Whatts Law Discord Bot Operations Manual

Virtual Receptionist and Technical Support Assistant

This manual explains how the two independent Whatts Law Discord applications support the website and D1 records under Rick's current governance direction. The website and D1 database remain authoritative. Discord roles, commands, titles, investment, labor, relationships, or technical permissions never create equity.

Governance states

Pre effective state

Rick Whatts owns 100% of Whatts Law and exercises present Owner authority. Harmony Cole may serve as Technical Systems Administrator, but technical access does not create equity or Owner authority. The system must not present the future partnership as active.

Active 50 50 state

The intended post-transition state activates only on the later of execution of the Ownership & Partnership Agreement by Rick and Harmony and Harmony's documented formal transition to Whatts Law. Rick then serves as Founder and Managing Partner with 50% equity, and Harmony serves as Founding Partner with 50% equity. Rick directs ordinary management and controls ordinary-management disagreements. Matters reserved for joint Owner action still require joint action.

Virtual Receptionist

The Virtual Receptionist collects guided requests, creates private workspaces, publishes approved notices, and mirrors sanitized status. It does not give legal advice, perform conflict checks, accept representation, set custom fees, or replace the authoritative matter record.

Command or surface	Purpose	Authority
/governance status	Privately display the authoritative governance state and recorded dates.	Authorized staff
/governance activate	Record a completed transition and synchronize Harmony's website and Discord roles.	Current Owner only; guarded
/counsel-help	Display the current private command guide.	Authorized staff
/claim	Convert an unclaimed legal intake into a matter.	Authorized intake staff
/firm and /lead	Convert an intake with a selected lead or transfer matter leadership.	Authorized legal management
/firm-matter	Create a linked private legal-team discussion.	Assigned matter staff
/paralegal	Request or coordinate scoped paralegal support.	Assigned matter staff
/mentorship	Create a private counsel and assigned-	Attorney-level matter staff

	paralegal thread; refuse when no paralegal is assigned.	
/pi assignment	Create a private counsel and assigned-investigator thread; refuse when no investigator is assigned.	Attorney-level matter staff
/leadership	Create a private Rick and Harmony discussion.	Governance workflow
/alert-counsel	Send a private My Eyes Only counsel alert.	Authorized legal staff
/case-links	List linked matter, service, and mediation rooms.	Assigned matter staff
/print	Create or refresh a durable printable document notice.	Authorized matter staff
/qr	Refresh the saved printable notice and QR attachment in place.	Authorized matter staff
/close reason:	Verify staff authority, capture the Discord transcript to private Whatts Law storage, verify it with a SHA-256 receipt, lock the archived channel read-only, then update the authoritative record and queue without creating duplicate closure records.	Authorized workflow participant
/add and /remove	Manage scoped matter participants.	Authorized matter management
/process server	Create and administer Process Service packets.	Authorized Process Service staff
/mediation	Create and administer mediation rooms.	Authorized mediation staff
/staffing request	Request assignment support.	Authorized matter staff
/staffing assign	Assign personnel and approved case pay.	Current Owner; either Owner after activation
/hr applicant	Record an applicant decision.	Current Owner; either Owner after activation
/help	Open a private technical-support ticket.	Available command users

Guarded governance activation

- Use activation only after both parties execute the ownership agreement and Harmony formally transitions to Whatts Law.
- The command requires the execution date, transition date, Harmony's Discord account, and an explicit confirmation.
- The later recorded date becomes the effective date.
- D1 appends governance history and audit records; earlier records are not deleted or rewritten.

- Harmony's website identity becomes Founding Partner with Owner authority, and Discord receives Owner and Founding Partner roles while Technical Support duties may remain.
- If external Discord synchronization fails after D1 activation, the bot reports a reconciliation condition instead of hiding the authoritative D1 state.

Technical Support Assistant

The Technical Support Assistant manages configuration health, integration status, technical audits, and private support routing. It does not decide representation, fees, attorney assignments, discipline, ownership, succession, or other legal-management matters.

