

Quarters

The CRM for founder-led sales.

Quarters is a CRM that starts from a different premise: as a founder, **you already have a CRM — it's your inbox, your texts, your Slack, and your calendar.** The product's job is to read that record faithfully, keep you in touch with the real people in it, and put a draft in your hand at the right moment — while **you** stay the only one who ever hits send. This manual explains how each part works. Every factual claim in it was checked against the running code; the anchors are in the appendix.

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Why Quarters exists

Founder-led sales doesn't fail for lack of effort. It fails quietly, in the gaps: the investor you meant to update six weeks ago, the warm intro that went cold because the follow-up slipped, the customer whose last three messages are sitting in an inbox behind forty newsletters. Traditional CRMs answer this with data entry — they are empty until you feed them, and founders don't feed them.

Quarters inverts that. It connects to the places your relationships already live and treats *them* as the system of record. From that record it computes who's going quiet, drafts what you might say, and queues it for your review. The product is opinionated about four things, and every feature in this manual is downstream of them:

REAL PEOPLE ONLY

Nothing Quarters suggests is a robot. Newsletters, no-reply senders, and role inboxes are filtered out of every metric, list, nudge, and campaign — enforced in code at each surface, not by an LLM's good manners.

EVERY CHANNEL IS THE RECORD

Email, Slack, iMessage/SMS, and calendar meetings all count as "touch." A text answered yesterday means that relationship is **not** overdue, even if the last email was a month ago.

A HUMAN SENDS EVERYTHING

Every outbound email — one-off or campaign step — lands in your Outbox for review first. LinkedIn messages are never automated at all; Quarters writes the draft and creates a to-do. A workspace-level kill switch ships **off** and blocks sending until you enable it.

