

FLAGSHIP OPERATING SYSTEM (FOS)

App Overview

Flags Unlimited — Version v2.4

Revised Sep 17, 2026 · 79 tools across 6 pillars

Latest release: v2.4 — internal Team Chat with sender attribution, local-time stamps, avatars, @mentions, unread and mention markers, and search by person, channel and time range; phone alerts per device with a test alert and Reply from the notification, plus step-by-step setup instructions in the invite email, the first-day checklist and Platform Settings; the Open Audit Items triage table with filters, sorting, CSV export and required closing notes; accessibility and UX fixes across focus, contrast, labelling and touch targets; clearer guided review for inbound email ingest and internal meeting documents; the rebuilt mobile header and one authoritative page header app-wide; and review-first M&A intake for emailed CIMs.

1. Navigation & Desktop Layout

Surface	Where	What it is
Dashboard (Home)	/hub	Company dashboard — pipeline, field activity, sales metrics and performance by segment. The header logo always returns here.
My Tools	/my-tools	Your starred tools, the six pillar overview cards and the data mode controls. This is where the original Home overview matrix now lives.
Legacy dashboard link	/overview	Old bookmarks redirect straight to Dashboard (/hub); nothing is lost.
Global search	Cmd+K / Ctrl+K	Centered in the desktop header; jumps to any record or screen your role can open.
My Location portal	/my-location	Mobile-first portal for the Location Owner seat: that location's jobs, team, inventory, restock requests and obligations, scoped to their home location.
Competitive Pricing Intelligence	/admin/competitive-pricing	Now its own top-level Command Center sidebar item (previously reached from the M&A Target Matrix).

Layout notes

Desktop (1024px and wider): a collapsible left sidebar carries Dashboard, My Tools and the five pillars; the top header keeps the logo, a centered global search bar, calendar, alerts, refresh and your profile.

Phones keep the horizontal top nav and the scrolling pillar tool row — the sidebar is desktop only.

Global search opens with Cmd+K (Ctrl+K) and searches orders, customers, vendors, products, purchase orders and archived vendor invoice text, scoped to what your role may see.

The sidebar remembers whether you collapsed it, and the open pillar branch always follows the page you are on.

Command Center now lists M&A, Growth, Metrics, CapEx and Competitive Pricing Intelligence as separate top-level items; Competitive Pricing is no longer reached through the M&A Target Matrix.

Location Owners land on the mobile-first My Location portal (/my-location) instead of the company dashboard.

2. Five-Pillar Architecture

Command Center — The daily numbers, the deal pipeline and everything arriving from customers.

Where it lives

Strategy: M&A Target Chart — Acquisition pipeline, scoring matrix and investor briefs.

/management/ma-targets

Contents

App Overview — tap or click a line to jump to that section.

1. Navigation & Desktop Layout	1
2. Five-Pillar Architecture	1
3. Vendor Routing Rules	6
4. User Role Permissions	7
5. Corporate Store Rollout — Launch Gate & Path 2	7
Known Limitations & Open Items	8

Command Center — The daily numbers, the deal pipeline and everything arriving from customers.	Where it lives
Strategy: FOS Strategy — Metro scoring, target sourcing, licensee tracker and the territory map.	/management/fos-strategy
Strategy: Growth Vectors — ICE-scored growth ideas beside the metrics they move.	/management/growth
Strategy: Competitive analysis — Our cost from each supplier, and what competitors charge, spec by spec.	/admin/competitive-pricing
Strategy: CapEx management — Capital requests and approval history.	/management/capex
Orders: Orders — Live Shopify orders still waiting on work or money, plus shipment history & reconciliation.	/ops/order-stream
Orders: Job folders — Every pole job in one list — progress, next step, owner and missing paperwork.	/ops/job-folders
Orders: RFQ automation — Flagpole RFQ pipeline — future shipment dates and customer delivery estimates.	/admin/order-stream/rfq-automation
Orders: Customer message review — AI-drafted replies and check-ins waiting on a human approval.	/ops/customer-drafts
Intelligence & AI: To Do list — Every deadline and commitment in one list — RFQ bid dates from inbound mail, promises made in our outbound replies, plus tasks added by hand.	/todos
Intelligence & AI: Internal Meetings — Agendas, notes and action items for our internal meetings — plus Google Meet write-ups pulled out of Drive for review.	/ops/internal-meetings
Intelligence & AI: Email triage — The triage control room for ingested mail — action board, unsorted ingest, and the Gmail sync switch.	/admin/email-triage
Intelligence & AI: Task steward — AI-suggested follow-up tasks pulled from open work, each waiting on approval.	/admin/task-steward
Intelligence & AI: Catalog ingest — AI extraction of vendor catalog and price-list documents into catalog items.	/admin/catalog-ingest
FOS CRM — Quotes, the pin-drop CRM, market intelligence and everything that wins work.	Where it lives
Pipeline: Sales & Marketing — Every selling tool in one place, with the pipeline up top.	/sales-marketing
Pipeline: Quotes — Premium PDF quotes, e-mail sends and follow-up sequences.	/sales/quotes
Pipeline: Sales funnel — Six stages from bid sourced to order and archive. /sales/pipeline lands here.	/sales/funnel
Pipeline: Quote requests — Native web quote requests, each with a draft quote ready.	/sales/quote-requests
Pipeline: Draft order follow-ups — Aging Shopify draft orders chased with a PDF quote, left unsent in your Drafts folder.	/sales/draft-order-followups
Pipeline: College flags — Sewing Concepts applique flags by school, priced at target margin with lead-time planning.	/sales/college-flags
CRM & leads: Leads — Every captured site, its owner and the next follow-up.	/sales/leads
CRM & leads: Lead Pipeline — Every lead by source and field rep — contact, opportunity and closed revenue, plus duplicate review.	/sales/lead-pipeline

