filipino, Southeast Asian) and a distinct **~8–9% Indigenous population** — Squamish is on Squamish Nation (Sk̓wx̓wú7mesh Úxwumixw) territory, and Indigenous identity is a separate Census concept that must not be folded into the visible- minority figure.

Mother tongue is ~80% English, ~1–2% French, with German, Punjabi, Mandarin, Spanish, Cantonese, Tagalog and Portuguese each present in small shares.

This is **corroborated by the shop's own published testimonials** — Ian B McIlwaine, Barry Sherman, Deena Cox Zenyk, Chris Ford — an Anglo-majority pattern consistent with the census.

3.6.2.1 Therefore, prototype sample customers must:

- Be **majority Anglo/European-origin names**, matching both census and the shop's own testimonial page.
- Include a **real minority share** — South Asian, Chinese, Filipino, German, Latin American — at roughly census proportion, not tokenised and not absent.
- Include **Indigenous representation**, appropriate to Squamish Nation territory.
- Skew to the **late-20s-to-40s** working-age band around the 37.6 median, while including older long-tenure customers — one testimonial says “**8 years**” of repeat business.
- Include at least one **Whistler or Vancouver commuter** whose availability constraints are visible in the scheduling screens.

Do not invent a demographic profile that misrepresents the practice back to its owner. Brad knows exactly who walks through his door. Sample data implying a customer base he does not have is the fastest way to lose credibility in the first thirty seconds of the prototype.

3.6.3 Vehicle mix for sample data

The shop states it specialises in **European models** — Audi, Porsche, BMW — while servicing all makes. Sea to Sky reality adds trucks, SUVs and AWD wagons; one testimonial references “my truck”. Sample vehicles should therefore span a European core (Audi, BMW, VW, Volvo — the Volvo Club of BC directory lists them for Volvo work) plus the pickups, Subarus and SUVs a mountain corridor actually runs. Winter tire changeovers are seasonal reality in the corridor.

Do not reuse the fake VIN KMHS15UEXDU209485 that appears on all three demo vehicles on distinctauto.ca — it is Divi theme placeholder data, not real inventory.

3.7 RES5 — Current-state audit of J B Autocare's digital presence

Every finding below is verifiable in the crawled markup under `.firecrawl/`. None of it is inference. It matters because it establishes the **baseline the three scope items have to improve on** — and because the gap between what the site promises and what it does is, itself, the business case.

3.7.1 The site is a part-configured 2017 theme, never finished

Unedited theme placeholder still live on `jbautocare.com/faq/`:

- Contact block reads: “**Auto Shop, 123 Main Street, Somewhere, USA, 888 999 1234, john@mechanic.com**” — beside the real (604) 815-0085 in the header.
- Every FAQ answer reads: “*This is an example of text written in response to a question. This text can be as brief, or as detailed as you like.*” — eight questions, zero answers.
- Questions are construction-industry defaults never swapped for automotive ones: “*Will I be assigned a project manger?*” (sic), “*Can I use my preferred suppliers?*”

- A testimonial from “**John Doe, Business Owner**” sits directly above the four real customer testimonials.
- Banner claims “**Got an Emergency? Contact us 24/7!**” against posted hours of 8:30am–5:30pm — an unintended and unmeetable promise.

Orphaned theme demo routes still published (from firecrawl map): /uncategorized/hello-world, /uncategorized/blog-post-with-comments, /uncategorized/full-width-blog-post, /uncategorized/left-sidebar-blog-post, /uncategorized/right-sidebar-blog-post.

Copy errors in the real content: “in the Squamish”; “honesty, courtesy and and dignity”; “our facilites”; “that is a sure sign you require and alignment”.

Site footer: © **2019**. Image assets dated 2017. Designed by Actuate Communications Inc.

3.7.2 The sister site is in the same state

distinctauto.ca/about runs on **literal Lorem ipsum** under the headings “A Leading Car Dealer For Over 30 Years” and “Since 1983”. Its stat counters — “Vehicles in Stock”, “Vehicles Sold”, “Years in Business” — render with **no numbers**. /inventory lists three Divi demo vehicles (“2016 Divi Lead SUV”, “2017 Monarch Sedan”, “2013 Nexus Sedan”) sharing **one fake VIN**, KMHSLSUEXDU209485. The footer credits “**©Sea to Sky Energy Solutions 2018**” — a different company entirely.

3.7.3 What this establishes

1. **Nobody is maintaining these sites.** Two abandoned WordPress installs, one with a dead front-door CTA (RES2) and a live booking widget on the wrong pages.
2. **The follow-up-email scope item has no incumbent to displace.** There is no newsletter, no blog since the theme demo posts, no visible CRM. Anything shipped is net-new — which makes it the lowest-risk of the three items to deliver first.
3. **Whatever is built must not need Brad to maintain a website.** The evidence is unambiguous that he will not. Tooling that depends on him editing pages will decay to the same state within a year. This is a design constraint, not a criticism: he is running two businesses and turning a cold email around in four minutes.
4. **The contact form is the only working intake path** on /contact-us/ (fields: Email, First Name, Last Name, Phone, Message) — plus the AutoOps widget on five of six pages.

3.7.4 The honest framing

The shop’s real reputation is in the four testimonials — “*ethical repairs*”, “*8 years*”, “*no costly surprises*”, “*it seems rare to get this kind of service today*”. That reputation is being represented online by a page that says “**123 Main Street, Somewhere, USA**”. The gap between the business

and its digital surface is the opportunity, and it can be stated to Brad without insult because none of it is about how he fixes cars.

3.7.5 Open questions

- **OQ9** — Who, if anyone, currently administers the WordPress sites? Is Actuate Communications still engaged?
- **OQ10** — Where do enquiries land today? Does the /contact-us/ form deliver to brad@distinctauto.ca, and does anyone triage it?
- **OQ11** — Roughly how many repair orders per week does the shop run? No public signal; needed for any capacity or ROI modelling.

3.8 RES6 — [EXT] Distinct Auto Sales: VSA regulation (SECOND DECISIVE CONSTRAINT)

Applies to [EXT] scope only — the dealership half, added by Altumo decision, not by DOC1. See DOC1 scope note.

3.8.1 Conclusion

In British Columbia, only a VSA-registered salesperson may negotiate or conclude a vehicle sale. An AI cannot hold that registration. Every dealership-side communication this system generates is therefore **draft-only, human-sent, and attributed to a registered person** — as a matter of law, not product preference.

This is the inverse of the repair shop's position (RES3), where BC is permissive. On the sales side, BC is strict, and the strictness lands precisely on the scope item Brad accepted: *writing the follow-up emails*.

3.8.2 The regulatory surface

Distinct Auto Sales is a licensed motor dealer under the *Motor Dealer Act* (RSBC 1996, c. 316), regulated by the **Vehicle Sales Authority of BC**. The operative rules are in the **Motor Dealer Act Regulation** (BC Reg. 447/78).

3.8.2.1 MDAR s. 23 — mandatory disclosures on every used vehicle

In any written representation that is a sale or purchase agreement, the dealer must disclose, to the best of their knowledge and belief, whether the vehicle:

#	Disclosure
1	Was used as a taxi (passenger-directed vehicle authorization), police/emergency vehicle, or in organized racing
2	Sustained damage requiring repairs costing more than \$2,000 (<i>estimated repair cost, not amount actually paid</i>)
3	Was used as a lease or rental vehicle
4	Was brought into BC specifically for the purpose of sale
5	Has an odometer that accurately records true distance travelled

Plus, where applicable: **salvage, rebuilt**, and any **out-of-province registration history**, naming the jurisdiction.

3.8.2.2 MDAR s. 27 — display

A used vehicle offered for sale must carry, clearly and legibly, the **offered price**, and where applicable the statement “**Not Suitable for Transportation**” (also required in the contract itself under s. 22).