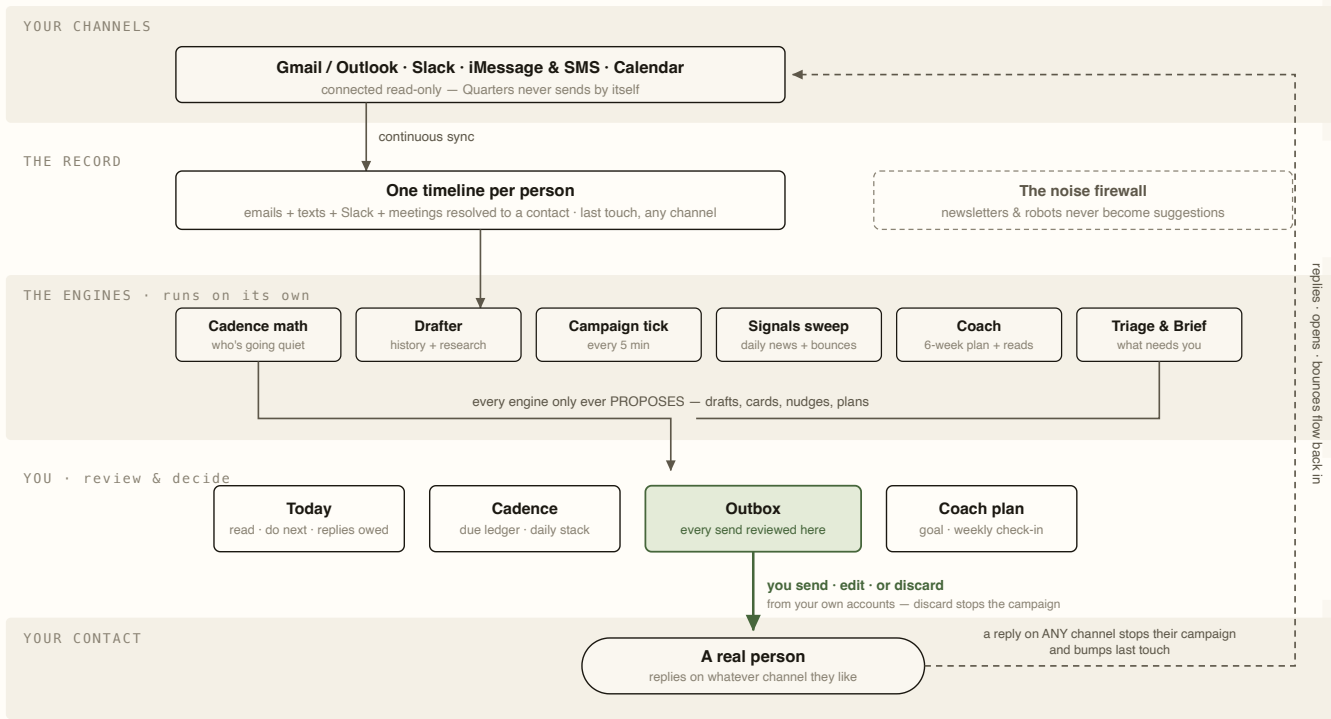
HONEST NUMBERS

Counts are computed from your data, never generated. Where AI narrates ("you sent 14 messages to 9 people"), the numbers are calculated first and the model is told to narrate them — not to make them up.

Verified: automated-contact filters (`isTransactionalContact` , `isAutomatedContactName`) gate metrics, cadence, lists, campaigns, signals, briefs & coach · last-touch is bumped by every event write *and* past calendar meetings · outbound kill switch fails safe to disabled (`flag !== false → disabled`) · coach numbers are "ground truth — narrate, don't recompute" in the prompt itself.

How it fits together

Quarters is a loop, not a database. Your channels flow in at the top; engines compute over the record; surfaces propose work; you review and send from your own accounts; and what comes back — replies, opens, bounces — feeds the next pass of the loop.



The Quarters loop. Channels sync into one per-person timeline; six engines compute proposals over it; you accept, edit, or discard from the review surfaces; sends go out through your own accounts; and everything that comes back re-enters the record. The single green edge is the only place a message leaves the building — and it's yours.

Your world, synced in

You connect Quarters to the accounts you already use. Nothing about your workflow changes — you keep emailing from Gmail, texting from Messages, and taking meetings from your calendar.

- **Email** — Gmail and Outlook/Microsoft 365, via OAuth. First sync reaches back through your history; ongoing sync keeps a watermark so nothing is missed or duplicated.
- **Slack** — direct messages with your contacts appear on their timelines.
- **iMessage & SMS** — the Quarters desktop app for Mac reads your Messages history locally and syncs it; on Windows, a companion agent reads your iPhone backup (including encrypted backups). Texts are often where founder relationships actually live, and most CRMs are blind to them.
- **Calendar** — meetings count as touches, feed the Coach's "customer-facing time" math, and seed conversation topics.

One person, one timeline

Every synced message resolves to a person through an identity table — a contact's email addresses and phone numbers all map to the same record, so the email thread and the text thread appear as one relationship. From this, Quarters maintains a single **last-touch** clock per contact that any channel can bump, including a calendar meeting you actually held. That clock is what "overdue" means everywhere in the product.

The noise firewall

Sync is promiscuous; suggestion is not. Senders that look automated (no-reply addresses, newsletters, notification robots) are blocked from becoming contacts at creation time, and a contact that slips through is excluded from every metric, cadence, brief, campaign, list-import, signal, and coach suggestion by the same pair of checks. You can also archive a contact or mark them *do-not-campaign*, and every engine respects both flags.

Privacy: the tracked model

Texts are personal, so message **content** from iMessage/SMS is only stored for contacts you explicitly track — untracked texters contribute timing metadata (so last-touch stays honest) but not words. OAuth tokens for your connected accounts are encrypted at rest with AES-GCM, and each workspace's data is isolated by row-level security in the database.

Verified: identity resolution via `crm_identities` (email + phone types) · last-touch bumped on every event write and by past calendar meetings (`bumpContactLastTouch`) · creation guard in `findOrCreateContact`; suggestion gates via `isTransactionalContact` / `isAutomatedContactName` · iMessage/SMS body storage gated on `contact.tracked` (`shouldStoreBody`) · token encryption in `_crypto.ts` (`enc:v1: AES-GCM`).

Your day: Today & the Brief

Today is the page Quarters opens on, and it's built to be the only tab you need before your first coffee ends:

- **The morning read** — a short, regenerated-daily paragraph from your coach recapping what you actually did yesterday (messages sent, people reached, customer-facing hours, deals moved) and where that leaves you against your goal. The numbers are computed; the model only narrates them.
- **Important replies owed** — inbound messages from real people that you haven't answered, judged by a classifier plus deterministic filters, so an automated receipt never nags you.
- **Do next** — a blended list of the day's moves: overdue cadence touches, plan commitments, and suggested actions, each traceable to a specific person, count, or date.
- **Waiting on them** — the inverse: threads where the ball is in their court.

