CloudWinks

CLOUDWINKS · FOUNDATION APPS

Rolodex

Technical brief

Rolodex is each person's and company's address book. It gathers people and companies from a user's contacts so the user can find them and link or tag them to other information in CloudWinks.

1. Architecture in brief

Rolodex is a Foundation app with personal and company tenancy and the rolo_ prefix. Each address-book entry is a per-owner extension of a Crux person or company, with its own key and class and a required reference to that Crux record; it holds no copies of Crux core fields. There is no party table. A name-only contact is a Rolodex-local draft until it has a phone or email, then it is promoted: Crux finds or creates one person or company, and the draft becomes an extension of it.

2. Service boundary and intake

Contacts are added by hand or imported, including through the BusyBody contact import. The import upsert finds or creates the Crux record when a phone or email is present, or creates a name-only draft otherwise. Other apps use Rolodex only as a picker and store the Crux reference.

3. Data handled

The address book holds the owner's notes, tags, links to other records and contact-point preferences. Outreach status defaults to not approved. Duplicate review and merging happen in Crux, not in Rolodex. Archive flags replace deletion.

4. Integrations and ownership

Crux holds the person and company records and the verification and merge process. KeyKook controls access. BusyBody contact import goes through the Rolodex import. Zibit and DreamDrafter offer Rolodex as the picker for people and companies, and store Crux references. BigTalk sends messages; Rolodex has no send functions.

5. Security and access

Each address book is owner-filtered and private; views fail closed. Revealing a protected contact point requires an explicit grant and is recorded. A contact never becomes a login. Nothing is granted to PUBLIC.

Competitive context

ALTERNATIVE	ITS FOCUS	CLOUDWINKS PRODUCT FOCUS
Google Contacts	A personal address book synced across devices.	Each contact linked to one shared Crux record, so the same person exists once across every CloudWinks app.
HubSpot CRM	Contact and company records with relationship labels and activity history.	A private address book only; the shared record and duplicate merging belong to Crux.

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