3.8.2.3 All-in pricing

The advertised or communicated price must be the **total consumer price** — mandatory documentation, administration, preparation, inspection and dealer fees included. Mandatory fees may not be added after a consumer responds. Government charges (tax, licensing, registration, insurance) may be excluded only if clearly identified. Optional products must be plainly marked optional.

Critically: **the same price must be used when responding by telephone, text, email or online messaging**. An AI-drafted follow-up email quoting a figure that omits a mandatory fee is a pricing violation in the same way a newspaper ad would be.

3.8.2.4 Electronic communication creates evidence

An email, text, listing or messaging-app reply is evidence of the price offered, the vehicle’s described condition and history, any salvage/rebuilt/out-of-province representation, which fees were called mandatory or optional, and **the identity of the salesperson making the representation**.

3.8.3 What this forbids, and what it requires

Forbidden — do not build:

- Any auto-send path for dealership customer communication.
- Any AI-generated vehicle price presented to a customer without human review.
- Any AI agent acting as an unregistered intermediary negotiating a sale.
- Any follow-up that restates a vehicle price without re-deriving it from the current all-in figure of record.

Required — must build:

1. **Draft-and-approve, no exceptions.** Every [EXT] message is queued for a named, VSA-registered human who sends it. The system never speaks to a customer directly.
2. **Attribution to a registered salesperson** on every outbound message, captured in the record.
3. **Disclosure completeness check** before any vehicle-specific message can be approved — the s.23 fields must be present and non-null for that vehicle, or the draft is blocked.
4. **Price integrity.** One all-in price per vehicle, single source of truth; drafts interpolate it rather than restating a number a model produced.
5. **Immutable retention** of every advertisement, draft, approved message, and the price and disclosure state at time of sending — reproducible without alteration.

3.8.4 Why this is the strongest card on the call

Brad has been a dealer for decades and knows the VSA rules cold. A vendor who pitches him “AI that emails your leads back automatically” is proposing something he cannot legally switch on — and he will know it within one sentence. Arriving already knowing that the dealership half must be draft-only, and *why*, is the difference between a demo and a conversation with someone who understood the business.

It also happens to make the repair shop and dealership halves share one mechanism: **Brad approves, the system drafts.** RES3 arrives at the same design from a commercial argument; RES6 arrives at it from a statutory one.

3.8.5 Open questions

- **OQ12 [EXT]** — Is Distinct Auto Sales’ VSA dealer licence current, and who besides Brad is VSA-registered as a salesperson? Determines who can be in the approval queue.
- **OQ13 [EXT]** — Where does vehicle inventory live today? The public /inventory page is Divi demo data (RES5), so real stock is tracked somewhere unseen.
- **OQ14 [EXT]** — Does the dealership use a DMS, or is it spreadsheets?

Chapter 4

Personas

Chapter 5

Personas

Five personas, all evidence-grounded. J B Autocare is a small shop, so **one human often wears several of these hats** — Brad in particular is owner, approver and very likely the front counter. The personas are separated by *role in the work*, not by headcount, because the approval role must stay distinct even when the same person performs it.

Code	Persona	Who	In scope for
BRAD	Brad, Owner-Operator	Runs both businesses from one mailbox [RES1]	R-001, R-002, R-003 — the approver on every outbound
ADV	Service Advisor	Front counter; books work, explains quotes	R-001, R-002
TECH	Technician	Certified tech; diagnoses and does the work [RES1]	R-001, R-002
CUST	Customer	Squamish-area vehicle owner [RES4]	R-001, R-002, R-003
SALES	[EXT] Salesperson	VSA-registered dealership salesperson [RES6]	R-003 [EXT]

5.0.1 Why BRAD is a separate persona from ADV

Because the approval step is load-bearing and legally distinct. R-002 requires Brad's approval before a quote reaches a customer for commercial reasons [RES3]; R-003 [EXT] requires a **VSA-registered person** to make any price representation [RES6]. Even if Brad is standing at the counter doing both jobs, the system must record *who approved* separately from *who drafted*, because that record is the defence if a quote is ever disputed.

5.0.2 Story codes

Prefix	Persona
US-BRAD-###	Owner-Operator
US-ADV-###	Service Advisor
US-TECH-###	Technician
US-CUST-###	Customer
US-SALES-###	[EXT] Salesperson

5.1 BRAD — Owner-Operator

5.1.1 Who he is

Brad runs **two businesses in Squamish, BC** from a single mailbox: J B Autocare, a full-service repair shop specialising in European makes, and Distinct Auto Sales, a used-car dealership [RES1]. Both list brad@distinctauto.ca. The Volvo Club of BC's shop directory names him personally as the contact for JB Autocare [RES1].

5.1.2 What the evidence says about how he works

He is fast and decisive. He replied to a cold email in **four minutes**, with one word [F-DOC1-001, F-DOC1-002]. Any tool that demands sustained attention is mismatched to him.

He does not maintain software. Two WordPress sites sit unfinished — one still telling customers the shop is at “123 Main Street, Somewhere, USA”, the other running Lorem ipsum under its About heading [RES5]. This is not a criticism; it is the single most important design fact in this spec. **Anything that requires Brad to keep a system tidy will decay.**

His reputation is his product. The four testimonials on his own site say “*ethical repairs*”, “*honest*”, “*no costly surprises*”, and one customer counts **eight years** of repeat business [RES1]. He has something most shops do not, and it was earned at the counter, not online.

He bought scheduling software and half-installed it. AutoOps is provisioned and live — but missing from the homepage, which is the only page that advertises booking, via a button that links to itself [RES2]. This is what “busy owner, no time” looks like in markup.

5.1.3 What he needs from this system

1. **To approve, not to operate.** Every customer-facing message stops at him. That is the requirement, and it is also the only role he has time for.
2. **A queue that is obviously finite.** Something he can clear between jobs, not a dashboard he must inhabit.

3. **To never be embarrassed by it.** He has one reputation across both businesses and a town of 23,819 people [RES4]. A quote that goes out wrong costs him more than the job.
4. **It must work when he ignores it for a week.** Because he will.

5.1.4 Anti-requirements

- Do not build him a settings page he has to curate.
- Do not require him to write content.
- Do not send anything on his behalf without him seeing it [RES3, RES6].

5.2 CUST — Customer

5.2.1 Who they are

A vehicle owner in Squamish or the wider Sea to Sky corridor [RES4].

Squamish is **23,819 people, growing 22.2% in five years** — among the fastest-growing municipalities in BC — with a median age of **37.6** and about **9,191 households** [RES4]. That growth matters: the town continuously produces people who own a car and have no mechanic yet.

About 36% of local commuters work outside Squamish — roughly 8% in Whistler, 5% in Vancouver [RES4]. Against shop hours of 8:30–5:30, a third of the market cannot drop a car off during the working day. This is a first-class constraint on R-001, not an edge case.

5.2.2 Composition (binding on sample data)

Roughly **85% not a visible minority, ~15% racialized** (largest groups South Asian, Chinese, Filipino, Southeast Asian), and a distinct **~8–9% Indigenous** population — Squamish sits on Skwxwú7mesh Úxwumixw (Squamish Nation) territory, and Indigenous identity is a separate census concept that must not be folded into the visible-minority figure [RES4]. Mother tongue is ~80% English, with German, Punjabi, Mandarin, Spanish, Cantonese, Tagalog and Portuguese each present in small numbers.

The shop's own published testimonials — Ian B McIlwaine, Barry Sherman, Deena Cox Zenyk, Chris Ford [RES1] — corroborate the Anglo-majority pattern.

Sample data must reflect this mix. Not a single community, and not an absence of one. Brad knows exactly who walks through his door; sample customers that misrepresent his practice back to him is the fastest way to lose the room.

5.2.3 What they drive

European core — Audi, BMW, VW, Porsche, Volvo — because that is the stated specialism [RES1], plus the pickups, Subarus and AWD wagons a mountain corridor actually runs. One testimonial references “my truck” [RES1]. Winter tire changeover is a fact of life on Highway 99.

