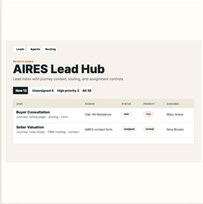
AIRES LEAD HUB

Turn website traffic into an accountable lead workflow.

Capture inquiries, summarize visitor intent, route by project or listing, assign the right agent, and give each team member a focused portal for follow-up.

Request full demo | View Hub screens | Open working demo



01
Intent capture
Forms send structured source, project, and visitor journey data into the Hub instead of leaving context trapped on the website.

02
AI-assisted follow-up
Lead cards can turn journey context into a short insight and a personalized response draft for the agent to review.

03
Routing control
Brokerages can map listings, communities, lead types, and manual overrides to the agent or team responsible for follow-up.

CLIENT WALKTHROUGH

Use this as the Monday demo path.

The cleanest client experience is not a pile of links. Send one public starting point, let the prospect understand the brokerage website, then screen-share the private Lead Hub so the operating layer is explained with context.

Open client prep page | Open Rising Hills

Send — **Send one public link before the call**
Use the Lead Hub page or Monday client email page as the client-safe starting point. The prospect can review the public story without needing a password.

Click — **Have them open Rising Hills, then the Hub screens**
Rising Hills shows what the brokerage website can look like. The Hub screens show what happens after someone asks for information.

Share — **Screen-share the private Hub live**
During the call, show the lead inbox, lead detail, routing, agent view, broker dashboard, CRM pilot path, and launch checklist from the protected workspace.

Close — **End with one first-launch decision**
Pick the first community, listing set, agent group, or CRM sample path that would prove value for the brokerage.

WHAT TO SHOW LIVE

The complete website-to-Hub workflow.

- Public community site and curated property path
- Request Full Demo form captured into the Hub
- Visitor journey and lead source context
- Lead inbox, lead detail, status, assignment, and Smart Lists
- Project/listing routing and manual override controls
- Agent portal filtered to each agent's own leads
- Broker accountability dashboard and launch checklist
- CSV/import-first CRM validation path before API sync

WORKING DEMO PATH

See the Hub in context, not as a disconnected dashboard.

Start with the Working Demo when sharing AIRES before a call. It gives prospects the short path through Rising Hills, the Hub overview, and the private workflow that will be screen-shared live.

01 Working Demo
The short client-ready link with a 10-minute review path, clear private-Hub screen-share expectation, and supporting demo assets.

02 Rising Hills community site
Public website, curated listings, sitemap concept, and buyer-facing calls to action.

03 Optional detailed demo guide
Longer review path with feature map, launch questions, and the deeper explanation for decision-makers.

CLIENT NEXT STEP

Move from demo interest to one controlled first launch.

AIRES is easiest to evaluate when the first project is specific. Start with one launch that proves the public website, private Hub, agent workflow, and broker reporting before scaling to more communities or agents.

01
Pick one first launch
Choose a community, listing campaign, event, or agent group that can prove the workflow without overloading the first build.

02
Confirm owners and routing
Map who receives each lead type, what should be assigned automatically, and where a broker should still have manual override control.

03
Map CRM or export handoff
Start with a clean CSV/export path if needed, then graduate to webhook or API sync once the client system and field rules are confirmed.

04
Approve the launch path
Turn the walkthrough into a scoped package with setup tasks, support tier, follow-up expectations, and a go-live checklist.

Start the working demo | Review first launch plan | Scope a first launch privately

WHO IT HELPS

One Hub, different views for the brokerage team.

The public website creates demand. The private Hub turns that demand into an organized workflow for brokers, agents, and the people asking for help.

BROKER / ADMIN

A command center for response accountability.

- See every new inquiry, assigned owner, lead status, priority, and follow-up gap.
- Review project routing, Smart Lists, export readiness, and reporting without asking agents for updates.
- Track launch health for one community first, then expand the same operating layer across more campaigns.

AGENT

A focused workspace for only their own leads.

