

SALES PORTAL — ARCHITECTURE & 7-DAY PLAN

SCILS + BehaviourMetrics self-scorecard, released to two Design Consultants

DATE

02 June 2026

PREPARED BY

Shane Hammond, MD

RELEASE TARGET

09 June 2026

STATUS

Day 1–2 in flight

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PURPOSE

This document captures the locked architecture and 7-day build plan for the **Trueline Sales Portal MVP** — a hosted, login-gated home for the SCILS training and BehaviourMetrics scorecard tools, released to two Design Consultants by **09 June 2026**.

It supersedes the platform direction previously recorded under the sales sub-project (Entra SSO + Azure Static Web Apps + Supabase) for the v1 release window. The longer-term direction is preserved as a v2 path and is referenced in §04.

ARCHITECTURE — REVISED FOR NETLIFY PATH

The previously sketched stack (Azure Static Web Apps + Microsoft Entra ID SSO + Supabase Sydney) is correct for the eventual platform, but is too heavy to land cleanly inside a seven-day release window. The MVP path is:

ORIGINAL PLAN · V2 TARGET

AZURE SWA + ENTRA SSO

DCs sign in with their existing Trueline 365 accounts. Future option to pull per-user D365 data into the scorecard. Right answer when SSO and CRM integration are needed.

MVP · V1 BUILD

NETLIFY + IDENTITY

Static HTML deployed in minutes. Invite-only login via Netlify Identity (no self-serve signup). Custom domain. Free tier covers two users with room to grow.

The four moving parts of the v1 stack:

<p>Layer 01</p> <p>HOSTING</p> <p>Netlify free tier — static HTML, auto-deploy from main</p>	<p>Layer 02</p> <p>AUTH</p> <p>Netlify Identity — invite-only, per-user login</p>
<p>Layer 03</p> <p>PERSISTENCE</p> <p>localStorage, namespaced by user email (Supabase later)</p>	<p>Layer 04</p> <p>DOMAIN</p> <p>sales.trueline.net.au — CNAME, SSL via Let's Encrypt</p>

Schema-compatible by design. Self-scorecard data is stored under a versioned key keyed to the DC's email. When Supabase is wired in v2, the migration is read-localStorage → POST to API; the data shape doesn't change. No re-work of v1 captures.

— REPOSITORY

- `shanehammond/trueline-sales-portal` — new private GitHub repo, peer of `trueline-design-system` and `trueline-claude-memory`.
- Single-file static site (`index.html`) at repo root, with `netlify.toml` for headers and cache rules.
- Pushes to `main` auto-deploy via Netlify — no separate staging branch in v1.

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LOCKED DECISIONS & DEFERRED ITEMS

— LOCKED FOR V1

- Hosting on Netlify free tier.
- Netlify Identity in **invite-only** mode — no self-serve signup.
- Custom domain `sales.trueline.net.au` from day one.
- Per-user localStorage keyed to DC email — no backend yet.
- Self-scorecard module: 22 behaviours × M/I/S × 1–5 aggregate × 8 categories, matching the BehaviourMetrics teaching module already live.
- Privacy floor: appointment notes capture **customer first name + postcode only** — no surnames, no addresses.
- Language: AU English; "appointment" not "call".
- Recipients: two Design Consultants (named separately).

— DEFERRED TO V2

- Supabase Sydney for per-user persistence and cross-device history.
- Coach / manager view — scorecard intake and team rollup.
- Export-to-email and PDF download flow on submit.
- Audit log of who scored what and when.
- Azure SWA + Entra SSO migration — triggered when D365 data integration is required.
- Wider DC rollout — Netlify Identity free tier signup limit applies if scale grows.

7-DAY PLAN

Counted from the architecture lock on 30 May 2026. Release window closes 09 June 2026.

DAY	FOCUS	OUTPUT	STATUS
DAY 1	Repo + Identity wiring	Private GitHub repo created; SCILS HTML moved to <code>index.html</code> ; <code>netlify.toml</code> , <code>.gitignore</code> , <code>README.md</code> in place; Netlify Identity widget injected with login-gate overlay and user chip in app header.	● DONE
DAY 2	Initial push + Netlify site	First commit pushed to <code>main</code> ; Netlify site provisioned and linked to repo; Identity enabled in invite-only mode; <code>sales.trueline.net.au</code> custom domain added; CNAME target handed to Shane for DNS.	● IN FLIGHT
DAY 3	Module 10 — scoring UI	New module slotted after Appointment Analysis. Appointment context capture (date, customer first name, postcode, opportunity value). 22-behaviour scoring grid with M/I/S three-state and 1–5 aggregate, grouped by 8 BehaviourMetrics categories.	● PENDING
DAY 4	Module 10 — persistence & history	Save scorecard to <code>localStorage</code> under <code>trueline-scils-scorecards-v1:::{email}</code> . "My history" view lists prior self-scorecards with quick re-open. Schema-compatible with future Supabase migration.	● PENDING
DAY 5	Integration & polish	Module 10 added to nav pills; progress counter updated; reflection free-text per category; brand-style review (no red, internal-mode chrome).	● PENDING
DAY 6	End-to-end test + DC brief	Verified flow on a real browser session: login → score → save → reload → review history → logout.	● PENDING

DAY	FOCUS	OUTPUT	STATUS
		Short written brief covering URL, login flow, privacy rules, what to capture each appointment.	
DAY 7	Invites & go-live	Shane sends Netlify Identity invites to the two DCs from the Netlify admin panel. DCs receive email, set password, sign in. First-use feedback captured for v1.1.	● PENDING

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ROLES & OWNERSHIP

- **Shane Hammond, MD** — DNS CNAME on `sales.trueline.net.au` ; sign-off on architecture and module 10 design; Identity invites on Day 7; DC briefing comms.
- **Claude (build agent)** — repo, Netlify config, Identity wiring, module 10 build, end-to-end test.
- **Two Design Consultants** — first users from Day 7. First-week feedback informs v1.1.

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OPEN ITEMS REQUIRING A DECISION

OPEN ITEM	PRIORITY	OWNER
DC identities — names and email addresses for Netlify Identity invites	● HIGH	Shane
DNS CNAME on <code>sales.trueline.net.au</code> — target value supplied once Netlify site is up	● HIGH	Shane
DC briefing comms — written one-pager only, or written + short Loom walkthrough	● MEDIUM	Shane
First-week feedback loop — review cadence with DCs (informal check-in or scheduled session)	● MEDIUM	Shane
v2 trigger — what event prompts the Supabase + coach-view build (volume of scorecards, manager ask, or scheduled)	● LOW	Shane

WATCH POINTS & RISKS

The seven-day window is tight if Module 10 needs material revisions after first DC review. The build path assumes a single-pass scoring UI signed off by Shane on Day 5. If revisions are needed, the go-live slips to Day 8–9. Netlify auto-subdomain is the fallback if DNS lags.

- Netlify Identity free tier has a 5 / month signup limit — fine for two DCs, would constrain wider rollout. Promote to a paid tier if the audience grows past five users.
- DNS CNAME propagation can be slow at some registrars. If `sales.trueLine.net.au` hasn't resolved by Day 6, DCs go live on the Netlify auto-subdomain (`<sitename>.netlify.app`) and we cut over once DNS lands.
- **localStorage is per-device.** If a DC scores on iPad then signs in on a laptop, their scorecard history won't follow them. This is the v2 Supabase fix — flagged in the briefing so DCs know.
- Privacy: the data capture floor (first name + postcode only) needs to hold even under DC pressure to capture more. Reinforce in the Day 6 briefing.