BUILDWITHHQ PRODUCT WALKTHROUGH

CustomerPortal

Customer Collaboration Portal

Build a customer-facing portal that sits beside your internal application—sharing selected conversations, files, requests, approvals, milestones, and updates while your team keeps private notes, workflows, and operational detail on the inside.

CUSTOMERPORTAL - WALKTHROUGH SCENARIO

A customer logs in, sees project status, uploads a missing document, approves a milestone, and sends a message while internal notes and sensitive fields remain private.

View evidence | Start workflow

1	6	5	4
GOVERNED PRODUCT MODEL	CORE CAPABILITIES	WALKTHROUGH STAGES	SEPARATED DATA / CODE PLANES

EXECUTIVE SUMMARY

What CustomerPortal is

CustomerPortal packages reusable BuildWithHQ primitives into a focused customer collaboration portal product experience.

01
Product layer
A branded application experience shaped around a specific operating job.

02
Governed intelligence
AI can analyze, retrieve, recommend, and prepare actions inside the same permission envelope as the application.

03
Operational actions
Workflows, approvals, APIs, webhooks, MCP tools, and custom services move from insight to controlled execution.

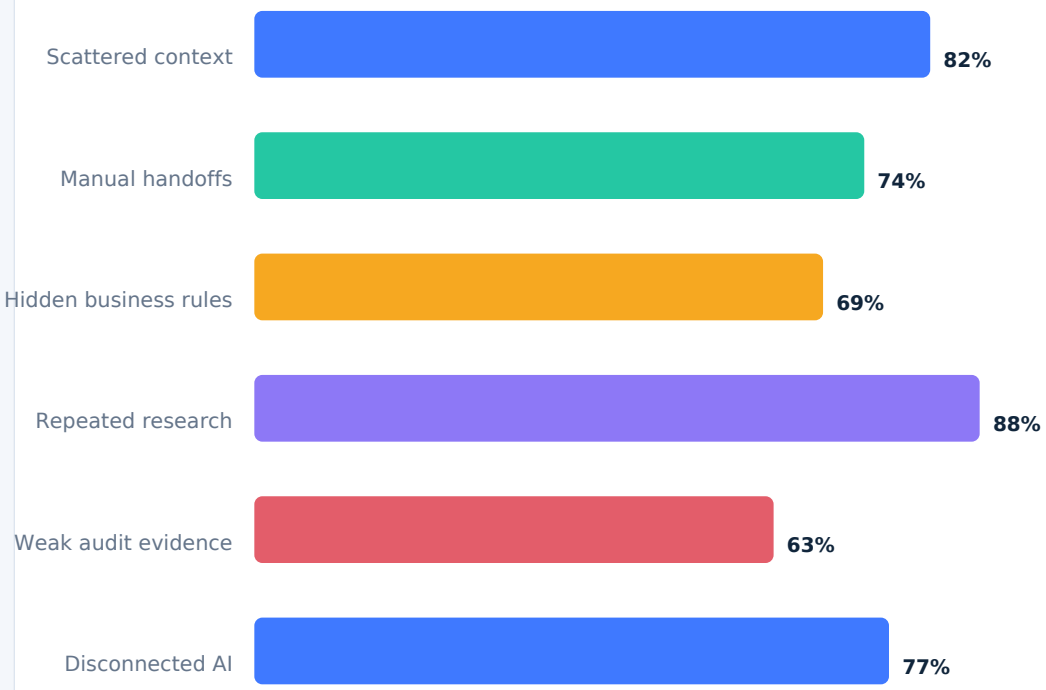
04
Platform leverage
Dedicated data planes, audit evidence, exports, and optional container services stay reusable under the product.

WHY THIS EXISTS

The operational problem

CustomerPortal is designed for work that becomes expensive when context, decisions, and actions are fragmented across tools and people.

Illustrative sources of operating friction



What changes

Instead of treating AI, records, workflows, permissions, and integrations as separate projects, the product keeps them inside one governed operating model.

Design goal

Reduce the distance between context, decision, and controlled action without flattening the business rules that make the workflow safe.

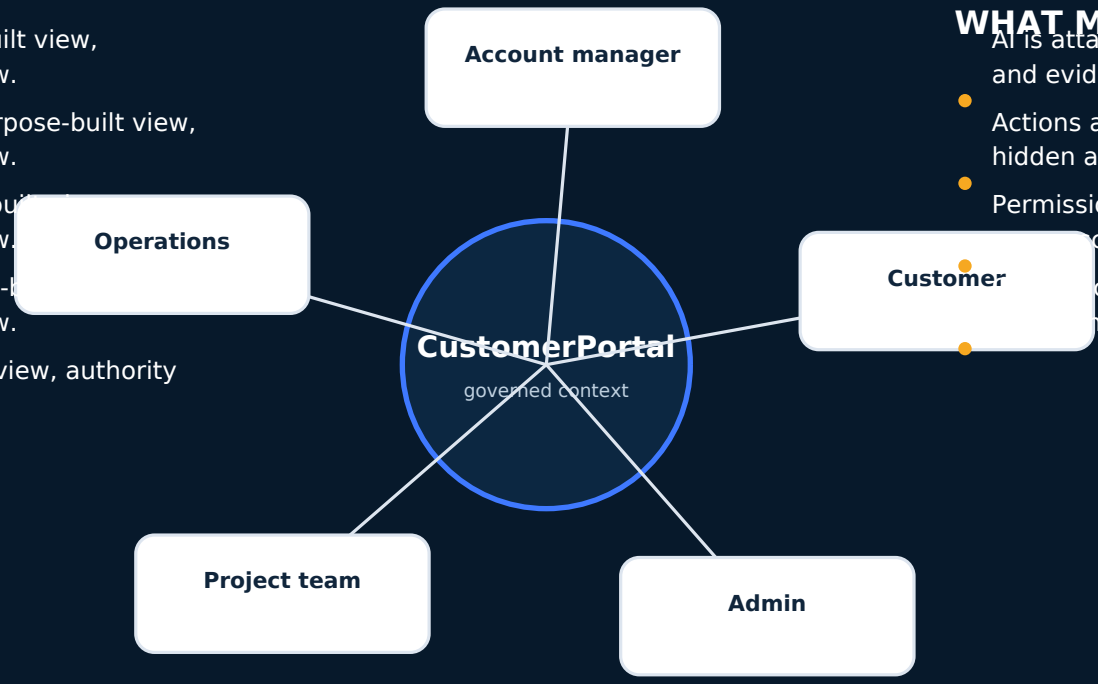
NOT JUST A FEATURE

A complete operating product

Give customers a shared workspace without exposing your internal one.

WHO IT SERVES

- Customer gets a purpose-built view, authority level, and workflow.
- Account manager gets a purpose-built view, authority level, and workflow.
- Operations gets a purpose-bu authority level, and workflow.
- Project team gets a purpose- authority level, and workflow.
- Admin gets a purpose-built view, authority level, and workflow.