- Open a role-based portal with assigned leads, visitor journey context, notes, and next actions.
- Use AI-drafted response language as a starting point while keeping the agent in control of the message.
- Work buyer, seller, listing, event, and registration leads without seeing brokerage-wide settings.

CLIENT / CONSUMER

A smoother path from interest to real follow-up.

- Browse a polished community, listing, event, or agent page that feels specific instead of generic.
- Submit a simple form while AIRES preserves the context of what they viewed before reaching out.
- Get routed to the right person faster because the Hub knows the project, source, and likely intent.

DEMO ACCESS BOUNDARY

Send the public story first. Show the private operating layer live.

- Public pages are safe to send as a first link.
- Protected Hub screens are best screen-shared live first so lead data, roles, and routing make sense.
- Direct Hub access should be created intentionally with role-specific broker, admin, or agent accounts.
- The first launch can start with CSV/export proof, then move toward CRM/webhook/API sync as requirements are confirmed.

PRODUCT PREVIEW

The Hub is the private operating layer behind the public site.

The public website stays polished and conversion-focused. The private Hub gives the team the routing, assignment, and follow-up controls that make the site useful after the form is submitted.

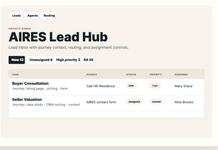
ZERO-DROPPED-LEAD CONTEXT

AI Insight: Buyer reviewed Oak Hill listing content before submitting. Prioritize a specific, property-aware follow-up.

Traditional forms say someone wants information. Lead Hub shows what they cared about before they asked.

INBOX

See every lead with source context and next action controls.
Filter by status, priority, assigned agent, project, or search term, then assign, update status, export, or draft a response.



PROJECT ROUTING

Route listings and communities to the right owner.
Use project rules for featured listings, neighborhoods, buyer inquiries, seller requests, and manual overrides when a lead needs a different owner.

AGENT PORTAL

Give agents the leads they need to work.
Each agent can sign in with named role-based access to a focused lead view, review visitor context, and respond without exposing brokerage-wide settings.

REQUEST FULL DEMO

See how Lead Hub would work for your brokerage.

Share the team size, lead sources, and routing problems you want solved. The request will go straight into AIRES Lead Hub with source and journey context attached.

Agent portals | Project routing | Smart lists | AI lead insights | Follow-up automation

Name: Your name
Work email: Your email address
Phone: Best contact number
Brokerage or team: Company name
Team size: 1-5 agents
Primary goal: Lead Hub full demo
What should the demo focus on?: Tell us where leads come from today and what needs to happen after someone submits a form.

Request full demo

PRIVATE ADMIN

AIRES Lead Hub

Phase 1 lead inbox for captured website and demo submissions.

New 11 | Unassigned 12 | High priority 4 | Demo requests 1 | Launch intake 1 | No first contact 19 | Overdue tasks 16 | Due today 18 | Registrations 6 | Archived/lost 2 | All 23

Rising Hills Walk-Ins 6 | Walk-In / On-Site Registrations 0 | Seller leads needing first touch 0 | Inside Sales First Response 14 | Inside Sales First Response 4 | Oak Hill high-intent buyers 1 | Mary Grace overdue follow-ups 1 | Manage Smart Lists

Client: All clients | Search leads: Name, email, listing, community | Assigned to: Any assignee | Search | Export CSV

Reports | Advanced data

BROKER-FRIENDLY STATUS LANGUAGE

New lead triage

11

Fresh inquiries that need a quick human review. Assign ownership, confirm the lead context, and decide the first follow-up.

View status guide

Export and CRM handoff

11

Use the current filters to download a broker-ready CSV or queue a CRM sync job for the next adapter.

Ready for handoff

Generic CRM CSV

Generic CRM CSV handoff is ready to download or queue with 24 mapped columns.