5.2.4 What they want

1. To find out what it will cost **before** committing — the shop already promises “a free cost estimate” [RES1].
2. To book without a phone call during business hours they may be commuting through.
3. **No surprises.** This is what the shop is already known for, and it is what the photo quoting feature must not break [RES1, RES3].

5.3 SALES — [EXT] Salesperson

[EXT] — dealership scope, added by Altumo decision, not by Brad’s reply. See DOC1.

5.3.1 Who they are

A **VSA-registered salesperson** at Distinct Auto Sales. Registration is not a formality: in British Columbia only a registered salesperson may negotiate or conclude a vehicle sale, and **an AI cannot hold that registration** [RES6].

That single fact defines this persona’s entire relationship to the system: **the system drafts; this human sends.** There is no configuration in which it is otherwise.

5.3.2 What the law requires of them

Every electronic message about a vehicle is evidence of the price offered, the vehicle’s described condition and history, any salvage/rebuilt/out-of-province representation, which fees were mandatory versus optional, and **the identity of the salesperson making the representation** [RES6].

Before any vehicle-specific message goes out, the MDAR s.23 disclosures must be complete — prior taxi/police/racing use, damage requiring repairs over **\$2,000**, lease or rental use, brought into BC for sale, and odometer accuracy. Any price stated must be the **all-in total**, identical to the advertised figure [RES6].

5.3.3 What they need

1. **A draft they can send in one action** — with their name and registration attached automatically.
2. **To be blocked, not warned**, when a vehicle’s s.23 disclosures are incomplete. A warning is something you click past at 5pm.
3. **One price of record per vehicle**, interpolated into drafts rather than restated by a model — so a follow-up email can never quote a figure that differs from the listing.
4. **A retained, reproducible copy** of everything sent, with the price and disclosure state as it was at that moment.

5.3.4 Open questions

- **OQ12** — Who besides Brad is VSA-registered? That list is the approval queue.

5.4 ADV — Service Advisor

5.4.1 Who they are

The front counter at J B Autocare — books work, takes the calls, explains quotes, hands back keys. At a shop this size **this is frequently Brad himself** [RES1]; the persona exists separately because the *work* is distinct from the *approval*, and the system must record them separately even when one person does both.

5.4.2 What the evidence establishes

- The shop advertises a broad service menu — computer diagnostic, brakes, oil, exhaust, tires, alignments, battery, engine & transmission, heat/AC, scheduled maintenance, lighting, and a **100 Point Complete / Pre-purchase inspection** [RES1].
- Intake today runs through a phone number, a contact form (Email, First Name, Last Name, Phone, Message), and the AutoOps widget on five of six pages [RES2, RES5].
- The shop promises “**a free cost estimate**” on every page [RES1] — so the advisor is already fielding estimate requests; R-002 automates a promise, it does not create one.

5.4.3 What they need

1. **One place where an enquiry lands**, whether it arrived by phone, form, or booking widget.
2. **A quote draft that is already most of the way there**, so the job is reviewing rather than composing [R-002].
3. **To see the day's committed work against actual bay capacity** before promising anything [OPP-019].
4. To reach a customer with a revised number and a photo when a job grows, and capture the answer [OPP-021].

5.5 TECH — Technician

5.5.1 Who they are

A certified technician. The shop describes “certified technicians” using “the most up-to-date tools, equipment and information resources available”, specialising in European makes — Audi, Porsche, BMW — while servicing all makes [RES1].

5.5.2 What they need

1. **To see what the customer's photos actually showed** before the car is on the hoist, so the diagnosis starts from evidence rather than a re-description [R-002].
2. **To record what was found**, including the things the customer did not ask about — which is where declined-work recovery starts [OPP-007].
3. **To photograph a discovered problem and have that reach the customer** with a revised number, without leaving the bay [OPP-021].
4. Odometer captured at every visit, because the shop already advertises mileage-based scheduled maintenance but has no way to act on it [OPP-010].

5.5.3 Anti-requirement

Do not put the technician in the approval path. Approval is Brad's, for commercial reasons on the repair side [RES3] and statutory ones on the dealership side [RES6].

5.6 Story map

One release. Personas across the top, the customer's journey down the side [Iron Rule 1].

Journey stage	CUST	ADV	TECH	BRAD	[EXT] SALES
Notices a problem	US-CUST-001 send photos	—	—	—	—
Gets a price	US-CUST-001	US-ADV-001 one inbox	—	US-BRAD-002 approve quote	US-SALES-003 one price
Books	US-CUST-002 fits a commute	US-ADV-002 capacityUS-ADV-003 out-of-hours	—	—	—
Car is in the shop	—	—	US-TECH-001 sees photos	—	—
Job grows	US-CUST-003 sees evidence	—	US-TECH-002 photographs it	US-BRAD-001 clears queue	—
Something is declined	—	—	US-TECH-003 records it	—	—

Journey stage	CUST	ADV	TECH	BRAD	[EXT] SALES
Car leaves	—	—	—	US-BRAD-003 who approved	—
Stays a customer	—	—	—	US-BRAD-001	—
[EXT] Buys a car	—	—	—	—	US-SALES-001 blockedUS-SALES-002 registration

15 stories. Every story cites at least one request or opportunity; every request is covered by at least one story.

5.6.1 The seam worth noticing

The “**Job grows**” row is where three personas meet on a single interaction — the technician photographs, Brad approves, the customer decides. It is also the row with the most reputational weight, because it is the conversation that produces either “*no costly surprises*” or a lost customer [RES1].

5.7 User stories

5.8 US-BRAD-001 — clear the approval queue between jobs

Traces to: R-002, R-003

5.8.1 Story

As Brad, I want a short, finite list of everything waiting on me, so I can clear it in the gaps between jobs rather than sitting at a screen.

5.8.2 Acceptance criteria

- ☐ The queue shows a count and nothing else competes with it for attention
- ☐ Every item can be approved or edited from the list without a detour
- ☐ An empty queue says so plainly and offers nothing else to do
- ☐ The queue does not grow items on its own that require grooming

5.8.3 Why this is here

Brad replied to a cold email in four minutes [F-DOC1-002] and has two half-configured websites [RES5]. Anything that demands sustained attention will not be used.

5.9 US-BRAD-002 — approve a photo quote before it reaches a customer

Traces to: R-002

5.9.1 Story

As Brad, I want every photo-derived quote to stop with me, so nothing goes out in my name that I have not read.

5.9.2 Acceptance criteria

- ☐ No send path exists that bypasses approval
- ☐ The photos, the range and the message are shown together on one screen
- ☐ Editing the range or the wording is possible without leaving the screen
- ☐ The approval records who approved and when

5.9.3 Why this is here

BC has no statutory 10% estimate cap [RES3]; the protection is contractual and evidentiary, so the record is the protection.

5.10 US-BRAD-003 — see who approved each sent message

Traces to: R-003

5.10.1 Story

As Brad, I want drafted-by and approved-by recorded separately, so any dispute about a price can be answered from the record.

5.10.2 Acceptance criteria

- ☐ Every sent message shows both fields
- ☐ Sent messages are immutable
- ☐ The price and disclosure state at time of send are retained

5.10.3 Why this is here

Required commercially on the repair side [RES3] and statutorily on the dealership side, where a VSA registration attaches [RES6].

5.11 US-CUST-001 — send photos and get an estimate without an account

Traces to: R-002

5.11.1 Story

As a customer, I want to photograph the problem and get a price range back, without creating an account or phoning during work hours.

5.11.2 Acceptance criteria

- ☐ The intake page is public
- ☐ Photos, description, vehicle and mileage can be submitted in one form
- ☐ The reply is a range with the reason it is a range
- ☐ The reply states plainly that it is preliminary pending inspection

5.11.3 Why this is here

The shop already promises a free cost estimate site-wide [RES1]; requiring an account would suppress the intake this exists to increase.

5.12 US-CUST-002 — book a time that fits a commute

Traces to: R-001

5.12.1 Story

As a customer who works out of town, I want to book an early drop-off or an evening pickup, so I do not have to take a day off.