The Brief

The Brief is Today, delivered. On a schedule you set (defaults: 08:00 and 16:00 in your timezone), Quarters triages the window since your last brief and sends a digest by **email**, optionally as an **audio podcast** in a voice you pick, and optionally by **SMS**. Items are grouped into action / info / quiet, and automated senders are screened out before the model ever sees the candidates. You can also forward links (articles, videos) to your brief address and they come back summarized in the next edition.

Verified: morning read cached once per local day (`morningRead.date === todayKey`) · brief defaults times: ["08:00", "16:00"], channels `email · audio · sms` · deterministic pre-screen (`isAutomatedSender` + noise-contact set) ahead of LLM bucketing · link ingestion via the `brief@` inbound branch.

Staying in touch: Cadence

A cadence is a promise to yourself about how often a relationship should hear from you.

Quarters keeps three tiers, and the due-math runs off the cross-channel last-touch clock — answering someone's text resets their email cadence too, because you were in touch.

TIER	RHYTHM	AUTO-ASSIGNED WHEN...
Weekly	every 7 days	≥ 8 real exchanges in the last 90 days
Monthly	every 30 days	≥ 3 real exchanges in the last 90 days
Quarterly	every 90 days	an established but lighter-touch relationship

You can set cadences by hand (drag a person onto a tier), or let **auto-fill** analyze your last 90 days and propose tiers using the thresholds above — with floors that require genuine two-way conversation, so a newsletter can never earn a cadence. The Cadence page reads as a ledger — *Due now* → *Coming up* → *On track* — with the board view one toggle away.

Drafts that know the relationship

When someone comes due, Quarters pre-drafts the touch. Drafts are grounded in three sources: your actual history with the person, their researched context (Quarters runs periodic web research on cadenced contacts and tags them with live topics — a funding story, a launch, a post), and your own updates. The **daily stack** serves these as swipeable cards — save it to your Outbox, edit it first, or skip it — and each decision teaches the drafter what "relevant" means for you, measured honestly with save-rates and edit-distance on a stats page.

Verified: `CADENCE_DAYS = weekly 7 / monthly 30 / quarterly 90` · auto-fill buckets
`n ≥ 8 → weekly, n ≥ 3 → monthly, else quarterly` with two-way floors and org-name/transactional exclusions
 (`handleAutoCadence`) · research sweep gated to engageable contacts · stack serving + save/edit/skip ladder events
 in `_quarters_core.ts` / `_quarters_engine.ts`.

Finding people: Lists

Lists is Quarters' prospecting workbench, and it comes with an unusual constraint that's really a feature: **there is no purchased data behind it**. No Apollo, no ZoomInfo, no scraped LinkedIn sessions. When you ask Quarters to find people, an AI plans real web searches, reads the public pages it finds — directories, team pages, press — and extracts named people with a source link for each. What you get is fresher than a stale database row, and every row can show you where it came from.

- **Find people / Find companies** — a filter wizard (titles, industries, keywords, location, company size) that returns a *preview* first; nothing enters your list until you check the candidates you want and commit. When direct people-search runs thin, it hops through companies to find the humans inside them.
- **Import CSV** — bring your own list; duplicates are detected by email *and* by name + company, so re-imports don't double up.
- **Research selected** — one AI-written dossier line per person, with confidence and source links.
- **Find contact info** — email discovery labeled honestly: *published* (found on a page) vs *inferred* (pattern-guessed), each with a live mail-server (MX) check so you know before you send.
- **Add to CRM & Enroll** — good rows become contacts (the real-person firewall applies even here — a "Newsletter Team" row gets skipped and labeled, not imported) and can be enrolled straight into a campaign.

Verified: search + LLM extraction pipeline in `_lists.ts` (plan → search → full-page fetch → extract; LinkedIn down-ranked, one page per host) · preview-only find (`handleListFindPeople` inserts nothing) · dual dedupe keys (`listRowDedupeKeys`) · published/inferred + MX pills · non-person rows skipped with `crmSkipped: not_a_person` .

Reaching out: Campaigns

A campaign is a small, honest sequence: up to 10 steps over email and LinkedIn, with real scheduling and real stop conditions. It automates the *clockwork* of following up — never the sending.