ROWS: **11 filtered leads**

PRESET: **Broker-ready lead report preset selected**

PROOF STEP: Export history · Integrations

CRM target: Generic CRM CSV | Export preset: Broker-ready lead report | Queue CRM sync | Download current CSV | Manage export presets

CSV preview
Broker-ready lead report · 11 rows · 24 columns

SELECT	LEAD	SOURCE	STATUS	PRIORITY	ASSIGNED	RECEIVED
○	Rosabel Edney email hidden AIRES Demo First Launch Scope Demo intent: First launch scope WARM Warm lead from AIRES launch intake request about First Launch Scope.	AIRES launch intake request /contact/	Needs review	normal	Unassigned	Jul 17, 12:42 PM
○	Alina email hidden AIRES Demo Contact WARM Warm lead from AIRES contact form about Contact.	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 11, 4:55 PM
○	Radhika email hidden AIRES Demo Featured Inventory Module WARM Warm lead from AIRES contact form about Featured Inventory Module.	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 8, 7:38 PM
○	Danish email hidden AIRES Demo Danish WARM Warm lead from AIRES contact form about Danish.	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 4, 8:16 PM
○	Launch Intake Browser Test email hidden AIRES Demo First Community Launch Demo intent: First launch scope Launch intake: Community website WARM Warm launch-intake lead requested Community website for Rising Hills Monday launch proof. View journey	AIRES contact form /contact/? Interest: First community launch	Needs review	normal	Unassigned	Jul 4, 2:17 AM
○	Danish email hidden AIRES Demo Danish WARM Warm lead from AIRES contact form about Danish.	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 3, 3:47 AM
○	Antonietta Sawyers email hidden AIRES Demo Crm Lead Routing WARM Warm lead from AIRES contact form about Crm Lead Routing.	AIRES contact form /contact/? Interest: The Ashton	Needs review	normal	Unassigned	Jul 2, 4:46 AM
○	Maya Bennett email hidden · (phone hidden Rising Hills Rising Hills Model Home HIGH High lead asked about Rising Hills Model Home.	Rising Hills Model Home /registration/rising-hills-model-home/	Needs review	high	Emma Reed	Jun 29, 11:04 PM
○	Import Smoke 20260627191101 email hidden · phone hidden AIRES Demo Crm Import WARM Warm lead from Follow Up Boss about Crm Import.	Follow Up Boss /admin/imports	Needs review	normal	Unassigned	Jun 27, 11:11 PM
○	Resend Test Lead email hidden · phone hidden AIRES Demo Contact WARM Warm lead from AIRES contact form about Contact.	AIRES contact form /contact/	Needs review	normal	Unassigned	Jun 26, 7:14 PM
○	Avery Morgan email hidden · (phone hidden AIRES Demo Oak Hill Residence HIGH High lead asked about Oak Hill Residence.	Mary Grace agent demo /mary-grace/listings/oak-hill-residence/	Needs review	high	Mary Grace	Jun 26, 5:32 PM

Lead actions | Assign to: Select agent | Assign agent | Status: Needs review | Update status

Resend notification | AI-drafted response

AIRES Lead Hub
ADMIN CONSOLE · POWERED BY AIRES

Public site | Lead Hub page | Sign out

Dashboard | Roadmap | Release Notes | Demo Ready | Governance | Launch | Paid Readiness | Support | Packet | Approval
Share Room | Scope | Handoff | Security | Privacy | Credential Review | Reports | Meetings | Leads | Demo Pipeline | Clients | Users
Agents | Routing | Registration | Integrations | Imports | Import Presets | Exports | Smart Lists | Follow-Up | Templates | Onboarding

PRIVATE ADMIN

AIRES Lead Hub

Phase 1 lead inbox for captured website and demo submissions.