Command or surface	Purpose	Authority
/help	Open a guided private support ticket under Harmony's technical workspace.	Any permitted requester
/governance status	Read the D1 governance state without changing it.	Authorized staff
/governance activate	Apply a completed transition across D1, website identity, and Discord roles.	Current Owner only; guarded
Discord setup endpoint	Create or reconcile managed roles, categories, channels, and commands idempotently.	Internal setup secret
Runtime sync endpoint	Refresh durable guides, calendars, and notices in place.	Internal setup secret
Website governance endpoint	Return the current governance summary to a signed-in user.	Authenticated website user
Website activation endpoint	Record a completed transition through Administration.	Current Owner only; guarded
Firm Admin preview	View the exact website shown to an employee or client while preserving the acting administrator in audit history.	Rick and Harmony Technical Support
Employee role assignment	Update website position, revoke sessions, append audit history, and synchronize linked Discord roles.	Rick or active Owner

Website and Discord role alignment

Command or surface	Purpose	Authority
Technical Systems Administrator	Firmwide troubleshooting, every intake and matter, Firm Admin preview, and system administration.	Discord Technical Support
Non Equity Partner	Non-owner attorney management below the Owners.	Discord Non-Equity Partner
Principal Attorney	Senior attorney leadership within the attorney chain.	Discord Principal Attorney

Senior Associate	Senior assigned legal work without firmwide ownership authority.	Discord Senior Associate
Associate Attorney	Assigned legal work and authorized intake review.	Discord Associate Attorney
Paralegal	Assigned matters and delegated intake work only.	Discord Paralegal
Private Investigator	Assigned investigations only.	Discord Private Investigator
Civil Process Server	Assigned service packets only.	Discord Civil Process Server

Durable messages and data boundaries

- Client Agreement, Process Service, mediation, and document notices use one saved message per agreement, packet, room, or document.
- Synchronization and QR refresh edit the saved message and attachment in place and must not create duplicates.
- Discord supports guided interaction and approved mirrors; it is not permanent case or document storage.
- Shared calendar output uses neutral labels and never exposes client names, matter titles, case numbers, or appointment reasons.
- Technical support tickets route only to Harmony's private technical workspace and the Technical Support role unless the Owner deliberately changes that policy.
- Harmony's Technical Support account may inspect every website intake, matter, and employee view for legitimate troubleshooting; the action remains auditable and does not create ownership.
- Do not create or retain a generic Private Attorney role. Attorney permissions use the exact Non-Equity Partner, Principal Attorney, Senior Associate, or Associate Attorney role assigned by Rick.
- The Leadership routing role includes Rick, Harmony, and the HR Manager for policy, staffing, and HR review. It does not create ownership or legal authority.
- Successful /firm-matter, /mentorship, and /pi assignment workflows publish or refresh one sanitized durable badge with a direct thread link in the corresponding staff coordination channel.
- Every active employee receives a private employee category and timesheet channel visible only to that employee, Rick, Harmony, and the HR Manager. Weekly DOJ-hour proof and matching hours are due by 11:59 PM Eastern Time Sunday. Late or missing submissions are not eligible for that week's hours bonus check.
- Attorney hours bonuses use a manually entered approved hourly rate. Paralegal case payouts are set from $2,000 to $5,000 per assigned matter. Private Investigator and Civil Process Server payouts are $5,000 per assigned case or service. Weekly HR, holiday, Christmas, and extra bonuses require specific approval and are recorded separately.
- The private IBAN modal encrypts the submitted value and exposes only a last-four mask. Discord chat never contains the full value. A saved IBAN is a payment-routing record, not proof that a transfer occurred.
- Marking an approved payroll entry paid posts an itemized private receipt to the employee timesheet channel. The website payroll register remains the authoritative payment record.
- The Human Resources badge permits Rick, Harmony, or the HR Manager to create an audited private employee meeting channel with the selected employee and specifically selected authorized participants.
- Website calendar entries store exact start and end times, optional matter links, visibility, and invited staff. Shared cells remain neutral. Invited-only details are restricted to authorized viewers, and private employee tasks are visible only to the creator, Rick, and Harmony's Technical Support account.

Operational checklist

- Confirm D1 migrations are applied before registering the updated commands and employee-role map.
- Run Discord setup to reconcile the Founding Partner display role and command definitions.

- Run runtime synchronization so Staff Training receives the governance-state guide and current command list.
- Use /governance status and confirm PRE-EFFECTIVE until both activation conditions are documented.
- Do not run /governance activate as a test in production.
- After authorized activation, verify D1 state, Harmony's website title and role, Discord Owner and Founding Partner roles, retained Technical Support duties, and the audit entries.
- When Rick assigns an employee position, verify the website title, revoked prior session, audit entry, and linked Discord roles match the role-alignment table.
- Provision or reconcile employee payroll spaces, verify each private timesheet badge and button, and confirm the Human Resources private-meeting control edits its durable message in place.