WHAT MAKES IT DIFFERENT

- AI is attached to governed records and evidence.
- Actions are explicit contracts, not hidden autonomous behavior.
- Permissions remain server-side creens, APIs, AI and exports.
- code is optional - not the only atch.

CORE CAPABILITIES

The six building blocks of CustomerPortal

Build a customer-facing portal that sits beside your internal application—sharing selected conversations, files, requests, approvals, milestones, and updates while your team keeps private notes, workflows, and operational detail on the inside.

01
Customer-facing workspace

Create a branded portal with customer login, navigation, dashboards, requests, files, conversations, and status views.

02
Internal sidecar view

Give staff a richer internal view of the same customer relationship with private notes, assignments, workflows, AI guidance, and sensitive fields.

03
Shared vs. private data

Mark records, fields, comments, attachments, and events as customer-visible or internal-only with server-side permission enforcement.

04
Two-way communication

Keep requests, replies, file exchanges, approvals, status changes, and notifications connected to the same customer and internal records.

05
Customer actions

Let customers approve work, upload documents, complete forms, schedule meetings, acknowledge changes, or trigger defined workflows.

06
Brand + extend

Use your own branding and domain, then connect billing, identity, storage, support, or specialized services through APIs and the isolated container.

ARCHITECTURE

Separated by responsibility. One product to the user.

BuildWithHQ keeps runtime records, AI context, compliance evidence, and custom execution separate while the application presents one coherent experience.

1
Runtime Database
Users · product records · workflows · configuration

2
AI / Vector Database
Embeddings · knowledge · retrieval · AI configuration

3
Compliance Database
Reads · approvals · refusals · evidence · replay trail

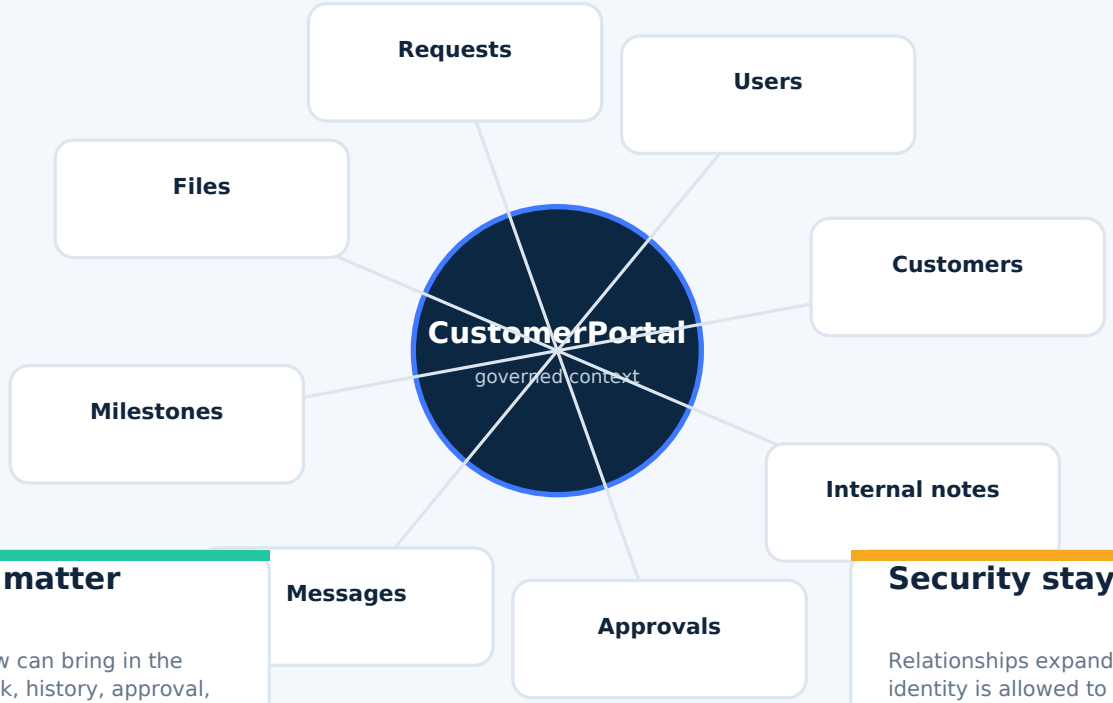
4
Isolated Code Container
Custom APIs · SDKs · private logic · background services

Unified permissions, actions, APIs, exports, and audit boundaries across the product

DATA MODEL

Everything important becomes connected context

The product data model is not a set of isolated modules. Records can relate recursively so users and AI can traverse the real operating context.



Why relationships matter

A recommendation or workflow can bring in the right customer, document, task, history, approval, or related object without forcing the user to manually reconstruct context.

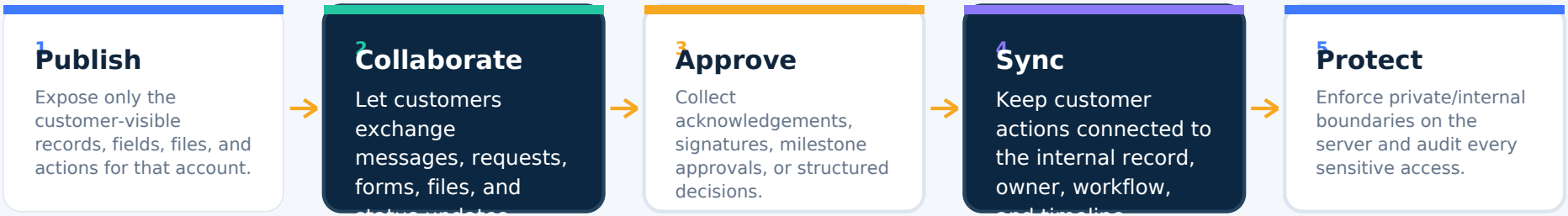
Security stays attached

Relationships expand context only when the current identity is allowed to traverse the connected record and field. More context does not mean broader access.

WALKTHROUGH

From input to governed outcome

A customer logs in, sees project status, uploads a missing document, approves a milestone, and sends a message while internal notes and sensitive fields remain private.



The five stages are illustrative - each BuildWithHQ implementation can add branches, approvals, retries, SLAs, external systems, and custom services.

WALKTHROUGH 1/5

1. Publish

Expose only the customer-visible records, fields, files, and actions for that account.

INPUT

What enters this stage

Identity, permitted records, related context, workflow state, and any source-specific inputs required for publish.

EVIDENCE

Evidence produced

Store the records consulted, source versions, relevant model output, workflow transition, approvals/denials, and mutation result so the operation can be explained later.

ENGINE

What BuildWithHQ does

Expose only the customer-visible records, fields, files, and actions for that account. The runtime enforces tenant, role, record, field, rate-limit, and action boundaries before the stage can progress.

EXPERIENCE

What the user sees

A focused CustomerPortal screen should expose the result, why it happened, what remains unresolved, and the next safe action - without forcing the user to inspect raw infrastructure.

WALKTHROUGH 2/5

2. Collaborate

Let customers exchange messages, requests, forms, files, and status updates.

INPUT

What enters this stage

Identity, permitted records, related context, workflow state, and any source-specific inputs required for collaborate.