New 11 | Unassigned 12 | High priority 4 | Demo requests 1 | Launch intake 1 | No first contact 19 | Overdue tasks 16
Due today 18 | Registrations 6 | Archived/lost 2 | All 23

Rising Hills Walk-Ins 6 | Walk-In / On-Site Registrations 0 | Seller leads needing first touch 0 | Inside Sales First Response 14
Inside Sales First Response 4 | Oak Hill high-intent buyers 1 | Mary Grace overdue follow-ups 1 | Manage Smart Lists

Client: All clients
Search leads: Name, email, listing, community
Assigned to: Any assignee
Search | Export CSV

Reports | Advanced data

BROKER-FRIENDLY STATUS LANGUAGE

Launch intake

1

Brokerage setup or demo requests that need operator scoping. Turn the intake into launch tasks, access needs, CRM questions, and approval timing.

View status guide

Export and CRM handoff

1

Use the current filters to download a broker-ready CSV or queue a CRM sync job for the next adapter.

Ready for handoff

Generic CRM CSV

Generic CRM CSV handoff is ready to download or queue with 24 mapped columns.

ROWS: 1 filtered lead
PRESET: Broker-ready lead report preset selected
PROOF STEP: Export history · Integrations

CRM target: Generic CRM CSV
Export preset: Broker-ready lead report
Queue CRM sync | Download current CSV | Manage export presets

CSV preview
Broker-ready lead report · 1 row · 24 columns

SELECT	LEAD	SOURCE	STATUS	PRIORITY	ASSIGNED	RECEIVED
○	Launch Intake Browser Test email hidden AIRES Demo First Community Launch Demo intent: First launch scope Launch intake: Community website WARM Warm launch-intake lead requested Community website for Rising Hills Monday launch proof. View journey	AIRES contact form /contact/? Interest: First community launch	Needs review	normal	Unassigned	Jul 4, 2:17 AM

Lead actions
Assign to: Select agent | Assign agent
Status: Needs review | Update status
Resend notification | AI-drafted response

Hub support: support@useaires.com

PRIVATE ADMIN

AIRES Lead Hub

Phase 1 lead inbox for captured website and demo submissions.

New 11 | Unassigned 12 | High priority 4 | Demo requests 1 | Launch intake 1 | No first contact 19 | Overdue tasks 16 | Due today 18 | Registrations 6 | Archived/lost 2 | All 23

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Client: All clients | Search leads: Name, email, listing, community | Assigned to: Any assignee | Search | Export CSV | Reports | Advanced data

BROKER-FRIENDLY STATUS LANGUAGE

All leads

23

The full searchable lead record across statuses and queues. Filter by client, assignee, status, or Smart List for a narrower broker view.

View status guide

Export and CRM handoff

23

Use the current filters to download a broker-ready CSV or queue a CRM sync job for the next adapter.

Ready for handoff

Generic CRM CSV

Generic CRM CSV handoff is ready to download or queue with 24 mapped columns.

ROWS: 23 filtered leads | PRESET: Broker-ready lead report preset selected | PROOF STEP: Export history · Integrations

CRM target: Generic CRM CSV | Export preset: Broker-ready lead report | Queue CRM sync | Download current CSV | Manage export presets