5.12.2 Acceptance criteria

- ☐ Out-of-hours options are visible without asking
- ☐ Available slots reflect real shop capacity
- ☐ Booking requires no account

5.12.3 Why this is here

36% of local commuters work outside Squamish [RES4].

5.13 US-CUST-003 — see the evidence when a job grows

Traces to: OPP-021

5.13.1 Story

As a customer, I want to see a photo of what was found alongside the revised price, so I can decide rather than take it on trust.

5.13.2 Acceptance criteria

- ☐ The photo and the revised range arrive together
- ☐ The original estimate is restated for comparison
- ☐ Declining is offered as plainly as accepting

5.13.3 Why this is here

The shop's own testimonials say 'no costly surprises' and 'honest' [RES1].

5.14 US-SALES-001 — be blocked from sending when disclosures are incomplete [EXT]

Traces to: R-003, OPP-018

5.14.1 Story

As a registered salesperson, I want the system to refuse to send a vehicle message while MDAR s.23 disclosures are incomplete.

5.14.2 Acceptance criteria

- ☐ Publish and send are disabled, not merely warned
- ☐ The specific missing disclosure is named
- ☐ The block clears only when the field is answered

5.14.3 Why this is here

A warning is something you click past at 5pm; the s.23 disclosures are mandatory [RES6].

5.15 US-SALES-002 — have my registration attach to what I send [EXT]

Traces to: R-003

5.15.1 Story

As a registered salesperson, I want my name and VSA registration attached automatically to every message I approve.

5.15.2 Acceptance criteria

- ☐ Name and registration render in the message
- ☐ The approving user's registration is recorded against the send
- ☐ An unregistered user cannot approve a vehicle message

5.15.3 Why this is here

Only a VSA-registered salesperson may negotiate or conclude a vehicle sale; an AI cannot hold that registration [RES6].

5.16 US-SALES-003 — quote one price of record [EXT]

Traces to: R-003, OPP-018

5.16.1 Story

As a registered salesperson, I want drafts to interpolate the vehicle's all-in price rather than restate a generated number.

5.16.2 Acceptance criteria

- ☐ The price in a draft is read from the vehicle record
- ☐ A draft cannot contain a price that differs from the listing
- ☐ The all-in price includes mandatory fees

5.16.3 Why this is here

BC requires the same price by phone, text and email, and it must be the all-in total [RES6].

5.17 US-ADV-001 — see one place where every enquiry lands

Traces to: R-001

5.17.1 Story

As the service advisor, I want phone, form and widget enquiries in one list, so nothing is lost between three channels.

5.17.2 Acceptance criteria

- ☐ Enquiries from all intake paths appear in one place
- ☐ Each carries its origin
- ☐ An enquiry can become a booking without re-keying the customer

5.17.3 Why this is here

Intake today runs through a phone number, a contact form and the AutoOps widget on five of six pages [RES2, RES5].

5.18 US-ADV-002 — see committed work against actual bay capacity

Traces to: R-001, OPP-019

5.18.1 Story

As the service advisor, I want to see what the shop has already promised before I promise more.

5.18.2 Acceptance criteria

- ☐ A day shows committed hours against available hours
- ☐ A day near capacity is visibly distinct
- ☐ Booking into a full day requires deliberate confirmation

5.18.3 Why this is here

Online booking without a capacity view converts an overbooked day into a customer-facing failure [OPP-019].

5.19 US-ADV-003 — offer early key drop and after-hours pickup as normal options

Traces to: R-001

5.19.1 Story

As the service advisor, I want out-of-hours drop-off and pickup to be first-class booking choices, so commuters are not turned away.

5.19.2 Acceptance criteria

- ☐ Early key drop and after-hours pickup appear alongside ordinary slots
- ☐ A customer's stored availability constraint is visible when booking them
- ☐ These options are not buried behind a note or a phone call

5.19.3 Why this is here

About 36% of Squamish commuters work outside town against shop hours of 8:30-5:30 [RES4].

5.20 US-TECH-001 — see the customer's photos before the car is on the hoist

Traces to: R-002

5.20.1 Story

As a technician, I want the photos the customer sent attached to the job, so I start from evidence rather than a re-description.

5.20.2 Acceptance criteria

- ☐ Photos are on the job screen
- ☐ Photos remain attached to the vehicle after the job closes
- ☐ The customer's own description is shown verbatim

5.20.3 Why this is here

Photos attach to the vehicle, not only the job, so a previously declined item still has its evidence when it recurs [OPP-007].

5.21 US-TECH-002 — photograph found work and have it reach the customer

Traces to: OPP-021

5.21.1 Story

As a technician, I want to photograph what I have found and have the revised number sent with it, without leaving the bay.

5.21.2 Acceptance criteria

- ☐ A photo can be captured and attached from a phone
- ☐ The revised range is generated against the original estimate
- ☐ The message drafts automatically and waits for approval
- ☐ The customer's answer is recorded against the job

5.21.3 Why this is here

The moment a shop's reputation is made or lost is the call saying the job grew [OPP-021].

5.22 US-TECH-003 — record work that was recommended and declined

Traces to: OPP-007

5.22.1 Story

As a technician, I want declines recorded with a reason, so the recommendation is not lost.

5.22.2 Acceptance criteria

- ☐ A decline captures item, date and reason
- ☐ Declines surface at the customer's next visit
- ☐ Declines are available to the follow-up drafts

5.22.3 Why this is here

Declined work is the largest pool of pre-qualified revenue a shop has [OPP-007].

Chapter 6

Screens

6.1 Screen inventory

Planned before any screen spec is written. Every screen traces to a request (R-###), a proposed opportunity (OPP-###), or is an engineering derivation required for another screen to function.

Legend: R = Brad's ask · OPP = Altumo proposal · DERIV = engineering derivation · [EXT] = dealership

ID	Screen	Persona	Traces to	Kind
SCR-001	Sign in	all	DERIV (per-user approval record)	DERIV
SCR-002	Today	BRAD, ADV	R-001	R
SCR-003	Approval queue	BRAD	R-002, R-003	R
SCR-004	Quote review	BRAD, ADV	R-002	R
SCR-005	Photo intake (customer)	CUST	R-002	R
SCR-006	Booking (customer)	CUST	R-001	R
SCR-007	Schedule board	ADV, BRAD	R-001, OPP-019	R
SCR-008	Customer record	ADV, BRAD	OPP-005	OPP
SCR-009	Vehicle record	ADV, TECH	OPP-005, OPP-010	OPP
SCR-010	Job / work order	TECH, ADV	R-002, OPP-021	R
SCR-011	Found-work approval	TECH, CUST	OPP-021	OPP
SCR-012	Declined work	ADV, BRAD	OPP-007	OPP
SCR-013	Follow-up drafts	BRAD	R-003	R
SCR-014	Message record	BRAD	R-003, OPP-020	R
SCR-015	Reminders due	ADV	OPP-010	OPP
SCR-016	Seasonal campaign	BRAD, ADV	OPP-008	OPP
SCR-017	Tire storage	ADV, TECH	OPP-009	OPP
SCR-018	Review requests	BRAD	OPP-014	OPP
SCR-019	[EXT] Inventory	SALES	OPP-018	OPP

ID	Screen	Persona	Traces to	Kind
SCR-020	[EXT] Vehicle disclosures	SALES	OPP-018	OPP
SCR-021	[EXT] Trade-in appraisal	SALES	OPP-016	OPP
SCR-022	[EXT] Sales follow-up drafts	SALES	R-003 [EXT]	R
SCR-023	Fleet accounts	ADV	OPP-015	OPP
SCR-024	Training & docs	all	PKG	PKG

24 screens. 10 trace to Brad’s three requests, 11 to proposed opportunities, 1 to the packaging, 1 is a derivation, and 2 are [EXT] requests.