Steps and timing

- Each step waits 0–90 days after the previous one, can carry an absolute "not before" date (interpreted in the campaign's timezone), and only fires inside your send window (e.g. 9:00–17:00) on business days if you say so.
- Steps can be conditional on the previous email: run *always*, *if opened*, or *if not opened* — powered by an open-tracking pixel on mail you send through Quarters.
- Templates use merge tags — `{{firstName}}`, `{{name}}`, `{{company}}`, `{{title}}` — validated when you save, so a typo'd tag can't silently render "Hi ,". Optional per-step AI personalization adapts your template using the contact's notes and recent cross-channel history, with your template as the fallback.

The Outbox: staged is not sent

When a step comes due, the engine (which runs every 5 minutes) *stages a draft into your Outbox*. You read it, edit it, and send it — or discard it, which stops that person's campaign entirely, because a rejected message is a decision. Follow-up steps wait while the previous email is still sitting unreviewed; an open-gate is never evaluated against mail that hasn't actually gone out. LinkedIn steps never send anything anywhere: they create a to-do with a ready-to-copy draft, and the campaign politely waits (up to a week) for you to do it.

Stop conditions & guardrails

EVENT	WHAT HAPPENS
They reply	Campaign stops — a reply on <i>any</i> channel counts (email, text, Slack). Out-of-office auto-replies are recognized and don't count.
Mail bounces	Campaign stops. The engine watches your mailbox for delivery-failure notices naming the contact.
Do-not-campaign / archived	Never enrolled; if flagged mid-campaign, stopped at the next tick.
Not a real person	Newsletters, role inboxes, and org-name contacts are refused at enrollment and re-checked at every step.
Daily volume	At most 25 campaign emails staged per workspace per day — overflow rolls to tomorrow's window. Protects your domain reputation.
Duplicates	One active enrollment per person per campaign, enforced by the database itself.

Every enrollee's dossier shows a campaign chip; the campaign page shows a per-step funnel (staged → sent → opened → replied → skipped) computed from what actually happened.

```
Verified: MAX_SEQUENCE_STEPS 10 · delayDays 0-90 · zoned not-before date ( zonedDateTime ) · gates via
evaluateStepGate + pixel at /track/open/<id>.gif · save-time validation ( sequenceDraftProblems ) · 5-min
pg_cron tick with claim-based concurrency · defer awaiting_outbox_review ; discard → draft_discarded stop ·
```

any-channel reply stop with 000 regex · bounce scan of daemon mail · `SEQUENCE_DAILY_STAGE_CAP 25` · partial unique index `crm_sequence_enrollments_one_active` · LinkedIn wait ≤ `LINKEDIN_WAIT_MAX_MS` (7 days).

08 · TIMING

Knowing when to move: Signals

The best outreach has a reason. Once a day, Quarters sweeps the companies attached to the real people you're actively working (cadenced or tracked contacts) and looks for news worth acting on. A signal is only recorded if the model can cite a live source URL for it — no link, no signal.

- **Kinds:** funding · acquisition · launch · press · job change.
- **A first-party edge:** your own mailbox is a job-change detector no data vendor can match — a hard bounce on someone's corporate address becomes a job-change signal with the evidence attached.
- Signals appear in the contact's dossier with the source link and age, and every contact has a *Check now* button when you want an answer today.

Verified: daily sweep (pg_cron, 13:07 UTC) over cadenced/tracked contacts with company names, non-person contacts excluded · classifier enum `funding | acquisition | launch | press | job_change | none` with required `sourceUrl` (dropped otherwise) · bounce → `job_change` path in `handleSignalsSweep`.

09 · REVENUE

Deals, Forms & Meetings

Pipeline

Deals move across a board whose default stages are *Intro* → *Qualification* → *Demo* → *Negotiation* → *Acceptance* → *Active Use* (with *Did Not Sign Up* as the honest exit); you can customize the stages. A deal page is a workspace, not a form: an activity log of every stage change and note, a checklist, the relevant contacts (deals can have several), and a merged conversation view that pulls the actual threads with those people — plus a composer to reply in place.

Forms

Publishable, brandable pages for events and feedback. A public submission becomes a contact and a first-stage deal automatically — the one place creation is automatic, because the person just introduced *themselves*.

Meetings

Paste a transcript, upload a recording, or send a notetaker bot to a live meeting. Every path converges on the same analysis: summary, sentiment, objections, buying signals, action items, and a drafted follow-up — attached to the contact and/or deal.