CSV preview

Broker-ready lead report · 23 rows · 24 columns

SELECT	LEAD	SOURCE	STATUS	PRIORITY	ASSIGNED	RECEIVED
○	**Rising Hills Visitor** email hidden · phone hidden Rising Hills Rising Hills Model Home WARM **Warm lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	Owner assigned	normal	Emma Reed	Jul 20, 4:13 PM
○	**Rising Hills Visitor** email hidden · phone hidden Rising Hills Rising Hills Model Home WARM **Warm lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	Owner assigned	normal	Emma Reed	Jul 20, 4:11 PM
○	**Rosabel Edney** email hidden ARES Demo First Launch Scope Demo intent: First launch scope WARM **Warm lead from AIRES launch intake request about First Launch Scope.**	AIRES launch intake request /contact/	Needs review	normal	Unassigned	Jul 17, 12:42 PM
○	**Alina** email hidden ARES Demo Contact WARM **Warm lead from AIRES contact form about Contact.**	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 11, 4:55 PM
○	**Radhika** email hidden ARES Demo Featured Inventory Module WARM **Warm lead from AIRES contact form about Featured Inventory Module.**	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 8, 7:38 PM
○	**Danish** email hidden ARES Demo Danish WARM **Warm lead from AIRES contact form about Danish.**	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 4, 8:16 PM
○	**Launch Intake Browser Test** email hidden ARES Demo First Community Launch Demo intent: First launch scope Launch intake: Community website WARM **Warm launch-intake lead requested Community website for Rising Hills Monday launch proof.** View journey	AIRES contact form /contact/?interest=first-community-launch	Needs review	normal	Unassigned	Jul 4, 2:17 AM
○	**Danish** email hidden ARES Demo Danish WARM **Warm lead from AIRES contact form about Danish.**	AIRES contact form /contact/	Needs review	normal	Unassigned	Jul 3, 3:47 AM
○	**Antonietta Sawyers** email hidden ARES Demo Crm Lead Routing WARM **Warm lead from AIRES contact form about Crm Lead Routing.**	AIRES contact form /contact/?interest=The+Ashton	Needs review	normal	Unassigned	Jul 2, 4:46 AM
○	**Maya Bennett** email hidden · iphone hidden Rising Hills Rising Hills Model Home HIGH **High lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	Needs review	high	Emma Reed	Jun 29, 11:04 PM
○	**Sophia Martinez** email hidden · iphone hidden Rising Hills Rising Hills Model Home WARM **Warm lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	First contact made	normal	Caleb Stone	Jun 29, 8:04 PM
○	**Daniel Price** email hidden · iphone hidden Rising Hills Rising Hills Model Home HIGH **High lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	Appointment set	high	Emma Reed	Jun 29, 5:04 PM
○	**Import Update Smoke Revised** email hidden · phone hidden ARES Demo Rising Hills WARM **Warm lead asked about Rising Hills.**	Update Smoke Duplicate /admin/imports	Archived	normal	Unassigned	Jun 28, 12:37 PM
○	**Import Smoke Lead** email hidden · phone hidden ARES Demo Rising Hills WARM **Warm lead asked about Rising Hills.**	Mapped Smoke Import /admin/imports	Archived	normal	Unassigned	Jun 28, 11:49 AM
○	**Oliver Kim** email hidden · iphone hidden Rising Hills Rising Hills Model Home WARM **Warm lead asked about Rising Hills Model Home.**	Rising Hills Model Home /registration/rising-hills-model-home/	Owner assigned	normal	Emma Reed	Jun 28, 11:04 PM
○	**Import Smoke 20260627191101** email hidden · phone hidden ARES Demo Crm Import WARM **Warm lead from Follow Up Boss about Crm Import.**	Follow Up Boss /admin/imports	Needs review	normal	Unassigned	Jun 27, 11:11 PM
○	**Journey Test Lead** email hidden ARES Demo Marketing Site Rebuild WARM **Warm property lead reviewed listing or community content before submitting about Marketing Site Rebuild.** View journey	AIRES contact form /contact/?Journeytest=2ef50406	Owner assigned	normal	Alex Carter	Jun 26, 11:35 PM
○	**Resend Test Lead** email hidden · phone hidden ARES Demo Contact WARM **Warm lead from AIRES contact form about Contact.**	AIRES contact form /contact/	Needs review	normal	Unassigned	Jun 26, 7:14 PM
○	**Superman** email hidden ARES Demo Featured Inventory Module WARM **Warm lead from AIRES contact form about Featured Inventory Module.**	AIRES contact form /contact/?interest=Seller+valuation+with+Mary+Grace	Owner assigned	normal	Alex Carter	Jun 26, 6:35 PM
○	**Jordan Taylor** email hidden · iphone hidden ARES Demo Seller Consultation WARM **Warm lead from Mary Grace agent demo about Seller Consultation.**	Mary Grace agent demo /mary-grace/	Owner assigned	normal	Nina Brooks	Jun 26, 5:32 PM
○	**Avery Morgan** email hidden · iphone hidden ARES Demo Oak Hill Residence HIGH **High lead asked about Oak Hill Residence.**	Mary Grace agent demo /mary-grace/listings/oak-hill-residence/	Needs review	high	Mary Grace	Jun 26, 5:32 PM
○	**Casey Rivera** email hidden · iphone hidden ARES Demo Grace at Rising Properties HIGH **High lead asked about Grace at Rising Properties.**	Rising Properties community demo /rising-properties/grace/	Owner assigned	high	Rising Properties Sales Team	Jun 26, 5:32 PM
○	**Sam Patel** email hidden ARES Demo Crm Lead Routing WARM **Warm lead from AIRES contact form about Crm Lead Routing.**	AIRES contact form /contact/	First contact made	normal	Unassigned	Jun 26, 5:32 PM