EVIDENCE

Evidence produced

Store the records consulted, source versions, relevant model output, workflow transition, approvals/denials, and mutation result so the operation can be explained later.

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What BuildWithHQ does

Let customers exchange messages, requests, forms, files, and status updates. The runtime enforces tenant, role, record, field, rate-limit, and action boundaries before the stage can progress.

EXPERIENCE

What the user sees

A focused CustomerPortal screen should expose the result, why it happened, what remains unresolved, and the next safe action - without forcing the user to inspect raw infrastructure.

WALKTHROUGH 3/5

3. Approve

Collect acknowledgements, signatures, milestone approvals, or structured decisions.

INPUT

What enters this stage

Identity, permitted records, related context, workflow state, and any source-specific inputs required for approve.

EVIDENCE

Evidence produced

Store the records consulted, source versions, relevant model output, workflow transition, approvals/denials, and mutation result so the operation can be explained later.

ENGINE

What BuildWithHQ does

Collect acknowledgements, signatures, milestone approvals, or structured decisions. The runtime enforces tenant, role, record, field, rate-limit, and action boundaries before the stage can progress.

EXPERIENCE

What the user sees

A focused CustomerPortal screen should expose the result, why it happened, what remains unresolved, and the next safe action - without forcing the user to inspect raw infrastructure.

WALKTHROUGH 4/5

4. Sync

Keep customer actions connected to the internal record, owner, workflow, and timeline.

INPUT

What enters this stage

Identity, permitted records, related context, workflow state, and any source-specific inputs required for sync.

EVIDENCE

Evidence produced

Store the records consulted, source versions, relevant model output, workflow transition, approvals/denials, and mutation result so the operation can be explained later.

ENGINE

What BuildWithHQ does

Keep customer actions connected to the internal record, owner, workflow, and timeline. The runtime enforces tenant, role, record, field, rate-limit, and action boundaries before the stage can progress.

EXPERIENCE

What the user sees

A focused CustomerPortal screen should expose the result, why it happened, what remains unresolved, and the next safe action - without forcing the user to inspect raw infrastructure.

WALKTHROUGH 5/5

5. Protect

Enforce private/internal boundaries on the server and audit every sensitive access.

INPUT

What enters this stage

Identity, permitted records, related context, workflow state, and any source-specific inputs required for protect.

EVIDENCE

Evidence produced

Store the records consulted, source versions, relevant model output, workflow transition, approvals/denials, and mutation result so the operation can be explained later.

ENGINE

What BuildWithHQ does

Enforce private/internal boundaries on the server and audit every sensitive access. The runtime enforces tenant, role, record, field, rate-limit, and action boundaries before the stage can progress.

EXPERIENCE

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A focused CustomerPortal screen should expose the result, why it happened, what remains unresolved, and the next safe action - without forcing the user to inspect raw infrastructure.

GOVERNANCE

Permissions follow the user into AI, APIs and actions

One authorization model should determine what each role can read, retrieve, export, approve, or mutate.

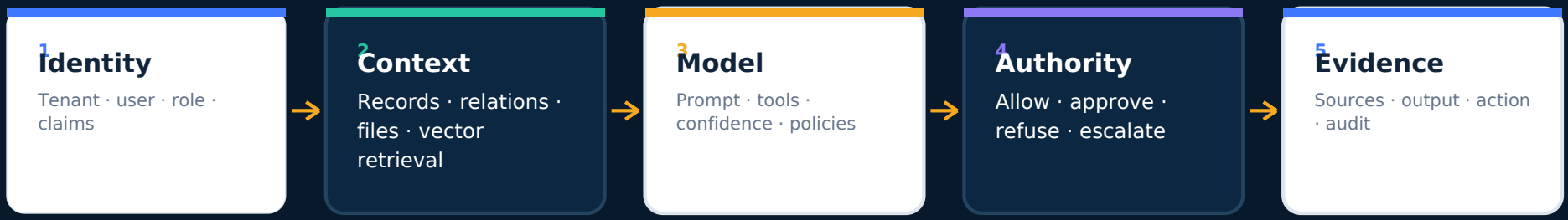
Illustrative authority matrix - 1 restricted to 5 broad

	Read	AI context	Recommend	Approve	Execute
Customer	5	4	2	5	1
Account manager	5	4	4	5	4
Operations	5	4	4	2	4
Project team	5	4	4	2	1
Admin	5	3	2	5	1

AI OPERATING MODEL

AI is a participant in the workflow - not a bypass arou

The AI layer can retrieve, synthesize, rank, draft, and recommend. Server-side policies still decide what data and actions are actually available.

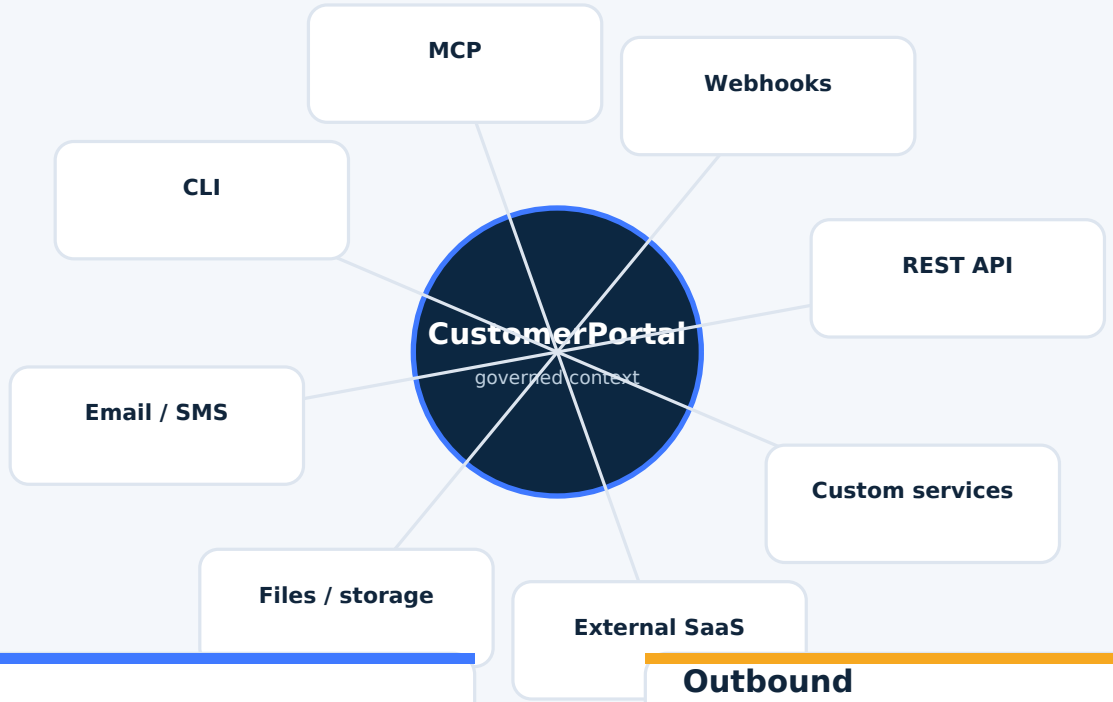


This pattern lets the same intelligence layer support employees, end customers, scheduled agents, MCP clients, and API-driven experiences.