Verified: `DEFAULT_PIPELINE_STAGES` (7 stages, customizable via `stageOptionList`) · deal activity log + multi-contact (`deal.contactIds`) · form submission → contact + first-stage deal (`crm_forms` / `crm_form_submissions`) · meeting sources `paste | audio | recall` in `_meetings.ts`.

The Coach & Frameworks

Everything so far keeps you moving. The Coach decides *where*. You state a goal in your own words; Quarters turns it into a **six-week plan** — a Monday-anchored arc of weekly focuses grounded in your real numbers, your open deals, and your actual recent conversations (real names, from your record). Weeks you've already lived are never re-planned: each weekly check-in carries your reflections forward and reshapes only what's ahead. At day 42 the cycle completes and you start the next one — revisit the goal, keep the history.

The Coach also writes the two daily/weekly "reads" you'll actually see most: the morning read on Today and a six-week review with receipts (every claim in it names who and when).

Frameworks: coaching with a spine

You can adopt a published **coaching framework** — a named coach persona with a real methodology: a north star, a six-week arc of weekly focuses and targets, voice rules (always / never), and priority levers. Adoption is deliberate and consent is versioned:

- The framework genuinely frames your coaching — its voice, its arc-week focus, and its priorities are injected into the plan, the weekly read, and the morning read.
- What you adopted is what you get: Quarters snapshots the framework at adoption, so a mid-cycle edit by its author can't silently change your coaching. If a coach withdraws their framework, it stops coaching you immediately.
- One switch per cycle: you can change frameworks once mid-cycle; after that, the cycle runs its 42 days. A daily stack of up to 8 suggested touches follows the framework's current week, and Monday feedback in the coach's voice scores last week against its targets using your real outreach counts.

The plan is a contract between two honest parties: the model narrates only numbers Quarters computed, and Quarters only schedules work you explicitly accepted.

Verified: plan = 6 weeks / 42 days, Monday-anchored (`coachPlanMondayOf`) · past-week carry-forward + reflections fed to regeneration (`handleCoachPlanGenerate`) · persona injection via `personaPromptBlock` into plan / weekly read / morning read · adopt-time `personaSnapshot`; removed coach → resolver returns null · switch budget enforced by `canAssignPersona` · daily stack size 8 · Monday feedback counts real ladder events (`saved` / `edited_saved` / `sent`).

Safety & privacy, in one place

- **Outbound is off until you turn it on.** A workspace kill switch ships disabled and fails safe — an unknown workspace is treated as disabled. Drafts still stage for review; nothing sends.
- **A human sends every message.** Campaign emails stage to the Outbox; one-off drafts go through the same composer; LinkedIn is drafts-and-to-dos only, by design and by hard line.
- **Real people only, enforced.** The automated/transactional checks gate contact creation, metrics, cadence, the daily stack, briefs, suggested actions, the coach's inputs, list imports, signals, and campaign enrollment.
- **Text privacy is opt-in.** iMessage/SMS message bodies are stored only for contacts you track.
- **Your credentials are protected.** OAuth tokens are encrypted at rest (AES-GCM); workspace data is isolated with row-level security; scheduled jobs authenticate with a rotatable secret held in a vault, not in code.
- **Volume is bounded.** 25 staged campaign emails per day, 100 enrollments per action, one live enrollment per person per campaign.
- **One plan.** Quarters has a single subscription tier — no feature matrix to decode.

Verified: `isOutboundEmailDisabled` fail-safe · compose path server-gated · LinkedIn task-only in the tick · gate list per audit batches A–C (2026-07-08) · `shouldStoreBody` tracked gate · `_crypto.ts` AES-GCM + RLS on all `crm_*` tables + Vault cron secret · caps as in §07 · single "standard" plan.

Verification appendix

Every material claim in this manual was tested against the Quarters codebase (edge API `supabase/functions/crm-api`, web app `apps/web/app.js`) on July 8, 2026. Anchors below are the function or constant that implements the claim.