FOS CRM — Quotes, the pin-drop CRM, market intelligence and everything that wins work.	Where it lives
CRM & leads: Prospect Outreach — Premier flagpole prospects, spreadsheet upload, research and AI drafts — one place.	/sales/prospect-outreach
CRM & leads: Marketing Automation — Campaigns, automations, segments and templates — approve, then batch-send from Gmail.	/sales/marketing
CRM & leads: Parent accounts — Roll every branch location up to one organisation.	/sales/parent-accounts
CRM & leads: Opportunity & bid board — Sourced bids and opportunities with AI relevance scoring and RFP drafting.	/sales/opportunities
CRM & leads: FOS CRM — General contractor contacts, bid history and cold-account nudges.	/sales/crm
CRM & leads: Customer PO — Purchase orders customers send us — parsed automatically, each one becomes a Shopify draft order.	/ops/customer-pos
CRM & leads: Customer invoices — Commercial invoice PDFs, deposits and the live balance due.	/finance/customer-invoices
Revenue expansion: National accounts — Enterprise multi-site prospects and how much of their footprint we cover.	/sales/national-accounts
Revenue expansion: FlagAssurance — Paid replacement plans priced off observed FlagWatch wear.	/sales/flag-assurance
Revenue expansion: Retail distribution — Wholesale rack partners carrying the private-label program.	/sales/retail-distribution
Marketing — What customers are saying, the campaign calendar and new target hunting.	Where it lives
Marketing: Voice of the Customer — Monthly themes across closeout notes and portal feedback, linked to the source records.	/ops/voice-of-customer
Marketing: Customer reviews — Google, Facebook and imported reviews by branch, with alerts on one- and two-star feedback.	/ops/reviews
Marketing: Marketing ideas — ICE-scored campaign ideas and what shipped.	/sales/marketing-ideas
Marketing: Marketing events — Shows, parades and seasonal pushes on one calendar.	/sales/marketing-events
Marketing: Event invitations — Open houses and networking nights read out of inbound email.	/sales/event-invitations
Marketing: Lead Prospector — Municipal bids, CRE/HOA, veterans' posts and large-flag account hunting.	/sales/prospector
Field Operations — Dispatch, today's routes, the asset map and proof the work got done.	Where it lives
Dispatch: Ops board — Installations and service calls side by side with profitability.	/ops/board
Dispatch: Flagpole Tracker — Spreadsheet view of installs, service, pole inventory and bids.	/ops/flagpole-tracker
Dispatch: Service calls — Intake, triage and dispatch of inbound requests.	/ops/service-calls

Field Operations — Dispatch, today's routes, the asset map and proof the work got done.	Where it lives
Dispatch: Installs — Scheduling, crews and status for installs.	/ops/jobs
Dispatch: Book a service visit — The public booking form customers use to request a visit.	/book
Dispatch: Service intake links — Share the customer service request form, or a link filled in per customer.	/ops/service-intake-links
In the field: Asset & site map — Every flagpole we service, plotted and searchable.	/map
In the field: Maps & Location Services Diagnostic — Live checks for the map, address lookups, driving mileage and nearby places.	/admin/diagnostics/maps-check
In the field: Today's routes — The mobile tech view: today's stops, in order.	/today
Proof & stock: Closeouts — Completion proof: photos, condition scores and sign-off.	/ops/closeouts
Proof & stock: FLAGSHIP Institute — Tech certification, annual expiry and the dispatch gate it drives.	/ops/institute