Lead actions

Assign to: Select agent | Assign agent | Status: Needs review | Update status

Resend notification | AI-drafted response

Sign out

SERVICE CONFIGURATION

Rising Hills Realty Group

Jessika Lund-King · Sole · Scale & Agent Growth · Demo ready

Back to Clients | Edit Profile | Send Invite | Artifact Audit | Meetings | Leads | Agents | Routing

4 of 6

6	0	47	3	0	0	0
Total leads	Active leads	Agents	Listings	Reading rules	Invites
Lifetime lead volume	Currently in pipeline	Total agent roster	Active listings	Active routing rules	Pending invitations

CLIENT LIFECYCLE · STANDARD · 2026-04-21

Work the client from intake to live in 90 days.

This is the criminal partner with after Free Beta Brokerage Group Wright closes a workspace. It runs the dashboard partners into one client from intake to live.

Setup	60/70 days	90/100 days	120/130 days	180 days
Setup	Launch Checklist	Pre-Flight Checklist	Commercial Unlock	Renewal
Contract signed, workspace provisioned, credentials issued	8-of-10 checklist items complete	9-of-10 checklist items complete	Criminal background check cleared	Anniversary of go-live

Partner profile

Jessika Lund-King · Sole · Scale & Agent Growth · Demo ready

Partner account phone and email are shared with the client's phone and email. Jessika Lund-King is the sole operator. Scale & Agent Growth is the partner's current plan. Demo ready means the partner has completed a live demo walkthrough.

Active pipeline snapshot

Open	Awaiting	Approved	Rejected
Partner account phase	Pre-Flight Checklist review	Pre-Flight Checklist approved	Pre-Flight Checklist rejected
Pre-Flight Checklist not yet submitted	Pre-Flight Checklist submitted, awaiting review	Pre-Flight Checklist approved, 90-day countdown active	Pre-Flight Checklist rejected, remediation required

Active blocks

Pre-Flight Checklist

Pre-Flight Checklist

Partner account phase

Pre-Flight Checklist not yet submitted

Pre-Flight Checklist submitted, awaiting review

Pre-Flight Checklist approved, 90-day countdown active

Pre-Flight Checklist rejected, remediation required

Pre-Flight Checklist

Pre-Flight Checklist

Pre-Flight Checklist

AIRES Lead Hub
ADMIN CONSOLE · POWERED BY AIRES

Public site | Lead Hub page | Sign out

Dashboard | Roadmap | Release Notes | Demo Ready | Governance | Launch | Paid Readiness | Support | Packet | Approval | Share Room | Scope | Handoff | Security | Privacy | Credential Review | Reports | Meetings | Leads | Demo Pipeline | Clients | Users | Agents | Routing | Registration | Integrations | Imports | Import Presets | Exports | Smart Lists | Follow-Up | Templates | Onboarding

BROKER LAUNCH WIZARD

Rising Hills Realty Group

useaires.com/rising-hills · Scale & Agent Growth · Demo ready

Dashboard | Launch checklist | Go-live handoff | Artifact vault | Leads

Client: Rising Hills Realty Group | Open wizard

PRODUCTION READINESS SCORE

Blocked before go-live

75%

Critical launch requirements are still open. Clear the blocked items before treating this workspace as production-ready.