#	CLAIM	CODE ANCHOR	
1	Cadence tiers are 7 / 30 / 90 days	<code>CADENCE_DAYS</code> , <code>index.ts</code>	✓
2	Auto-cadence: $\geq 8 \rightarrow$ weekly, $\geq 3 \rightarrow$ monthly, else quarterly (90-day window)	<code>handleAutoCadence</code>	✓
3	Last touch is cross-channel incl. calendar	<code>bumpContactLastTouch</code> + calendar bump	✓
4	Automated senders can't become contacts; non-people gated across surfaces	<code>findOrCreateContact</code> guard; <code>isTransactionalContact</code> / <code>isAutomatedContactName</code> call sites	✓
5	iMessage/SMS bodies stored only for tracked contacts	<code>shouldStoreBody</code>	✓
6	Outbound kill switch defaults off, fails safe	<code>isOutboundEmailDisabled</code> (<code>flag !== false</code>)	✓
7	Brief defaults 08:00 + 16:00; email / audio / SMS channels	<code>DEFAULT_BRIEF_SCHEDULE</code>	✓
8	Morning read regenerates once per local day	<code>morningRead.date === todayKey</code> cache	✓
9	Campaigns: ≤ 10 steps, 0–90-day waits, send windows, business days	<code>MAX_SEQUENCE_STEPS</code> , <code>normalizeSequenceStep</code> , <code>computeNextSendAt</code>	✓
10	"Not before" dates honor the campaign's timezone	<code>zonedDateString</code> in <code>computeNextSendAt</code> (+ LA test)	✓
11	Open gates use a tracking pixel	<code>/track/open/<trackingId>.gif</code> ; <code>evaluateStepGate</code>	✓
12	Engine ticks every 5 minutes; concurrency-safe claims	<code>pg_cron</code> <code>quarters-sequences-tick</code> ; conditional claim PATCH	✓
13	Follow-ups wait for unreviewed drafts; discard stops the campaign	<code>awaiting_outbox_review</code> defer; <code>draft_discarded</code> stop	✓
14	Reply on any channel stops a campaign; OOO ignored	<code>sequenceContactReplied</code> + <code>AUTO_REPLY_RE</code>	✓
15	Bounce detection from your own mailbox stops campaigns / makes job-change signals	<code>looksLikeBounce</code> ; bounce branch of <code>handleSignalsSweep</code>	✓
16	25 staged campaign emails / workspace / day; 100 per enroll; 1 live enrollment per person per campaign	<code>SEQUENCE_DAILY_STAGE_CAP</code> ; <code>MAX_ENROLL_PER_CALL</code> ; unique index <code>crm_sequence_enrollments_one_active</code>	✓
17	LinkedIn steps are to-dos with drafts, never sent; ≤ 7 -day wait	LinkedIn branch of tick; <code>LINKEDIN_WAIT_MAX_MS</code>	✓
18	Merge tags validated at save; unknown tags rejected	<code>sequenceDraftProblems</code> , <code>KNOWN_MERGE_TAGS</code>	✓
19	Lists: no data vendors; search + read + extract with per-row sources; preview-then-commit	<code>_lists.ts</code> pipeline; <code>handleListFindPeople</code> (no inserts)	✓
20	Email discovery labeled published vs inferred, with MX check	contact-info handler + MX DNS-over-HTTPS probe	✓

21	Signals require a source URL; five kinds; daily sweep	<code>SIGNAL_CLASSIFY_SYSTEM</code> , <code>parseSignalResult</code> ; cron 13:07 UTC	✓
22	Default pipeline stages (7, customizable)	<code>DEFAULT_PIPELINE_STAGES</code> , <code>stageOptionList</code>	✓
23	Form submission → contact + first-stage deal	forms submit handler (contact + first-stage deal)	✓
24	Meetings via paste / audio / notetaker bot, one analysis	<code>_meetings.ts</code> source: paste audio recall	✓
25	Coach plan: 6 weeks / 42 days, Monday-anchored; check-ins carry history	<code>coachPlanMondayOf</code> ; carry-forward in <code>handleCoachPlanGenerate</code>	✓
26	Adopted framework shapes plan + reads; snapshot pinning; one switch per cycle; 8-card stack	<code>personaPromptBlock</code> ; <code>personaSnapshot</code> ; <code>canAssignPersona</code> ; <code>personaDailyStack(..., 8)</code>	✓
27	13 relationship types incl. friend/family kept out of business coaching	<code>RELATIONSHIP_TYPES</code> ; persona crosswalk exclusions	✓
28	Tokens AES-GCM at rest; per-workspace row-level security; vaulted cron secret	<code>_crypto.ts</code> ; RLS on <code>crm_*</code> ; Supabase Vault <code>cron_secret</code>	✓