Supply Chain — Purchase orders, vendors, inbound freight and what is actually on the shelf.	Where it lives
Purchasing: Purchase Orders — Build, send and chase outbound vendor POs — drafts, sent and awaiting delivery.	/admin/purchase-orders
Purchasing: Fulfillment & Vendor Routing Rules — Fulfillment rules (single-vendor freight consolidation) and vendor routing, including exclusive Space Force items.	/admin/purchase-orders
Purchasing: FOS Marketplace — Network-wide ordering, margin captured and off-network leakage.	/procurement/marketplace
Vendors: Flag compliance — Domestic-origin status per catalog item, verified by hand and audit-logged.	/procurement/compliance
Vendors: Vendor directory — Flagsource, Eder Flag, Flagco and FlagZone scorecards.	/ops/vendors
Vendors: Vendor parser audit — What the parser read from each confirmation, and unmatched ones to correct.	/admin/diagnostics/vendor-parse-audit
Vendors: Vendor label templates — Teach the parser new supplier wording for PO numbers and ship dates.	/admin/vendor-label-templates
Inbound & stock: Fulfillment analytics — Vendor responsiveness, pick/pack, transit and end-to-end timing with automated tracing.	/admin/supply-chain/fulfillment-analytics
Inbound & stock: Receiving — Receiving manifests for FS, ED, FC and FZ purchase orders.	/ops/receiving
Inbound & stock: Pole Inventory — Physical stock counts, independent of Shopify dropship skew.	/ops/inventory
Inbound & stock: Warehouse safety stock & reorder alerts — Low-stock and velocity-driven reorder warnings.	/admin/warehouse

Finance/HR — Payroll, time off, invoices, the vendor invoice archive and who can do what.	Where it lives
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Finance/HR — Payroll, time off, invoices, the vendor invoice archive and who can do what.		Where it lives
Payroll & time: Finance/HR — The finance landing page: invoices, payroll and approvals.		/finance
Payroll & time: Approvals — Everything waiting on a decision, in one prioritised inbox.		/finance/approvals
Payroll & time: Job Costing & Profitability — Order net profit, thin-margin alerts, uncosted orders and CSV export.		/finance/job-costing
Payroll & time: Timecards — W-2 hours by week, with payroll analytics.		/finance/timecards
Payroll & time: Time off — Request days off; any Super Admin approves and it blocks dispatch.		/finance/time-off
Payroll & time: Payroll analytics — Labour cost trends across crews and weeks.		/finance/payroll
Front desk & invoices: AR collections — Overdue balances and AI-drafted collections letters awaiting human approval.		/finance/collections
Front desk & invoices: Call log — Phone calls, follow-ups and attachments in one shared log.		/sales/call-log
Front desk & invoices: Integration settings — Domain and DNS health, credentials and keys, live connection tests, plus the Drive invoice filename pattern.		/admin/integration-settings
System & access: System settings — Users, integrations, Shopify and system health.		/admin
System & access: Permissions matrix — Which roles can view, edit or delete in each module.		/permissions
System & access: Tools & Modules Catalog — Every screen in the platform with a description and a direct link.		/tools-catalog
System & access: RBAC permissions — Tick a tool on or off per role; locked tools show an access screen.		/admin/settings/rbac
System & access: Pillar display names — Rename the five main sections without a code change.		/admin/settings/pillar-names
System & access: Search vocabulary — Teach # K new w without a release.		/admin/settings/nav-vocabulary
System & access: Search analytics — Top queries, no-r spike alerts.		/admin/diagnostics/search-analyti cs
System & access: Duplicate review — Confirm or reject possible duplicate companies found across modules.		/admin/entity-merge
System & access: Business rules registry — Every special-case rule: vendor exclusivity, freight, pricing and payroll locks.		/admin/settings/business-rules
System & access: Web crawl health — Crawl usage by feature, plan quota, cache savings and the failure log.		/admin/settings/firecrawl

3. Vendor Routing Rules

Vendor	Covers	Terms	Rule
Flagco	Commercial flagpoles	Contract / list	Primary vendor for all commercial flagpoles. Portal availability is checked before the PO is sent; anything not in stock becomes an RFQ to Mitch.
FlagZone	U.S. Space Force items (exclusive)	Contract / list	Exclusive source for every U.S. Space Force item — no other vendor may be assigned.

Vendor	Covers	Terms	Rule
Flagsource	Flags — primary source	Contract / list	Primary flag vendor. July 2026 contract pricing overrides catalog list.
Eder Flag	Hardware and parts	50% off catalog	General hardware and parts, plus residential aluminum poles, at 50% off catalog list.
Zeus Flagpoles	Fiberglass flagpoles	Contract / list	Sole exclusive supplier for every fiberglass flagpole — the Flagco aluminum portal check is skipped. February 2026 wholesale net costs plus volume tier discounts apply.
Annin Flagmakers		Contract / list	Tertiary soft goods source — used when Flagsource and Eder both cannot fill the line.
Concord American Flagpole		50% off catalog	Third-choice hard goods source (dealer CFD3970, 50% off MSRP, NET 30). Normally only used when an RFQ explicitly requires a Concord pole.
Concord American Flagpole	Flagpoles and hardware — dealer cost catalog	Dealer cost list (2026)	2026 dealer workbook loaded as cost/sourcing data (1,361 SKUs, category-aware finishes and quantity breaks). Used for redundancy quotes and SKU lookup in RFQs and POs; flagged stale 12 months after the 2026 effective date.
Eder Flag (catalog)	Catalog cost data and competitor list pricing	50% off catalog list	The 2026 catalog is ingested twice: as vendor cost at 50% of Eder list, and as direct competitor retail pricing for the Competitive Pricing module. Low-confidence extractions go to the catalog review queue before use.