6.1.1 Note on SCR-001

A sign-in screen is an engineering derivation under the necessity rule: R-002 and R-003 both require recording **who approved** a message separately from who drafted it — for commercial reasons on the repair side [RES3] and statutory ones on the dealership side, where the approver’s VSA registration must be attached [RES6]. An approval record without an identity is not a record. It is therefore mechanically required, not a “best practice” addition.

6.1.2 Note on the OPP screens

Eleven screens exist because Altumo proposed the underlying idea, not because Brad asked. They are marked OPP here, carry the marking in their own specs, and are visually distinct in the prototype. If Brad wants only what he asked for, those eleven come out and the remaining thirteen still form a complete system.

6.2 Navigation

One global navigation model. One release, one nav [Iron Rule 1].

6.2.1 Structure

J B AUTOCARE			
— Today	SCR-002	← default landing for BRAD and ADV	
— Approvals (n)	SCR-003	← badge count; the queue Brad clears	
— Quote review	SCR-004		
— Follow-up drafts	SCR-013		
— Review requests	SCR-018	OPP	
— Schedule	SCR-007		
— Booking (public)	SCR-006		
— Jobs	SCR-010		
— Found work	SCR-011	OPP	

	└ Declined work	SCR-012	OPP
	└ Customers	SCR-008	OPP
	└ └ Vehicle record	SCR-009	OPP
	└ └ Reminders due	SCR-015	OPP
	└ └ Tire storage	SCR-017	OPP
	└ └ Fleet accounts	SCR-023	OPP
	└ Campaigns	SCR-016	OPP
	└ Dealership [EXT]		
	└ └ Inventory	SCR-019	OPP
	└ └ Disclosures	SCR-020	OPP
	└ └ Trade-in appraisal	SCR-021	OPP
	└ └ Sales follow-up	SCR-022	
	└ Training & docs	SCR-024	PKG

Public / unauthenticated

	└ Sign in	SCR-001
	└ Photo intake	SCR-005
	└ Booking	SCR-006

6.2.2 Rules

1. **Approvals carries a live count.** It is the one number Brad needs, and the persona research says he works in gaps between jobs [BRAD persona]. Everything else can wait; the queue cannot, because a customer is waiting on the other end of it.
2. **Today is the default landing** for staff. Not a dashboard to inhabit — a finite list of what is happening today and what needs an answer.
3. **Three screens are public:** sign-in, photo intake, and booking. A customer must never need an account to send photos or book. Requiring one would suppress exactly the intake R-001 and R-002 exist to increase.
4. **[EXT] is one collapsed branch.** If the dealership drops out of scope, the branch disappears and nothing else in the nav changes.
5. **OPP items are marked in the prototype nav** so Brad can see at a glance which parts of the system he asked for and which Altumo is proposing.

6.2.3 Sitemap constraint

Every screen is reachable from the nav in at most two clicks from Today. Any screen needing three is in the wrong branch.

6.3 SCR-001 — Sign in

Persona	all
Origin	Engineering derivation
Traces to	derivation
Prototype	prototype/login.html

6.3.1 Purpose

Authenticates a staff user so that approvals carry an identity. Also carries the download of this specification.

6.3.2 Elements

- Email and password fields
- Sign-in action
- Link to the spec PDF
- Link to the screen directory

6.3.3 Why it is specified this way

Not a 'best practice' addition. R-002 and R-003 both require recording who approved a message separately from who drafted it, commercially [RES3] and statutorily [RES6]. An approval without an identity is not a record.

6.4 SCR-002 — Today

Persona	BRAD, ADV
Origin	Requested
Traces to	R-001
Prototype	prototype/today.html

6.4.1 Purpose

The default landing screen. A finite view of what needs an answer and what is in the shop.

6.4.2 Elements

- Waiting-on-you queue with count
- In-the-shop-today bay table
- Arriving-tomorrow list
- Notice that nothing has been sent

6.4.3 Why it is specified this way

Brad works in gaps between jobs [BRAD persona]. This is a queue, not a dashboard.

6.5 SCR-003 — Approval queue

Persona	BRAD
Origin	Requested
Traces to	R-002, R-003
Prototype	prototype/approvals.html

6.5.1 Purpose

Everything the system has drafted, grouped by kind, waiting for approval.

6.5.2 Elements

- Photo quotes group
- Follow-up drafts group
- Found work group
- Review requests group, marked proposed

6.5.3 Why it is specified this way

The mechanism R-002 and R-003 share. The count is the only number Brad needs.

6.6 SCR-004 — Quote review

Persona	BRAD, ADV
Origin	Requested
Traces to	R-002
Prototype	prototype/quote-review.html

6.6.1 Purpose

A photo-derived quote presented for approval, with the photos, the range, the reason the range is wide, and the message.

6.6.2 Elements

- Customer photos
- Range with low and high
- Line items showing low and high
- Why-the-range-is-wide note
- Draft message
- Approve or edit bar

6.6.3 Why it is specified this way

The range is structural, not stylistic. There is no schema field for a single amount [data model](#).

6.7 SCR-005 — Photo intake

Persona	CUST
Origin	Requested
Traces to	R-002
Prototype	prototype/photo-intake.html

6.7.1 Purpose

Public. A customer submits photos, a description, vehicle and mileage, and their availability.

6.7.2 Elements

- No account required
- Photo upload
- Description field
- Vehicle and mileage
- Availability selector including key drop
- Explanation of what happens next

6.7.3 Why it is specified this way

Public because requiring an account suppresses the intake this exists to increase [NFR-6].

6.8 SCR-006 — Booking

Persona	CUST
Origin	Requested

Traces to	R-001
Prototype	prototype/booking.html

6.8.1 Purpose

Public. Service selection from the shop's own nine categories, then a slot.

6.8.2 Elements

- Service categories as published by the shop
- Slot grid
- Early key drop row
- After-hours pickup row
- No account required

6.8.3 Why it is specified this way

Categories are the shop's own, taken from its site [RES1]. Out-of-hours options are first-class because 36% of commuters work out of town [RES4].

6.9 SCR-007 — Schedule board

Persona	ADV, BRAD
Origin	Requested
Traces to	R-001, OPP-019
Prototype	prototype/schedule.html

6.9.1 Purpose

Bay-by-day view of committed work, with a capacity panel.

6.9.2 Elements

- Bay rows by day
- Capacity table showing committed against available
- Near-capacity days visibly distinct

6.9.3 Why it is specified this way

The capacity panel is OPP-019 and is marked proposed. It is the safety valve that makes taking online bookings safe.

6.10 SCR-008 – Customer record

Persona	ADV, BRAD
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-005 prototype/customer.html

6.10.1 Purpose

One customer, across both businesses: contact, vehicles, and full history including the purchase.

6.10.2 Elements

- Contact and availability
- Vehicles owned
- History including sale, service, declines and storage
- Note that purchase and service are one record

6.10.3 Why it is specified this way

The highest-value idea in the spec. Requires noticing that two websites are one operator [RES1].

6.11 SCR-009 – Vehicle record

Persona	ADV, TECH
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-005, OPP-010 prototype/vehicle.html

6.11.1 Purpose

A vehicle with its owner, identifiers, odometer, next-due intervals and photo history.

6.11.2 Elements

- Owner link
- VIN, plate, odometer
- Next-due panel
- Photos attached to the vehicle, not only jobs

6.11.3 Why it is specified this way

Photos stay with the vehicle so a declined item still has its evidence when it recurs.

6.12 SCR-010 — Work order

Persona	TECH, ADV
Origin	Requested
Traces to	R-002
Prototype	prototype/job.html

6.12.1 Purpose

The job: what was booked, what was found, and line items with low and high.

6.12.2 Elements

- Job header
- Found-on-inspection panel
- Line items with low/high and status
- Link to found-work approval

6.12.3 Why it is specified this way

Keeps the estimate and the work one record, so the trail from quote to invoice is unbroken [OPP-020].

6.13 SCR-011 — Found-work approval

Persona	TECH, CUST
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to	OPP-021
Prototype	prototype/found-work.html

6.13.1 Purpose

A discovered problem, photographed from the bay, with a revised range and a draft to the customer.

