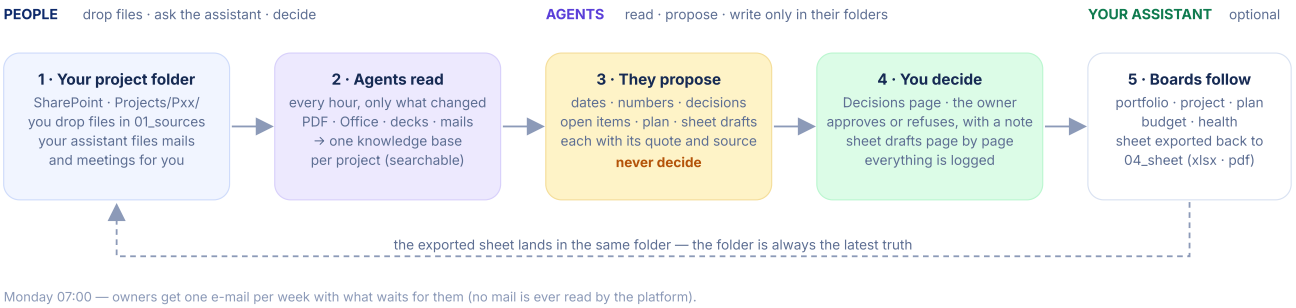
How Smart Products Control works

One place for the 21 smart-product projects of Doona, Filo and babyark: where each one stands, the next gate, the decisions waiting for someone. Files stay in the project folder on SharePoint; agents read them and **propose**; people decide; the boards and the product sheet follow.

The loop — one picture



Monday 07:00 — owners get one e-mail per week with what waits for them (no mail is ever read by the platform).

Who does what

everyone in the Doona · Filo tenant can sign in; roles are given by the administrator

Role	Who	Can
Viewer	everyone in the tenant, by default	see every project, board and document link · ask the assistant · connect their own assistant, read-only · ask for a role
Owner	Hadar and the people named per project	see every project, board and document link · ask the assistant · connect their own assistant (read · propose · ingest) · decide on their projects: approve / refuse proposals, accept sheet pages · launch Studio agents (“Complete the sheet”, “Review the budget”…) · name the project, choose its photo, apply the assistant’s changes · Monday e-mail with what waits
Executive	Shy — the power user	see every project, board and document link · ask the assistant · connect their own assistant (read · propose · ingest) · everything an owner can, on every project · add a project · Monday portfolio digest
Admin	Giorgio	see every project, board and document link · ask the assistant · connect their own assistant (read · propose · ingest) · everything an executive can · roles and projects per person · agents, prompts, runs, connections · the invitation mail

The five places

everything is at most two clicks away

Portfolio	all projects as cards, table, by quarter or Gantt · health is always icon + label (✓ On track · ▲ At risk · ✕ Off track · ◷ Stale) · filters: mine, needs attention, owner

Project	Overview · Plan & control (the shared plan: versions, drawer, dependencies, exports) · Budget & team · Documents · Decisions
Decisions	what waits for a person: proposals with quote and source, sheet drafts, open decisions; approve / refuse
Assistant	bottom-right on every page: ask anything about a project, it answers with the documents it read and can propose a change you apply
My connector	avatar menu: a token or an OAuth sign-in so Claude / Cursor / ChatGPT read the platform for you

Board · Operations

the pill in the top bar — your choice is remembered

Board reads the portfolio in ten seconds: the map of phases × urgency, the control map of a project, the plan as gates and critical activities. **Operations** has everything underneath: every task, file, proposal and the plan editor. Board hides detail, never a different truth — every Board number opens the Operations page it comes from. Executives start in Board, everyone else in Operations; switch any time.

The shared plan

Plan & control · owners of the project, executives, admins

Edit plan opens one shared draft for the project; everyone on it sees the same rows and who is editing which one. Changes save as you type and reach the others within a second; when two of you touch the same row, your version is kept and the row is marked so you can check it. **Publish** makes a new version — the file goes to `03_plan` on SharePoint first, then every page follows. **Discard** returns everyone to the published plan. Plans arriving from files or agents wait as proposals under **Versions & proposals**.

What changed

the bell next to the pulse

Pages refresh by themselves when something changes on your projects. Approvals, decisions, published plans, updates and uploads by other people appear as a short notice and in the bell; opening the bell marks them read. The footer says how you are connected (*Live*, or checked every 20 s when the connection drops — nothing is lost either way).

Ten-minute start

1

Sign in

→ Sign in with Microsoft, your usual work account. Nothing to install, no new password.

everyone

2

Open your project

Portfolio → the card. Check the head: name, phase, next gate, four figures. Anything wrong? Owners fix it in place or ask the assistant to propose the correction.

everyone

3

Decide what waits

Decisions → your projects. Each proposal shows the quote and the document. Approve, refuse, or refuse with a note. Sheet drafts are accepted page by page.

owners

4

Keep the folder alive

Drop what you receive in 01_sources (any name, any sub-folder — in English). Within an hour the agents have read it. Optional: connect your assistant so your mail does it for you.

owners · teams

Questions people ask

Can an agent change a date or a number by itself?
No. Everything an agent or an assistant produces is a proposal. It becomes real only when an owner approves it on Decisions, and the approval is logged with name and time.

Does the platform read my mailbox?
No. If you want your mail and meetings to feed a project, your own assistant does it through your own Outlook / Fathom connector, next to the platform connector — and still only proposes.

Where is the truth, the platform or the folder?
The folder. What you put in 01_sources and the sheet in 04_sheet are the record; the platform reads them and writes the exports back there.

What does “Stale” mean?
No human update for more than 14 days on a project with a gate ahead. It is a nudge, not a judgement — one approved proposal or one update clears it.