9/12 checks passed | 1 critical blockers | Launch gate context

- OK **Brand and workspace** — Brand, domain, or workspace identity is present. — Review
- OK **Named Hub access** — 1 active Hub user and 0 pending invites. — Review
- OK **Session sign-in proof** — 464 successful Hub session sign-ins logged. — Review
- OK **Active agent roster** — 2 active agents out of 2 total. — Review
- ! **Routing ownership** — 0 enabled routing rules configured. — Open routing
- OK **Capture path** — Forms or registration capture is marked ready. — Review
- OK **Lead proof** — 6 total leads available for proof. — Review
- OK **CRM/export readiness** — 71% ready · The CRM/export path is partially configured; finish the missing proof before calling it launch-ready. — Review
- OK **Production CRM approval** — No CRM destination requires approval yet. — Review
- OK **CRM import closeout** — No CRM import batch requires closeout yet. — Review
- Next **QA and mobile review** — Complete QA and mobile review before final launch. — Open checklist
- Next **Final launch approval** — Keep launch approval open until the broker signs off. — Open checklist

Open Launch Wizard | Open Go-Live Handoff | Open Launch Checklist

Go-live gate:
Clear critical blockers first: Routing ownership.

GO-LIVE APPROVAL

Go-Live Approval Record

Approved With Conditions

Archive the Production Readiness Score, required confirmations, launch conditions, and support handoff notes before production launch.

75% Current score | 9/12 Checks passed | 1 Critical blockers | 1 Approvals logged

Approval status: Needs Follow Up

Approved by: Broker owner, operator, or AIRES admin

Archive location: Drive folder, client launch folder, CRM notes, or internal ticket URL

- [ ] Final launch approval confirmed
- [ ] Named Hub/session access confirmed
- [ ] Routing ownership confirmed
- [ ] Support handoff/archive path confirmed
- [ ] QA and mobile review confirmed
- [ ] CRM/export handoff confirmed
- [ ] Lead capture proof confirmed

Approval notes:
Approved for launch, approved with conditions, open blockers, support handoff notes, and where final launch proof will be archived.

Record go-live approval | Download latest approval packet | Open Go-Live Handoff

▸ Recent go-live approvals 1

Launch readiness path

80%

Use this page as the first-client operating checklist. Each step links to the deeper Hub screen that owns the work.

- **2** Agents — 2 rostered agents.
- **0** Routing — Enabled routing rules.
- **1** Events — Active registration events.
- **1** Hub users — 0 pending invites.
- **464** Session sign-ins — 0 fallback uses logged.
- **6** Active leads — 6 total leads.
- **3** Modules — Enabled product modules.

Launch status: Demo ready

- [x] Strategy and offer defined
- [x] Brand assets and colors loaded
- [x] Domain or launch path assigned
- [x] Agent roster configured
- [x] Project/listing routing configured
- [x] Lead forms connected
- [x] Email notifications tested
- [x] Core pages and content ready
- [ ] QA and mobile review complete
- [ ] Approved for launch

Save launch progress

MONDAY DEMO

Broker View screen-share path

7 of 9

Use this as the protected Hub reveal: show the operating system in a focused order without exposing private credentials in the client email.

- S1 **Client Dashboard** — Start with the client workspace, launch checklist, CRM readiness, branding, and account snapshot. — Ready
- S2 **Launch Wizard** — Frame the transition from demo to paid launch with setup progress, blockers, access proof, and handoff summary. — Review
- S3 **Go-Live Handoff** — Use the final operator page for client-safe links, protected Hub links, readiness proof, blockers, and a copyable go-live summary. — Review
- S4 **Lead Inbox** — 6 active leads available for inbox filters, assignment, status, and bulk actions. — Ready
- S5 **Lead Detail** — Show Rising Hills Visitor with source context, timeline, tasks, notes, and follow-up. — Ready
- S6 **CRM Readiness** — 71% ready: destinations, credentials, approval, exports/imports, sync jobs, and delivery proof. — Ready
- S7 **Registration Event** — 1 active event for QR, open-house, model-home, or sales-center capture. — Ready
- S8 **Agent Portal** — 2 active agents ready for agent-specific lead queues and follow-up work. — Ready
- S9 **Reports** — Close the Hub reveal with broker accountability, source quality, exports, CRM sync jobs, and registration reporting. — Ready

Run sheet | Client guide | Demo assets

LIVE CALL CHECKLIST

Monday Live Checklist

5 steps

Run the client walkthrough in this order: public proof, private Hub reveal, operating evidence, follow-up capture, then proposal close.