6.13.2 Elements

- Photos of the finding
- Original estimate, additional, revised total
- Draft message
- Approve or edit bar

6.13.3 Why it is specified this way

BC has no statutory 10% cap [RES3], so the record is the protection for both parties.

6.14 SCR-012 — Declined work

Persona	ADV, BRAD
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to	OPP-007
Prototype	prototype/declined-work.html

6.14.1 Purpose

Recommended-but-not-done work, with reason and a draft action.

6.14.2 Elements

- Customer, vehicle, item, date, reason
- Draft action per row
- Note on why this is the cheapest revenue available

6.14.3 Why it is specified this way

AutoOps' own product material treats surfacing declined work as core [RES2].

6.15 SCR-013 — Follow-up drafts

Persona	BRAD
Origin	Requested
Traces to	R-003
Prototype	prototype/follow-up-drafts.html

6.15.1 Purpose

Post-visit follow-up messages drafted from the work order, awaiting approval.

6.15.2 Elements

- Draft message per customer
- Approve or edit bar per draft
- Details drawn from the customer record, not a template

6.15.3 Why it is specified this way

No incumbent to displace [RES5], so this is net-new and the lowest-risk of the three requests.

6.16 SCR-014 — Message record

Persona	BRAD
Origin	Requested
Traces to	R-003, OPP-020
Prototype	prototype/message-record.html

6.16.1 Purpose

Everything sent, retained as sent, with drafted-by and approved-by as separate columns.

6.16.2 Elements

- Date, recipient, subject
- Drafted by
- Approved by
- Immutability note

6.16.3 Why it is specified this way

Two columns, not one: the repair side needs the dispute record [RES3], the dealership side needs the registration attached [RES6].

6.17 SCR-015 — Reminders due

Persona

ADV

Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-010 prototype/reminders.html

6.17.1 Purpose

Customers whose mileage-based interval has arrived.

6.17.2 Elements

- Customer, vehicle, what is due, last seen
- Draft action
- Note that it is built from odometer captured at each visit

6.17.3 Why it is specified this way

The shop already advertises mileage-based scheduled maintenance with no way to act on it [RES1].

6.18 SCR-016 — Winter changeover

Persona	BRAD, ADV
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-008 prototype/campaign.html

6.18.1 Purpose

A seasonal campaign for the corridor's winter tire window.

6.18.2 Elements

- Counts: eligible, in storage, booked, drafts ready
- A representative draft
- Batch approval

6.18.3 Why it is specified this way

Highway 99 has seasonal winter tire requirements; demand is predictable and arrives at once [RES4].

6.19 SCR-017 – Tire storage

Persona	ADV, TECH
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-009 prototype/tire-storage.html

6.19.1 Purpose

Stored tire sets by rack, with condition recorded at storage.

6.19.2 Elements

- Rack, customer, vehicle, set, in-since, condition
- Note that retention, not the fee, is the point

6.19.3 Why it is specified this way

A customer whose tires are in your building returns twice a year without being sold anything.

6.20 SCR-018 – Review requests

Persona	BRAD
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-014 prototype/review-requests.html

6.20.1 Purpose

A drafted review request for a customer likely to say yes.

6.20.2 Elements

- Customer context: tenure, last job, whether asked before
- Draft message
- Approve or edit bar

6.20.3 Why it is specified this way

Four testimonials on a site last touched in 2019 [RES1, RES5]. The satisfaction exists; the asking does not.

6.21 SCR-019 – Inventory

Persona	SALES
Origin	[EXT] Dealership — scope extension
Traces to	OPP-018
Prototype	prototype/inventory.html

6.21.1 Purpose

[EXT] Vehicles on the lot with all-in price, disclosure state and reconditioning status.

6.21.2 Elements

- Vehicle, odometer, all-in price
- Disclosure completeness badge
- Reconditioning status linked to the shop

6.21.3 Why it is specified this way

One all-in price of record, because BC requires the same figure across advertising, phone, text and email [RES6].

6.22 SCR-020 – Vehicle disclosures

Persona	SALES
Origin	[EXT] Dealership — scope extension
Traces to	OPP-018
Prototype	prototype/disclosures.html

6.22.1 Purpose

[EXT] The MDAR s.23 fields for one vehicle, blocking publish and send while incomplete.

6.22.2 Elements

- Seven disclosure rows
- Publish and send disabled while incomplete
- Note that the threshold is estimated repair cost

6.22.3 Why it is specified this way

Blocked, not warned. A warning is something you click past at 5pm [RES6].

6.23 SCR-021 — Trade-in appraisal

Persona	SALES
Origin	[EXT] Dealership — scope extension
Traces to	OPP-016
Prototype	prototype/trade-in.html

6.23.1 Purpose

[EXT] Photo-based appraisal of a trade-in, capturing disclosures at appraisal time.

6.23.2 Elements

- Photos including odometer and damage
- Appraisal range
- Disclosure capture
- Approve or edit bar

6.23.3 Why it is specified this way

Reuses R-002's accepted capability, and front-loads disclosures the VSA requires anyway [RES6].

6.24 SCR-022 — Sales follow-up

Persona	SALES
Origin	[EXT] Dealership — scope extension
Traces to	R-003

Prototype `prototype/sales-follow-up.html`

6.24.1 Purpose

[EXT] A drafted message to a sales prospect, sent by a registered salesperson.

6.24.2 Elements

- Draft with all-in price interpolated
- Trade allowance as a range
- Registration line
- Approve-and-send as a named person

6.24.3 Why it is specified this way

The system cannot send this. Only a VSA-registered salesperson may make the representation [RES6].

6.25 SCR-023 — Fleet accounts

Persona	ADV
Origin	Proposed — Altumo's idea, not something Brad asked for
Traces to Prototype	OPP-015 <code>prototype/fleet.html</code>

6.25.1 Purpose

Commercial accounts with several vehicles, consolidated.

6.25.2 Elements

- Account, vehicle count, next due, billing mode

6.25.3 Why it is specified this way

Fills weekday daytime capacity that commuting retail customers cannot use [RES4].

6.26 SCR-024 – Training & docs

Persona	all
Origin	Packaging
Traces to	PKG
Prototype	prototype/training.html

6.26.1 Purpose

In-app access to the training program and documentation.

6.26.2 Elements

- Four training tracks
- What else the packaging delivers
- Note that a tour is not training

6.26.3 Why it is specified this way

Training is the most important element of the delivery [PKG].

Chapter 7

Data model and architecture

7.1 Data model

One customer, one vehicle, one record — across both businesses [OPP-005].

erDiagram

```
CUSTOMER ||--o{ VEHICLE : owns
CUSTOMER ||--o{ MESSAGE : receives
VEHICLE ||--o{ JOB : "serviced in"
VEHICLE ||--o{ PHOTO : "photographed for"
VEHICLE ||--o{ LISTING : "listed as (EXT)"
VEHICLE ||--o{ TIRE_SET : "stored (OPP)"
JOB ||--o{ LINE_ITEM : contains
JOB ||--o{ QUOTE : "estimated by"
JOB ||--o{ DECLINE : "recorded (OPP)"
QUOTE ||--o{ PHOTO : "derived from"
QUOTE ||--|| APPROVAL : "requires"
MESSAGE ||--|| APPROVAL : "requires"
LISTING ||--|| DISCLOSURE : "requires (EXT)"
APPROVAL }o--|| USER : "given by"
BOOKING }o--|| VEHICLE : for
BOOKING }o--|| SERVICE_TYPE : of
```

Entity	Traces to	Note
CUSTOMER	OPP-005	Shared by both businesses. The point of the whole model.
VEHICLE	R-001, R-002, OPP-005	Keyed on VIN. Bridges sale and service.