INTEGRATION SURFACE

Connect to the systems already around the business

API, webhooks, MCP, CLI, file import/export, and optional private services let the product fit into an existing stack instead of becoming another isolated island.



Inbound

Events, imports, messages, usage data, customer records, documents, signals, or other domain-specific inputs.

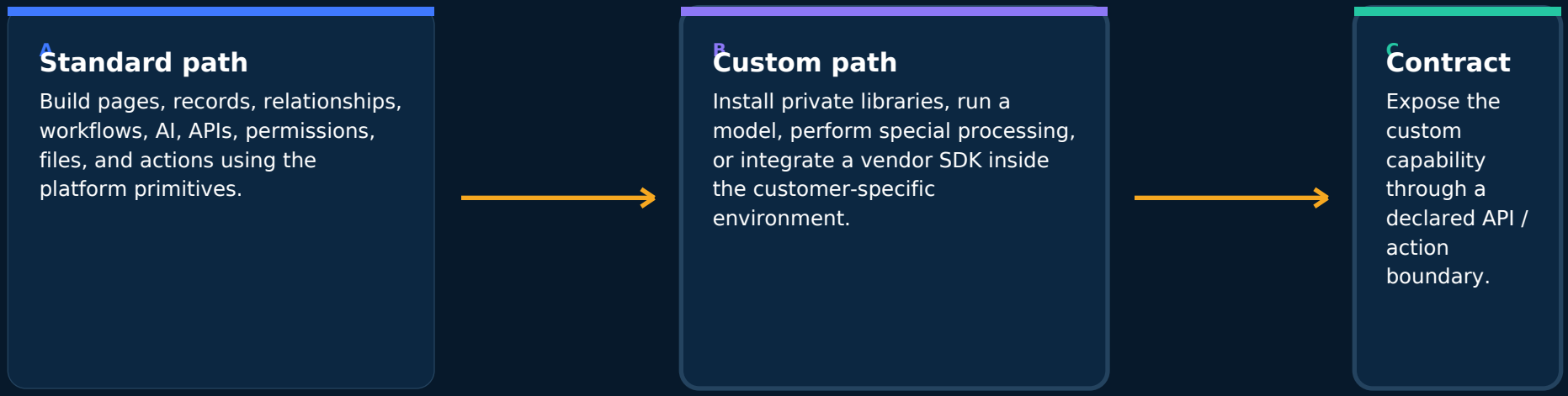
Outbound

Actions, notifications, record updates, webhooks, exports, generated files, MCP tools, or custom API calls.

ESCAPE HATCH

Optional isolated container when the product needs

Most of the application can remain schema-, workflow-, and API-driven. When a developer needs a special SDK, proprietary algorithm, or long-running service, the isolated container provides a controlled extension point.

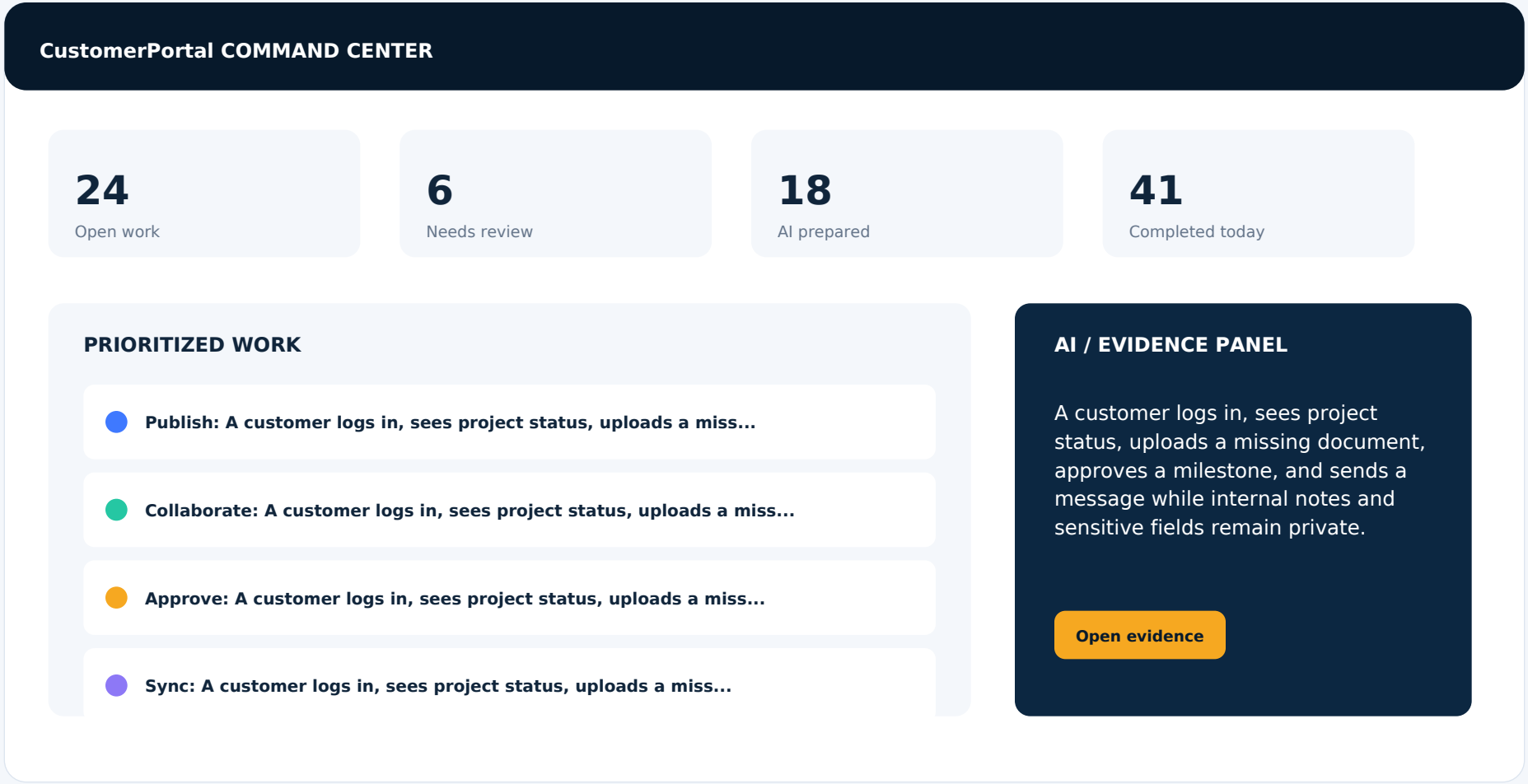


The central execution layer can call the declared service while the custom code remains isolated from the core platform and from other customers.