I see everything but every button is off.
You are a viewer. Ask for the owner role from Getting started (avatar menu) — the administrator gets a mail and grants it; it is active within 5 minutes.

Something looks wrong and I am not the owner.
Tell the assistant (“the launch target of P07 is Q2, not Q1 — source: …”). It files a proposal for the owner with your name.

Your project folder on SharePoint

One folder per project, the same for all 21

```
Documenti/Projects/P07_Smart_Wheel_Hub/
  00_STATUS.md          ← agents write the status (approved text only)
  INDEX.md              ← agents keep the listing up to date
  01_sources/           ← YOU drop here — any name, any sub-folder, never touched
     quotes/  renders/  test-reports/  …
     _inbox_*/  _extracts/   ← what assistants file for you · text the agents read
  02_research/          ← agents: market, competitors, SWOT, pricing
  03_plan/              ← agents: activities, budget, Gantt
  04_sheet/             ← the product sheet: Pxx_…_vX.Y.xlsx · .pdf · brief
                            (a .json you save here is imported as the current sheet)
  05_reviews/           ← agents: reviewer reports
  img/                  ← YOU: photos, renders, references (the cover is chosen here)
  _superseded/          ← previous versions, never deleted
```

you write · agents write · system, never delete

Rule for people: put the file in the project, anywhere under **01_sources** or **img**. Naming is free — but **folder and file names always in English** (one language for everyone and for the agents). The agents classify by content and date. Nothing else is required.

read

Get into the folders

The project folders are on the SharePoint site **Smart Products**. Everyone in the company can **read** them. To **drop files** you need edit access: ask here, the administrator adds you to the site members — usually the same day.

Have it on your computer

sync, don't download

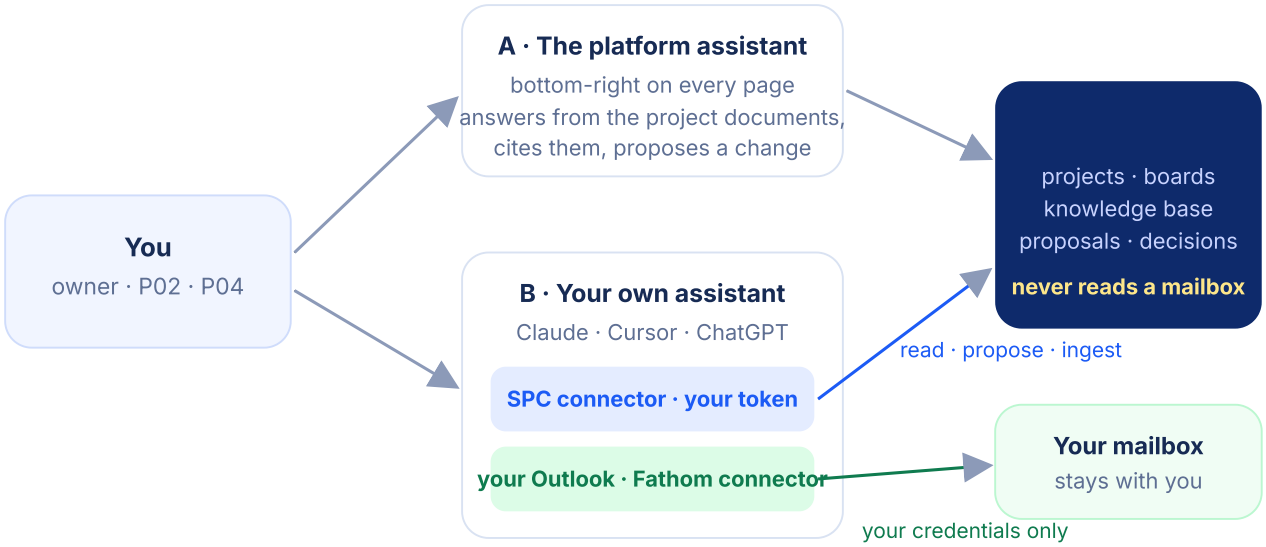
1. Open the site → library **Documenti** → **Sync** (or **Add shortcut to OneDrive**).
2. It appears in Finder / Explorer as **Smart Products – Documenti**; works offline, syncs back.
3. Drop files there as you would in any folder. Files-on-demand keeps big decks in the cloud until opened.

What happens after you drop a file



Your assistant and the platform

Two assistants, one rule: they propose, you decide



A needs nothing. B takes five minutes on **My connector**; viewers get read-only. Everything either one sends is a proposal signed with your name and visible in Decisions.

Things to ask

same questions work in A and in B

- “Where does the **Mini Mobile** stand and what is the next gate?”
- “What did the supplier quote for the tooling, and when?” — answer with the PDF and the page
- “The MSRP target is 149 $, not 129 $ — source: pricing deck of 3 Oct” → a proposal, you approve
- B only: “File this Fathom meeting on P04 and tell me what changed” · “What came in on the Rocker this week?”

What a proposal looks like

number **COGS today** · P04 Smart Stroller Toy — by Hadar’s assistant · 2 h ago

before 41.0 $ → after **38.2 $**

“Unit price at 10k pcs: USD 38.20 FOB Shenzhen” — **Kinmore_Q3_2026.pdf · p. 2 ↗**

Approve | Refuse | Refuse with note

Always: what · before / after · the quote · the document · who proposed · your decision, logged.

Set up B

1. Avatar → **My connector** → Create token (or “Connect with Microsoft” for ChatGPT / Claude.ai).
2. Paste the block in your client (tabs for Claude Desktop · Claude Code · Cursor · ChatGPT).
3. Ask “List the smart-product projects” — the page turns green on the first call.
4. Optional: add your Outlook / Fathom connector and the **smart-products-inbox** skill.