Entity	Traces to	Note
BOOKING	R-001	Service type drawn from the shop's own nine categories
SERVICE_TYPE	R-001	Seeded from the shop's published menu
JOB	R-002	The work order
LINE_ITEM	R-002	Carries low/high, never a single figure
QUOTE	R-002	amount_low and amount_high. There is no amount.
PHOTO	R-002	Attached to the vehicle, not only the job
DECLINE	OPP-007	Recommended-but-not-done, with reason
MESSAGE	R-003	Every outbound; immutable once sent
APPROVAL	R-002, R-003	drafted_by and approved_by are distinct
USER	derivation	Carries vsa_registration for [EXT]
TIRE_SET	OPP-009	Rack location, condition at storage
LISTING [EXT]	OPP-018	One all_in_price of record
DISCLOSURE [EXT]	OPP-018	The five MDAR s.23 fields; blocks publish when incomplete

7.1.1 Two constraints that are structural, not configurable

1. QUOTE has no single amount field. It has amount_low and amount_high. A schema that permits a single figure permits a UI that shows one, and BC offers no statutory safe harbour if that figure misleads [RES3]. The constraint lives in the schema so it cannot be undone by a later UI change.

2. APPROVAL separates drafted_by from approved_by. On the repair side that record answers a pricing dispute in a province with no estimate cap [RES3]. On the dealership side it attaches a VSA registration to a price representation, which the law requires [RES6]. One column would satisfy neither.

7.2 APPROVAL

Traces to: R-002, R-003

Field	Type	Note
id	uuid	pk
subject_type	enum	quote
subject_id	uuid	
drafted_by	text	system
approved_by	uuid	fk users — required
approved_at	timestamp	required
vsa_registration	text	captured for [EXT] sends

7.2.1 Note

drafted_by and approved_by are separate columns. One column would satisfy neither the repair-side dispute record [RES3] nor the dealership-side registration requirement [RES6].

7.3 CUSTOMER

Traces to: OPP-005

Field	Type	Note
id	uuid	pk
name	text	required
phone	text	
email	text	
availability_note	text	e.g. commutes to Whistler
first_seen	date	
source_business	enum	shop

7.3.1 Note

Shared by both businesses. This is the entity that makes OPP-005 possible: today the dealership does not know its customer is in the service bay.

7.4 DECLINE

Traces to: OPP-007

Field	Type	Note
id	uuid	pk
job_id	uuid	fk
vehicle_id	uuid	fk
item	text	
reason	text	
declined_on	date	
resurfaced_count	int	

7.4.1 Note

Recommended-but-not-done. Without this entity the largest pool of pre-qualified revenue a shop has is invisible.

7.5 DISCLOSURE

Traces to: OPP-018

Field	Type	Note
id	uuid	pk
vehicle_id	uuid	fk
used_as_taxi_police_racing	bool null	
damage_over_2000	bool null	estimated repair cost, not amount paid
lease_or_rental	bool null	
brought_into_bc_for_sale	bool null	
odometer_accurate	bool null	
salvage_rebuilt	enum null	
prior_jurisdiction	text null	

7.5.1 Note

[EXT] The five MDAR s.23 fields plus salvage/rebuilt and prior jurisdiction. **Null blocks publish and send** — blocked, not warned [RES6].

7.6 LISTING

Traces to: OPP-018

Field	Type	Note
id	uuid	pk
vehicle_id	uuid	fk
all_in_price	decimal	one figure of record
published	bool	false while disclosures incomplete

7.6.1 Note

[EXT] One all-in price of record. Drafts interpolate it rather than restating a generated number, so a follow-up can never quote a figure differing from the listing [RES6].

7.7 MESSAGE

Traces to: R-003

Field	Type	Note
id	uuid	pk
customer_id	uuid	fk
body	text	immutable once sent
approval_id	uuid	fk — required before send
sent_at	timestamp	
price_state_snapshot	json	[EXT] price and disclosures as at send

7.7.1 Note

No send path exists without an approval row. Not a setting — a foreign key.

7.8 QUOTE

Traces to: R-002

Field	Type	Note
id	uuid	pk
job_id	uuid	fk
amount_low	decimal	required
amount_high	decimal	required
range_reason	text	why the range is wide
is_preliminary	bool	default true

7.8.1 Note

There is no amount field, and adding one is prohibited. A schema permitting a single figure permits a UI showing one, and BC offers no statutory safe harbour if that figure misleads [RES3].

7.9 TIRE_SET

Traces to: OPP-009

Field	Type	Note
id	uuid	pk
vehicle_id	uuid	fk
season	enum	winter
rack_location	text	
condition_at_storage	text	
stored_on	date	

7.9.1 Note

Condition at storage makes the changeover conversation evidence-based rather than a guess.

7.10 VEHICLE

Traces to: R-001, R-002, OPP-005

Field	Type	Note
id	uuid	pk
customer_id	uuid	fk
vin	text	unique
plate	text	
year_make_model	text	
odometer_km	int	captured at each visit
acquired_from_dealership	bool	links sale to service

7.10.1 Note

Keyed on VIN so the same car is one record whether it is being sold or serviced.

7.11 Architecture

7.11.1 The constraint that shapes everything

AutoOps has no public API — no REST surface, no webhooks, no developer documentation [RES2]. It integrates *outward* into shop-management systems, consuming their APIs. Nothing can be built on top of it.

The integration surface is therefore **the shop-management system underneath AutoOps**, and which one that is remains unknown [OQ4].

7.11.2 Three paths, selected by OQ4

If OQ4 answers...	Path	Shape
Tekmetric, Shop-Ware or Shopmonkey	Integrate with the SMS	AutoOps keeps taking bookings; this system reads and writes the same SMS through its documented API. Lowest duplication.
Mitchell 1, Protractor, R.O. Writer	Request partner access, else operate alongside	No publicly verifiable AutoOps connection [RES2]; SMS API availability must be confirmed vendor by vendor.
No shop-management system at all	This system owns the record	Fully self-contained. More to build, no integration risk.

7.11.3 The honest default

Operate alongside AutoOps, writing to the shop-management system rather than to AutoOps, and owning the customer/vehicle/message record directly.

This is the default because it is **the only path that survives every answer to OQ4**. It works if Brad runs Tekmetric, and it works if he runs a filing cabinet. Committing to an integration architecture before OQ4 is answered would be guessing about the most important unknown in the engagement.

7.11.4 Shape

flowchart TB

```

C["Customer<br>photos · booking"] --> P["Public intake<br>SCR-005, SCR-006"]
P --> Q["Draft generation<br>quote · follow-up"]
Q --> A["Approval queue<br>SCR-003"]
A -->| "Brad approves" | S["Send"]

```

```

A -->|"never auto-sends"| X["Nothing leaves<br/>without a human"]
S --> R["Record<br/>immutable"]
Q --> R
SMS[["Shop-management system<br/>(OQ4)"]] <-.>|"if one exists"| R
A0[["AutoOps<br/>no API – RES2"]] -.>|"bookings arrive,<br/>cannot be called"| SMS

```

7.11.5 Non-negotiable properties

1. **No auto-send path exists in the codebase.** Not a setting, not a feature flag. The send function requires an APPROVAL row [RES3, RES6].
2. **Quotes are ranges at the schema level** — there is no field to put a single number in.
3. **It must work when ignored for a week.** The evidence that Brad does not maintain software is unambiguous [RES5]. Nothing may depend on routine curation: no rules to groom, no templates to keep current, no content to write.
4. **[EXT] sends are blocked, not warned,** when MDAR s.23 disclosures are incomplete [RES6].
5. **Records are immutable once sent,** retaining the price and disclosure state as it was at that moment [RES6].

7.12 Integrations

System	Status	Can we integrate?
AutoOps	Installed and live on 5 of 6 pages; API key in public page source [RES2]	No. No public REST API, no webhooks, no developer docs, no SDK. It consumes SMS APIs; it does not expose one.
Shop-management system	Unknown — OQ4	Depends entirely on which. Tekmetric, Shop-Ware and Shopmonkey have documented APIs and documented AutoOps connections.
Email	No incumbent [RES5]	Yes — net-new
SMS/text	Unknown	Likely; needed for the commuter workflows
WordPress (both sites)	Abandoned installs [RES5]	Possible, but nothing may depend on them being maintained
[EXT] DMS	Unknown — OQ14	Dealership counterpart to OQ4

7.12.1 Do not promise this

“We’ll integrate with your AutoOps.”