PRODUCT EXPERIENCE

What a CustomerPortal operating screen can look lik

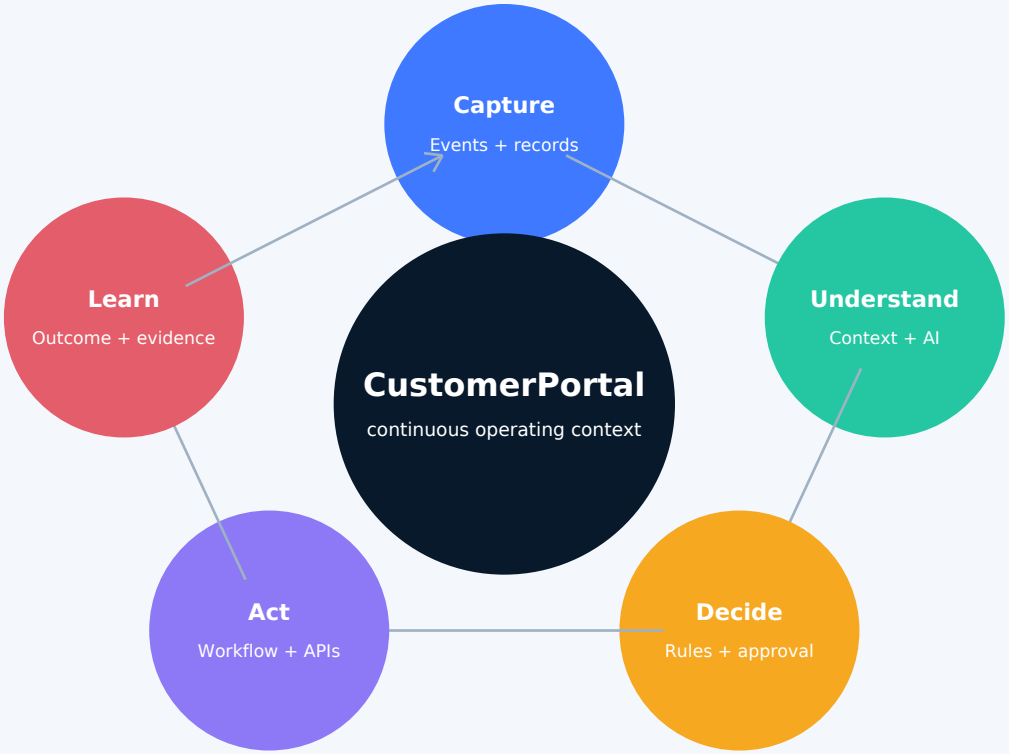
The point of the blueprint is to turn deep infrastructure into a focused daily workflow.



OPERATING FLYWHEEL

Every completed cycle can improve the next one

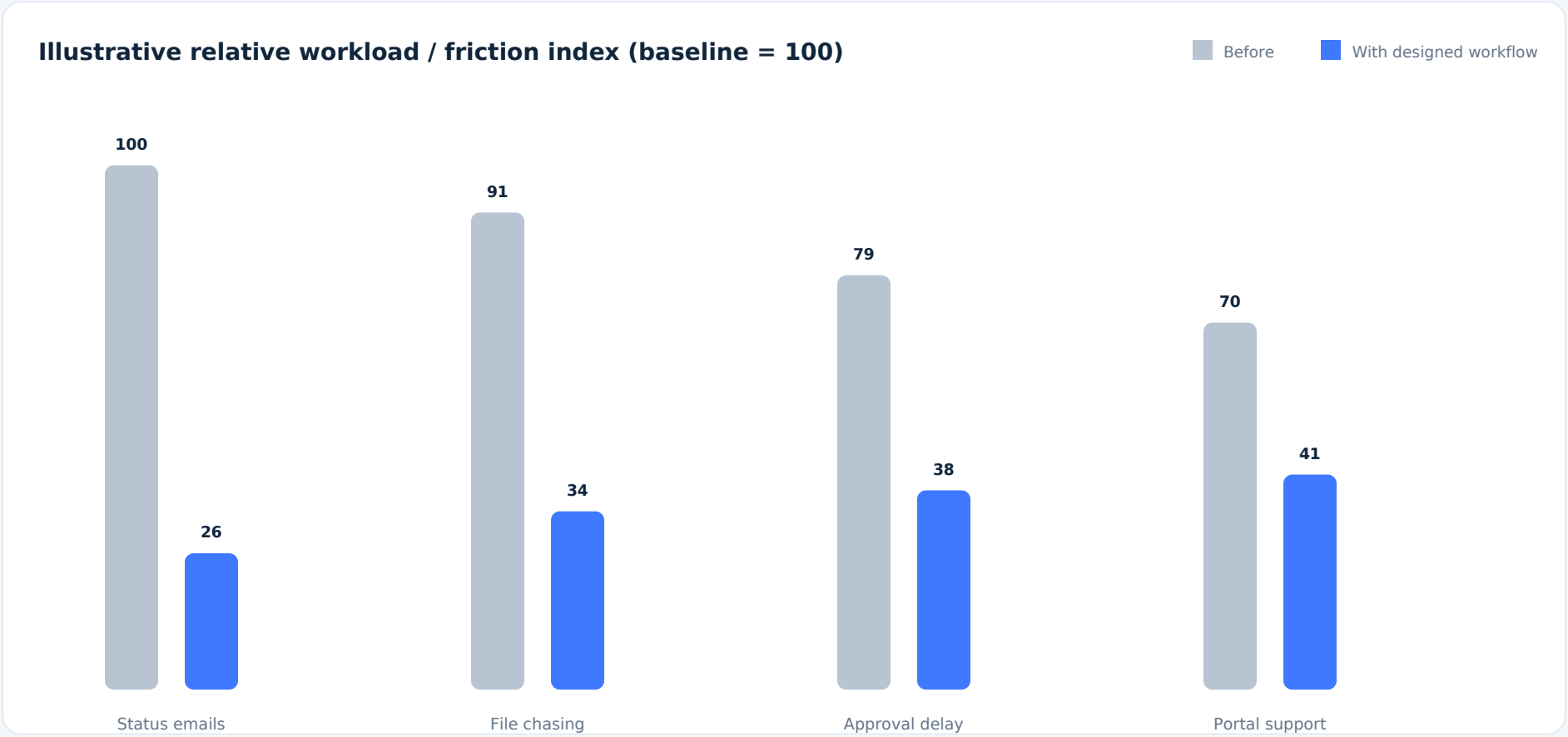
The product gets stronger when outcomes, approvals, exceptions, source quality, user corrections, and workflow performance are fed back into the operating model.