4. User Role Permissions

Role	What the seat is for	Tools available
Super Admin	Full access, including Business & Strategy, permissions and every admin setting. You approve price changes, role grants, capability flags and financial exceptions.	61
Flags Unlimited Employee	The single staff seat: calls, quotes, RFQs, jobs, scheduling, field work and customer follow-up. It replaces the old Admin / Front Desk, Office and Field Tech seats. What you personally can do inside it is set by capability flags — can_see_cost (vendor cost and margin), can_see_payroll (timecards and pay), can_quote (send priced quotes) and dispatch_eligible (be scheduled to a job, still earned through certification, never granted by hand). Back-office queues such as invoices and payments open only with the back-office capability. Business & Strategy is not part of this seat.	51
Finance	Invoicing, collections, payroll and vendor bills. You work the money side of jobs that operations has already closed out.	14
Location Owner	Your own location, on a phone: today's jobs and service calls, your team, local inventory and restock requests, and the obligations your location owes. Everything is scoped to your home location — no other location's data is visible.	4

5. Corporate Store Rollout — Launch Gate & Path 2

Rule
Launch readiness runs as two parallel tracks: Track A — market and partner readiness (metro selection, install partner recruiting, certification); Track B — physical location readiness (site control, lease, build-out, inventory).
Path 1 — Company-Operated: both tracks run. The location holds its own site control and Track B must complete before opening.

Rule

Path 2 — Partner-Hosted: the store operates inside an existing partner's facility, so Track B collapses. Instead, a partner site arrangement record captures site suitability (space, storage, access, signage, customer-facing area) and the fulfillment arrangement (who stocks, who picks, who ships, revenue split and term).

Market coverage gate (both paths): a location cannot be set to Open until it has two certified primary install partners plus one certified backup in its market. The gate is enforced by a database trigger, and the stepper shows the shortfall until it is met.

Certification, not role, decides dispatch: an Employee is dispatch-eligible only through the certification-derived flag, which the merged role did not widen.

Every launch step transition is written to the location's launch history, so 'when did this store become Open, and who cleared the gate' is answerable after the fact.

Known Limitations & Open Items

Item	Status	Where it shows up	What is not finished
AR Aging due-date scope	Open	Finance / AR Collections / Aging (/finance/ar)	Aging buckets are calculated from the invoice date, not a per-customer due date or terms schedule. Invoices on net-30/net-60 terms therefore appear in an older bucket than they truly are. Treat the bucket as an ordering hint, not a legal past-due statement, until terms-aware due dates ship.
Parent-account discount precedence	Partial	Sales / Quotes, RFQ pricing	Precedence logic (site / parent account / default) is implemented and unit-tested, but no parent accounts exist in production data yet, so it has never been exercised against a real hierarchy.
Shopify write scopes	Partial	Business & Strategy / Suggested Price Adjustments	Catalog reads, draft orders and checkout QR codes are live. Price write-back from the Suggested Price Adjustment queue depends on write scopes that are not granted on the current token, so approvals may need to be applied manually.
External Outreach Lock is ON	Open	Admin / Outreach Lock (/admin/outreach-lock)	No customer- or vendor-facing email leaves the app while the lock is engaged. Quotes, vendor RFQs and AR reminders generate drafts only — someone still sends them by hand.
Vendor catalog data is dated 2026	Partial	Inventory & Vendors / Vendor Directory, Catalog Review Queue	Concord American dealer costs and the Eder Flag catalog are loaded from the 2026 editions and stamped with that effective date. Rows flag as stale 12 months out, and low-confidence extractions sit in the catalog review queue until a human confirms them — check the confidence badge before quoting off a parsed line.
Master Playbook figures carry confidence ratings	Partial	Command Center / Growth / Living Playbook	Playbook sections mix live data embeds with transcribed reference tables. Transcribed figures print a confidence badge; anything below high confidence is a planning estimate, not a committed number.
Location Owner portal is validated on Kentwood only	Partial	My Location (/my-location), Network Health Dashboard	The location_owner seat and the /my-location portal are exercised against 01 — Kentwood, the only location with real operating history. Other locations show "No actuals yet" until they have real data.