

HOMEOWNER OPERATING SYSTEM

Reference Manual

End User Track · Equiforge

<https://hos.equiforge.ai>

Contents

1.	Introduction
2.	Mission Brief
3.	Unit Economics
4.	90-Day Plan
5.	Engineering
6.	Pipeline
7.	Concierge Demo
8.	Architecture
9.	Documents
10.	Glossary
11.	FAQ
12.	Troubleshooting

1. Introduction

HOS Command Center is the operating console for the Homeowner Operating System built by Equiforge. It exposes eight integrated views that together cover strategy, financials, execution, GTM, AI, architecture, and source documents.

This manual is the canonical reference for the end user audience. For procedures, see the Step-by-Step User Guide. For structured learning, see the Training Course.

Audience.

For homeowners, advertisers, and partner agents who interact with the platform but don't operate it.

2. Mission Brief

Purpose

One-screen operational snapshot: market focus, stack, team, timeline, and workstream progress.

When to use

Daily standup, investor walk-through, status check.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

3. Unit Economics

Purpose

Side-by-side Conservative / Mid / Aggressive scenarios on advertiser count, ARPU, lead volume, and unit margins.

When to use

Pricing decisions, fundraising conversations, scenario stress-testing.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

4. 90-Day Plan

Purpose

Week-by-week sprint plan with phase gates (Advertiser Validation, Internal Beta, Pre-Launch).

When to use

Sprint planning, gate reviews, deadline tracking.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

5. Engineering

Purpose

Active sprint board, backlog, system health, and deployment status.

When to use

Engineering reviews, sprint demos, release planning.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

6. Pipeline

Purpose

Advertiser and partner-agent pipelines across stages (Prospect → Contacted → Demo → Verbal → Signed).

When to use

Sales reviews, GTM forecasting, individual deal qualification.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

7. Concierge Demo

Purpose

Live Claude-powered homeowner chat with property lookup, vendor matching, and intent scoring.

When to use

Product demos, prompt-tuning, vendor-matching validation.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

8. Architecture

Purpose

Five-layer system map: Consumer, Advertiser, Intelligence, Data, Delivery.

When to use

Onboarding engineers, vendor security reviews, dependency mapping.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

9. Documents

Purpose

Canonical source documents (pitch, financial model, legal, brand) with version notes.

When to use

Single source of truth for shared files.

Key controls

Top toolbar switches between the eight views. Cards and tables in each view are read-only summaries; mutations happen via the source systems (Pipeline CRM, Documents library, Engineering sprint board).

10. Glossary

ARPU. Average revenue per advertiser per month.

ARR. Annual recurring revenue = $MRR \times 12$.

BCAD. Bexar County Appraisal District — public property data source.

Concierge. Claude-powered chat interface that matches homeowners to vendors.

Gate. Pass/fail checkpoint on the 90-Day Plan: Validation, Beta, Pre-Launch.

Intent score. 0–100 number expressing how ready a homeowner is to transact.

LTV/CAC. Lifetime value divided by customer acquisition cost. Target $\geq 6\times$.

MRR. Monthly recurring revenue from advertisers.

PWA. Progressive Web App — installable from the browser.

RLS. Row-level security — Postgres policies that scope data per user.

11. FAQ

Who can see the Concierge transcripts?

Equiforge operators and the matched vendor — only after the homeowner books.

How often does property data refresh?

Weekly via the BCAD ingestion job.

What model powers the concierge?

Claude Sonnet 4.6 via the Anthropic API.

Where are secrets stored?

Lovable Cloud secrets — never in source control.

Can I export Pipeline data?

Internal users only, via the Documents library.

12. Troubleshooting

- Concierge not responding — check Anthropic API key status in Lovable Cloud secrets.
- Pipeline empty — confirm seed data toggle in Engineering view.
- Mission Brief progress stuck — workstream owner needs to update the sprint board.
- Document download fails — clear cache or open the file directly from Documents.
- PWA won't install — ensure HTTPS and supported browser (Safari iOS, Chrome Android).