ILLUSTRATIVE IMPACT

Where operating leverage can show up

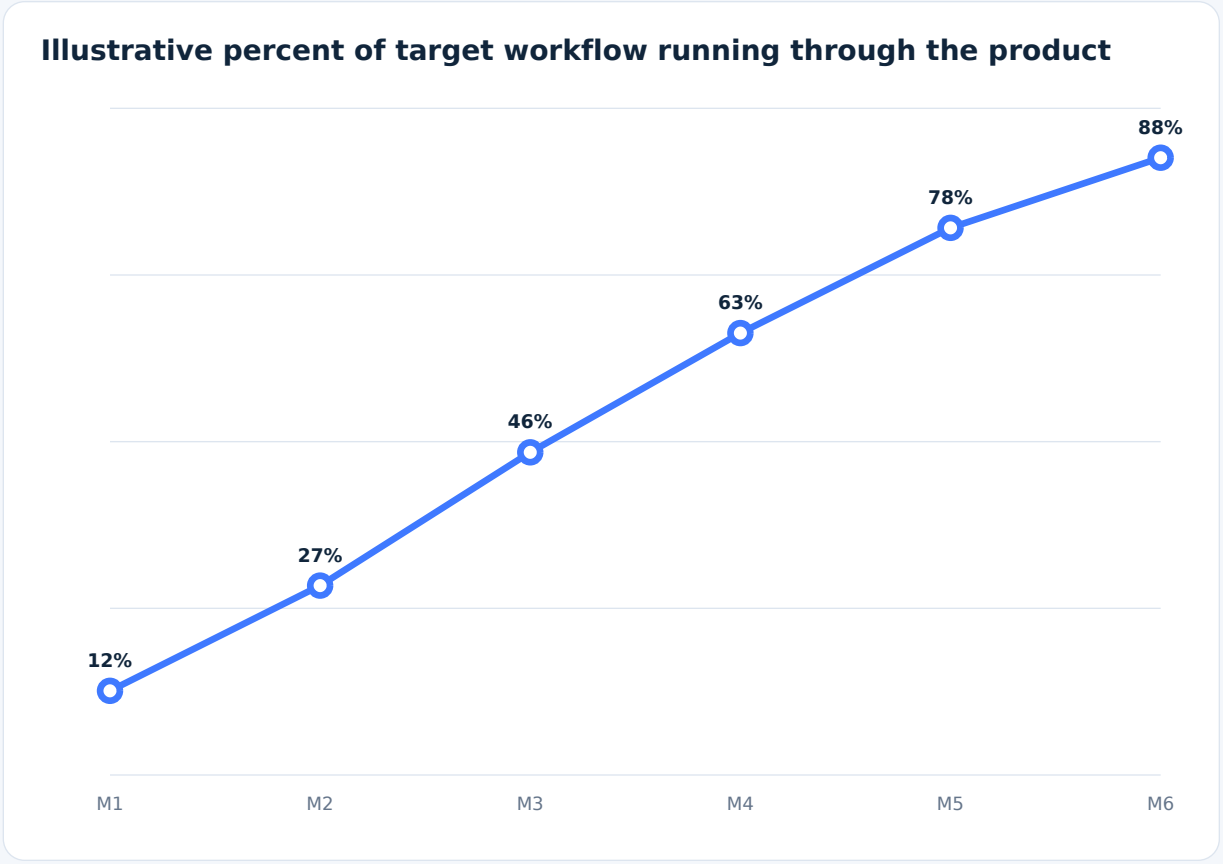
The numbers below are not measured BuildWithHQ customer results. They are an illustrative model showing the kinds of friction the product is designed to reduce.



ILLUSTRATIVE ROLLOUT

Value compounds as more work enters the governed

A staged deployment lets the team prove retrieval, routing, approvals, and actions before widening automation authority.



Phase 1 - Assist

Read-only context, search, summaries, classification, and drafts. Human users make every consequential decision.

Phase 2 - Governed action

Add explicit tools, approval thresholds, scheduled runs, and carefully bounded auto-actions where the evidence is strong.

PRODUCT DIRECTIONS

Six ways to package CustomerPortal

One BuildWithHQ blueprint can be narrowed to a vertical, customer segment, operating team, or recurring workflow and then branded as its own SaaS product.

01
Client onboarding portal
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

02
Project collaboration
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

03
Vendor portal
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

04
Member portal
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

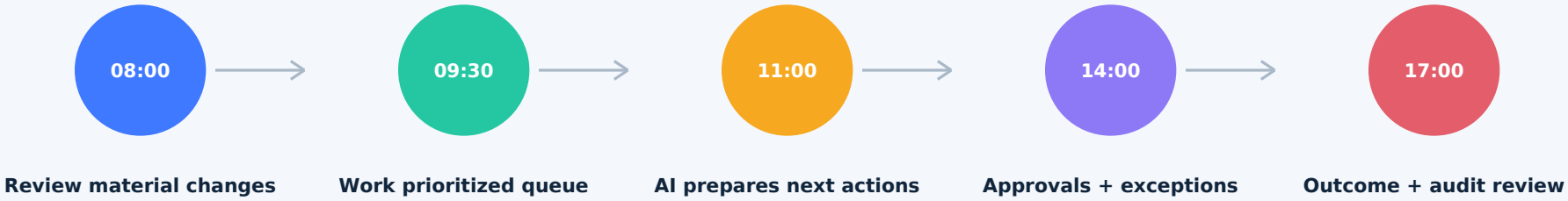
05
Partner workspace
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

06
Secure document exchange
Use the same core CustomerPortal architecture, then customize terminology, records, permissions, integrations, AI behavior, and workflows for this market.

DAILY OPERATION

A role-aware experience from morning to close

Different users can work on the same underlying records while seeing different queues, context, evidence, and action rights.