Verified transcript retention

Every closed private intake, matter, Process Service packet, Mediation room, HR record, and support ticket must retain a verified transcript. The staff-only, idempotent close workflow captures Discord messages and attachment metadata to private Whatts Law object storage, stores transcript metadata and a SHA-256 digest in D1, posts a verification receipt to transcript records, posts the closure record to closed matters, and posts the actor and action to the audit log, locks the archived room against client access, and only then marks the authoritative record closed. A capture or verification failure leaves the record open for retry. Website reopen restores the linked active room where available.

Google Drive administration and employee training

Each employee completes the Google Drive lesson and may authorize a least-privilege OAuth connection beside the module completion control. Rick or Harmony selects WHATTS Law Managed Case Files as the single managed root. Employees then create or open folders only from assigned matter workspaces. The website reuses the saved matter-folder link and never treats a shared root as permission to view unassigned matters. Administration controls OAuth changes; My Settings shows employees their connection status, assigned-folder count, and notification preferences.

Private case collaboration threads

Attorney-level assigned matter staff may use /firm-matter for all assigned staff, /mentorship for assigned paralegals, and /pi assignment for assigned investigators. Mentorship and investigator assignment refuse to create a thread when the required support role is not assigned. Each successful workflow creates a private thread and publishes or refreshes one sanitized durable badge with a direct link in the matching staff coordination channel. The thread does not change website assignment, matter authority, or client visibility.

Leadership policy review

The Leadership routing role includes Rick, Harmony, and the HR Manager for policy, staffing, and HR review without creating equity or legal authority. Policy approvals retains durable Google Doc badges for the Staff Role Handbooks, Staff Policies and Operations packet, Discord Bot Operations Manual, Firm Governance and Operations Policy Version 1.2 Corrected, and the clearly labeled draft Ownership and Partnership Agreement. Review publication never activates the future 50/50 ownership state.

Client portals group records and private billing

The website client portal shows each client only linked matters, deliberately released stage content, secure messages, neutral calendar information, approved next steps, and balances. Group membership and group retainer records never expose another member’s private matter, messages, documents, or ledger. Authorized staff may post the secure portal link in the linked private matter channel or resend account information by verified direct message, but never send a passcode. Payments, balances, bills, and ledger questions use the private

Front Desk client-accounting route; Discord coordinates the request while the website ledger remains authoritative.

Accounting posting transfer and reconciliation controls

Client-payment allocations must equal the full payment. Restricted escrow and retainer funds remain separate from operating cash. Posted entries are corrected through linked reversal or adjustment rather than deletion. A cross-account movement creates linked source and destination records and remains pending until Rick or Harmony records reconciliation. HR prepares only authorized payroll and payable drafts; attorneys remain limited to assigned client and matter ledgers. Discord never carries bank numbers, balances, or transaction detail.

Recorded training attempts and management review

Ordinary employees see only the handbook and curriculum assigned to their recorded role. Rick, Harmony, and the HR Manager may review every role track and assign continuing education without changing their acting role. Opening a lesson does not mark completion. Role Readiness and assigned Bar Exam submissions store the selected questions, score, question-level review, time, and related assignment. A retake requires confirmation and creates a new attempt instead of replacing the prior result. Completion never expands access or authority.

Individual account and recovery controls

Every employee and client uses a named account. A temporary passcode forces first-login passcode confirmation and security-question setup. An audited reset revokes existing sessions; Passcode Only preserves the security question, while Full Security Reset replaces it. One-time credentials and security answers are delivered privately and never posted in a staff channel, matter record, client portal, or public message.

Discord and website health verification

The Administration Discord health view performs a live protected check of the Virtual Receptionist and Technical Support Assistant, confirms they use separate Discord identities, verifies managed-guild access, compares the D1 command registry with the Worker command contract, and reports role, category, and channel map coverage without exposing credentials. After any website, command, role, channel, or policy publication change, Technical Support runs the idempotent Discord reconciliation, confirms the health view is ready, and tests one non-production workflow from creation through authoritative D1 record, Discord update, and close.

Approved regular representation retainer

The approved regular representation retainer is $50,000 in-city currency, allocated as $35,000 attorney take-home and $15,000 Whatts Law operations. Court filing and court-service charges remain separate. The $45,000 amount used by the Silver prepaid tier is a controlled discounted eligible-matter charge and must not be described as the regular representation price.