There is nothing to integrate with. This must not appear in any client-facing artifact [RES2]. A vendor who says it either has not looked or is guessing, and Brad’s page source disproves it in ten seconds.

7.13 Non-functional requirements

#	Requirement	Why
NFR-1	No customer-facing message can be sent without an APPROVAL row	RES3 commercially, RES6 statutorily
NFR-2	Quotes render and store as ranges only	RES3 — no BC safe harbour for a misleading firm price
NFR-3	System remains correct and useful after weeks of no attention	RES5 — Brad does not maintain software
NFR-4	[EXT] publish and send blocked while s.23 disclosures incomplete	RES6
NFR-5	Sent messages immutable, with price and disclosure state retained	RES6
NFR-6	Public intake requires no account	Requiring one suppresses the intake R-001/R-002 exist to increase
NFR-7	Booking offers early key-drop and after-hours pickup as first-class options	RES4 — 36% of commuters work out of town against 8:30–5:30 hours
NFR-8	Works on a phone, in a bay, with dirty hands	Technicians photograph findings without leaving the hoist
NFR-9	Approval queue is finite and clearable, never an infinite feed	BRAD persona — works in gaps between jobs

Chapter 8

Style

8.1 Style guide

Markdown is canonical; `prototype/styles.css` implements it [Iron Rule 5].

8.1.1 Principle

Brad works in gaps between jobs and replied to a cold email in four minutes [BRAD persona]. The interface is **a queue, not a dashboard**. Density over decoration; a finite list he can clear; nothing that rewards inhabiting the screen.

8.1.2 Tokens

Token	Light	Dark	Use
--bg	#f6f7f9	#12151a	Page ground
--surface	#ffffff	#1a1f27	Cards, rows
--surface-2	#eef1f5	#232935	Subtle fills, table heads
--ink	#161a20	#e8ecf2	Primary text
--ink-2	#5b6572	#98a3b3	Secondary text
--line	#dde2e9	#2c3441	Borders
--brand	#b32218	#e3453a	JB Autocare red — headers, primary action
--accent	#0b6ea8	#4aa8dd	Links, focus
--ok	#1c7a4a	#3fbb7d	Approved, complete
--warn	#a86a08	#e0a13c	Waiting, due
--stop	#a3231b	#e35b52	Blocked, overdue

Token	Light	Dark	Use
--opp	#6b4bb8	#a58ae8	OPP marking — proposed, not requested

Every colour is defined on bare `:root`; dark values are redefined under both `@media (prefers-color-scheme: dark)` guarded by `:root:not([data-theme="light"])` and `:root[data-theme="dark"]`.

8.1.3 Type

System stack — `--apple-system`, "Segoe UI", Roboto, Helvetica, Arial, sans-serif. Numerals tabular wherever money, mileage or counts align in a column. Base 15px, 1.5 line-height.

8.1.4 Components

- **.queue-row** — the primary unit. Left: who and what. Right: the action. One line where possible, two when a quote range is present.
- **.badge** — status. `.badge--ok` `.badge--warn` `.badge--stop` `.badge--opp`.
- **.opp-tag** — a small purple PROPOSED marker. Appears on every screen and nav item that traces to an OPP-### rather than a request. **This marking is non-negotiable** — it is how Brad tells what he asked for from what Altumo is proposing.
- **.ext-tag** — a DEALERSHIP marker for [EXT] scope.
- **.approve-bar** — sticky footer on any screen that sends something. Always two actions: approve-and-send, or edit. Never a bare "send".
- **.range** — a quote figure. **Renders as a range, never a single number** [RES3]. A single number is a defect, not a style choice.
- **.disclosure-block** — [EXT] the five MDAR s.23 fields. Incomplete renders `.badge--stop` and disables the send action [RES6].

8.1.5 Hard rules

1. **No quote renders as a single figure.** `.range` always [RES3].
2. **No send action exists without an approval step** [RES3, RES6].
3. **Every OPP screen is visibly marked.**
4. Wide tables scroll inside `overflow-x:auto`; the body never scrolls sideways.

Chapter 9

The packaging

Chapter 10

The packaging

Standing deliverable set that ships with every system [PKG]. Not requested per project.

Element	This project
Training program	The most important element. Four tracks — approving work (Brad), front counter, in the bay, [EXT] dealership. Hands-on exercises against realistic data, competency checklists, assessment. See <code>training-program.md</code> .
Docs	<code>docs/<topic>/*.md</code> , topic-organised
Web docs	Reachable inside the app — SCR-024
<code>llms.txt</code>	Machine-readable entry point
Unit tests	Real suite, specified alongside the build
API + MCP	Full API surface and an MCP server
Spec docs	This specification

A guided “show me around” tour is a complement to the training program, never a substitute for it. Any built system is useless until people are properly trained on how to use it.

10.0.1 Why training matters unusually much here

The person being trained replied to a cold email in four minutes and has two half-configured websites [RES5, BRAD persona]. A training program that assumes sustained study will not be completed. The Brad track in particular must be short, task-shaped, and finishable in the gaps between jobs — the same constraint the interface is designed around.

Chapter 11

Traceability

Chapter 12

Traceability

12.0.1 Requests → screens

Request	Screens	Covered
R-001 Scheduling	SCR-002, SCR-006, SCR-007	✓
R-002 Quoting from photos	SCR-003, SCR-004, SCR-005, SCR-010	✓
R-003 Follow-up emails	SCR-003, SCR-013, SCR-014, SCR-022 [EXT]	✓

Every request maps to at least one screen. No request is uncovered.

12.0.2 Screens → origin

Origin	Count	Screens
Request (R-###)	10	002, 003, 004, 005, 006, 007, 010, 013, 014, 022
Proposal (OPP-###)	11	008, 009, 011, 012, 015, 016, 017, 018, 019, 020, 021, 023
Packaging (PKG)	1	024
Derivation	1	001

No screen is an orphan. SCR-001 is the only derivation and is justified under the necessity rule: approvals require an identity [RES3, RES6].

12.0.3 Opportunities → evidence

Every OPP cites the research fact that motivated it. Spot-check:

OPP	Motivating evidence	Verifiable how
OPP-001	.firecrawl/jbautocare.com — “Schedule Now” → https://jbautocare.com/	Open the page source
OPP-002	grep -c autoops across 6 crawled pages: 0 on /, ≥1 on the rest	Re-run the grep
OPP-003	.firecrawl/jbautocare.com — Visit the FAQ page faq.md — “123 Main Street, Somewhere, USA”	
OPP-005	RES1 — brad@distinctauto.ca published on both sites	Both contact pages
OPP-008	RES1 (tires a service line) + RES4 (corridor commuters)	Statistics Canada
OPP-018	RES6 — MDAR s.23	BC Laws

No OPP rests on Altumo’s judgement alone.

12.0.4 Provenance audit

Check	Result
Requests originating from client statements only	✓ 3 of 3 — all from F-DOC1-004
Requests originating from research	✓ 0 — none permitted
Research used only to constrain <i>how</i>	✓
Proposals segregated from requests	✓ OPP-###, separate registry, marked in every artifact
[EXT] scope traced to the Altumo decision, not to Brad	✓ DOC1 scope note

12.0.5 Forbidden-content scan

Check	Result
Estimates (durations, dates, costs, points, sizes, velocity)	✓ none
Multi-release language (R1/R2, MVP, phases, roadmap)	✓ none

Check	Result
Claims about the business without a primary source	✓ none
Promise to integrate with a nonexistent AutoOps API	✓ none — explicitly forbidden in <code>out-of-scope.md</code>
Ontario/Manitoba repair law applied to BC	✓ none — RES3 states BC has no such rule