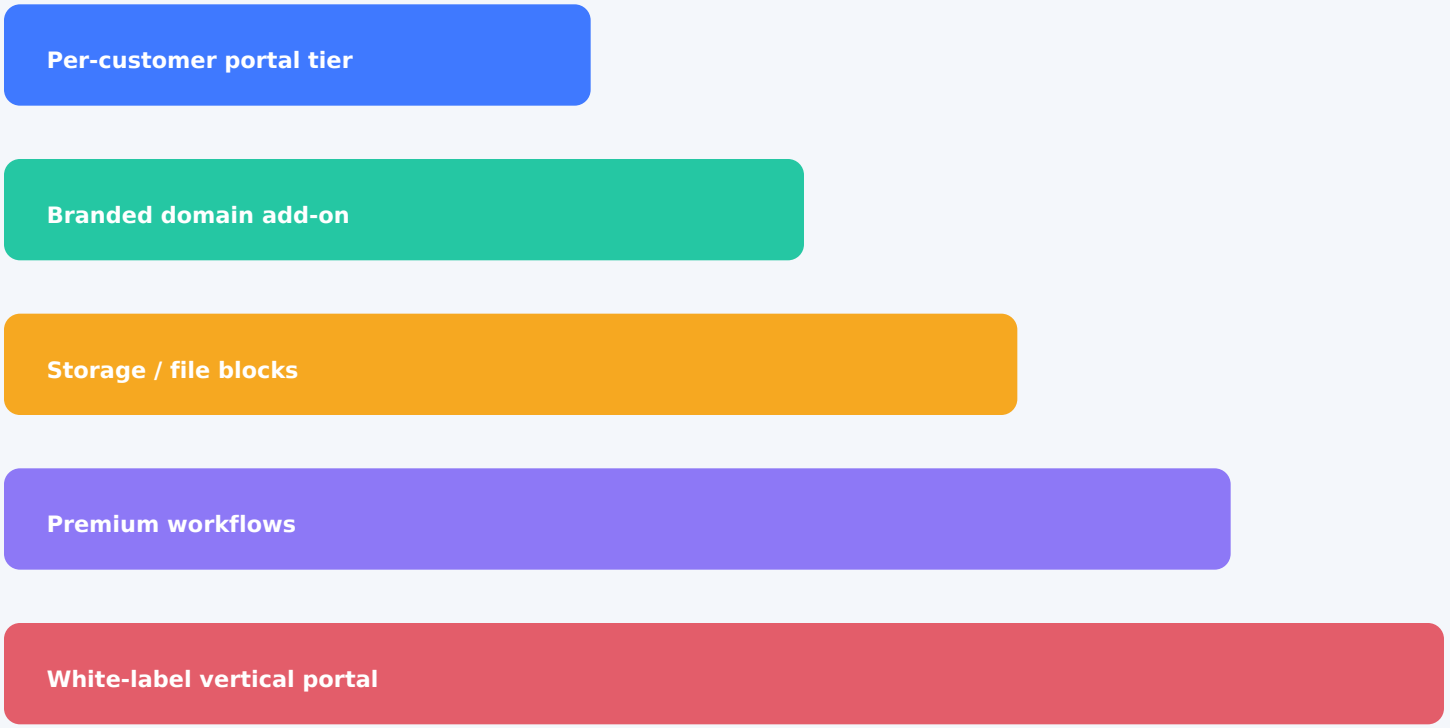
The important part

The application is not forcing every role into the same dashboard. The runtime can expose the same record with different fields, related context, actions, AI tools, and approval rights based on who is looking at it.

COMMERCIAL MODEL

Ways a builder could monetize the product

These are product packaging ideas, not fixed BuildWithHQ pricing. A builder can mix software subscriptions, usage, premium modules, infrastructure, and services.



Illustrative packaging ladder: start simple, then monetize the capabilities that scale with customer value or infrastructure consumption.

IMPLEMENTATION ROADMAP

A practical 90-day build sequence

The exact timeline depends on scope, but the safest pattern is to establish data + identity first, then intelligence, then actions, then expansion.

0-30

Foundation

Data model, identity, permissions, core screens, imports.

31-45

Context

Relationships, files, search, vector retrieval, evidence.

46-60

Workflow

Queues, SLAs, rules, approvals, notifications.

61-75

AI + MCP

Assistance, agents, MCP tools, bounded action contracts.

76-90

Production

Observability, exports, load tests, runbooks, launch controls.

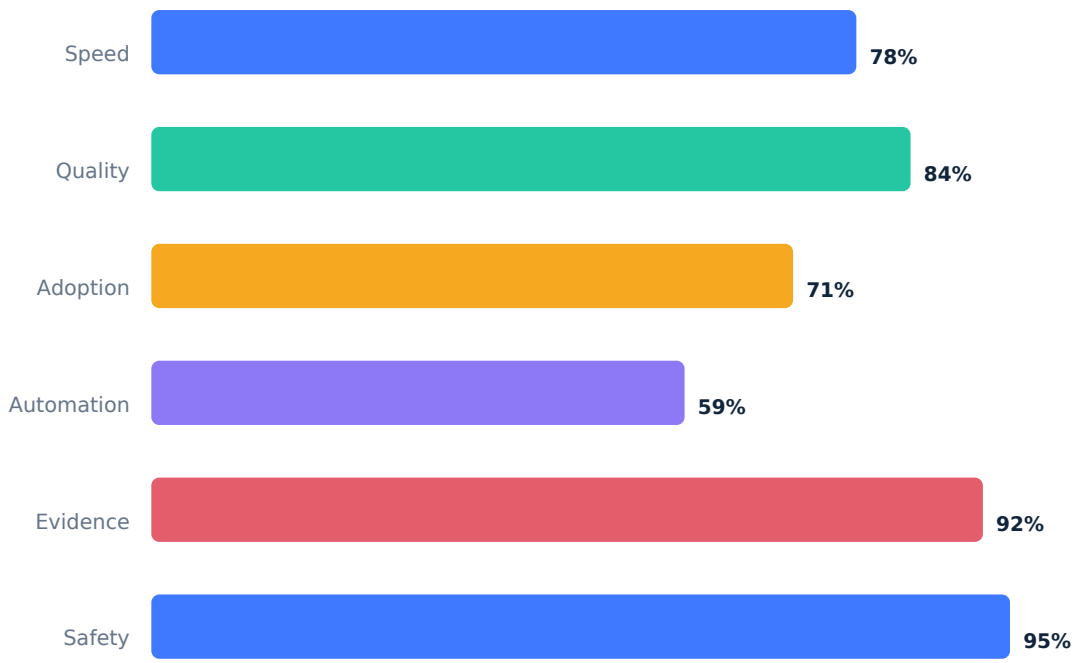
Launch authority should expand only after the evidence trail, failure handling, permission checks, and rollback path are tested.

MEASUREMENT

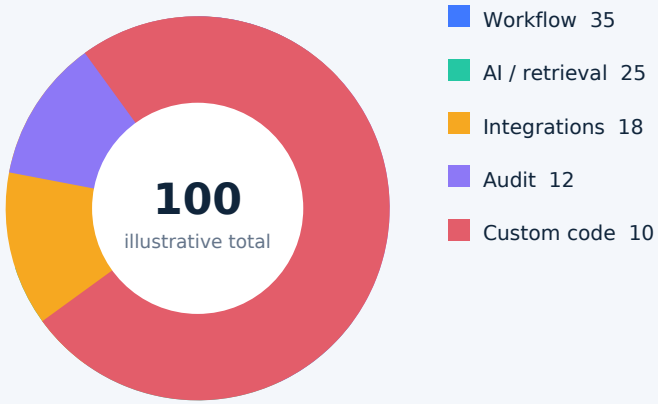
What to measure after launch

The product should be evaluated on operating outcomes, not just model usage. Track speed, quality, safety, adoption, and economic leverage together.

Illustrative maturity scorecard



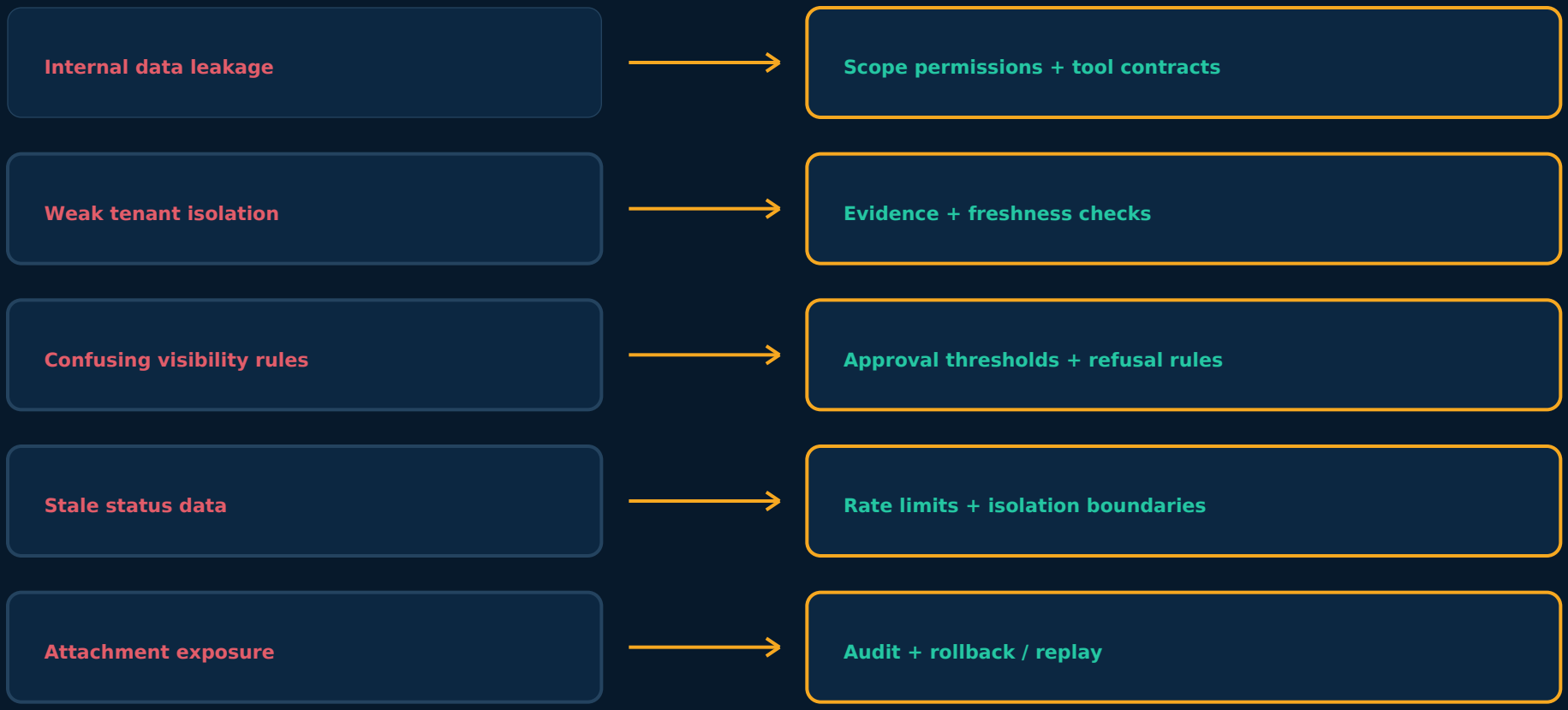
Illustrative implementation effort mix



RISK + CONTROL DESIGN

Make the dangerous path harder than the safe path

The goal is not to promise that AI or automation cannot fail. The goal is to constrain what failure can affect, surface evidence, and preserve a deterministic way to stop or reverse the operation.



DEVELOPER SURFACES

One backend, multiple ways to use it

The same product can support a visual SaaS interface, an external frontend, internal automation, developer tooling, and agent access without creating five disconnected permission models.

1
UI
Built-in product pages

2
REST
External apps + integrations

3
MCP
AI clients + agent tools

4
CLI
Developers + operations

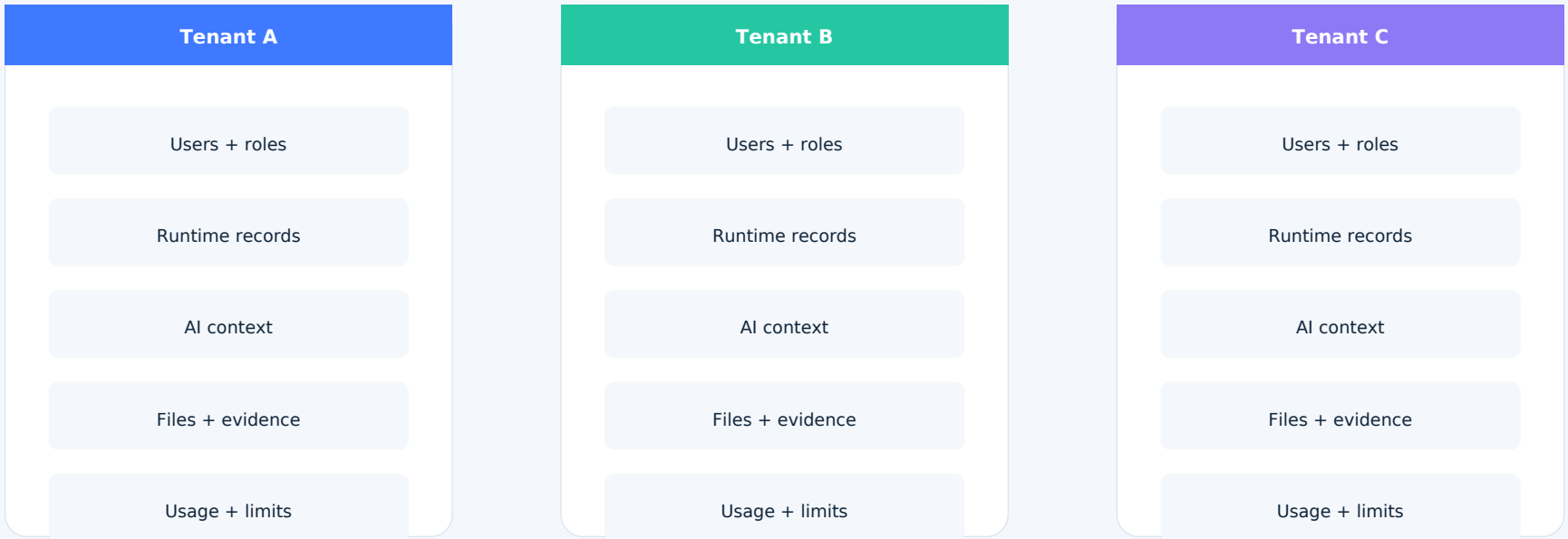
5
Webhooks
Event-driven systems

6
Export
Portability + reporting

SAAS OPERATIONS

Productize once. Isolate customers by design.

BuildWithHQ is intended to let a builder define the product experience while tenant, user, permission, data, AI, and optional service boundaries keep each customer context separated.



Shared platform primitives - isolated customer context - configurable product experience

BUILD THIS

Start with CustomerPortal. Make it yours.

CustomerPortal is a product direction, not a fixed template. Use the blueprint as a starting architecture, then shape the records, screens, AI behavior, integrations, permissions, workflows, container services, and commercial model around your market.

01
1. Define the job
Choose the recurring operating problem and the user roles that feel it most.

02
2. Map the system
Define records, relationships, evidence, permissions, workflows, and required integrations.

03
3. Add intelligence
Layer AI and agents into the governed operating loop instead of around it.

ldWithHQ turns reusable platform primitives into products you can brand, extend, and s

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