- S1 ONE-LINK CLIENT OPEN — **Start with the safe public preview**: Send or open the Working Demo first so the client sees the community site, Lead Hub overview, first-launch scoping path, and request-demo path without private credentials. — Open Working Demo — Client guide | Rising Hills
- S2 PROTECTED HUB REVEAL — **Screen-share the operating layer**: Use the Broker View path above to show how the Hub turns site traffic into accountable leads, assignments, routing, registrations, reports, and agent proof. — Start Launch Wizard — Lead Inbox | Dashboard
- S3 OPERATING PROOF — **Open one real lead and the CRM plan**: 6 leads and 71% CRM readiness give you the proof points for journey context, assignment history, exports, and [illegible] — Open lead proof — CRM readiness | Reports
- S4 FOLLOW-UP CAPTURE — **Log the client decision path live**: After questions, capture decision owner, next step, proposal track, value, and follow-up date so the demo becomes an active [illegible] — Open Meeting Tracker — Go-live handoff | Post-call recap
- S5 PROPOSAL CLOSE — **Move into the right launch package**: Close by choosing Community Launch, Brokerage Growth, or Multi-Community OS, then send the approval packet and next-step [illegible] — Open Proposal Builder — First Launch Plan | Follow-up email

Launch blockers

3 open

Resolve these items before calling this workspace launch-ready.

- **Add at least one active routing rule.** — Open routing
- **Complete QA and mobile review.** — Open checklist
- **Keep final launch approval open until the client signs off.** — Review checklist

Production hardening

3 of 6

Use this bridge after the demo works and before a real brokerage treats the workspace as live operations.

- Ready — **Role-specific Hub users**: 1 active Hub user(s) configured for this workspace. — Manage users
- Ready — **Durable session proof**: 464 successful Hub session sign-in(s) logged. Use this before disabling shared access. — Review access
- Ready — **Shared fallback phase-out**: No recent shared fallback use is logged for this workspace. Production can move toward session-only access after owner approval. — Access plan
- Review — **Lead and routing proof**: 2 active agent(s), 0 routing rule(s), and 6 lead record(s) are available for handoff proof. — Open leads
- Review — **Public form and QA**: Complete mobile/browser QA after forms or registration are wired. — Open checklist
- Review — **CRM and data boundary**: Confirm day-one export or CRM handoff, keep production CRM tokens in Worker secrets, and align privacy/data-retention expectations before launch. — Open integrations

Demo mode can keep shared fallback access enabled. Paid client launch should use named Hub users, session sign-in proof, scoped client data, secret-managed CRM credentials, and a documented support package.

Client launch handoff

2 open

Copy this into post-demo notes, launch planning, or a client follow-up after the walkthrough.

```
Rising Hills Realty Group AIRES launch snapshot

Workspace: useaires.com/rising-hills
Plan: Scale & Agent Growth / Scale & Agent Growth
Launch status: Demo ready
Readiness: 8 of 10 launch checklist items complete (80%).

Configured today: 2 active agents, 0 active routing rules, 1 registration events, 1 active Hub users, 6 active leads, 464 session sign-ins, and 3 enabled modules.
Access proof: 464 successful Hub session sign-ins and 0 shared fallback uses logged.
```

Copy handoff summary

- 1 READY — **Client settings and brand**: Confirm domain, plan, support package, modules, brand colors, scheduling links, and launch status. — Open client settings
- 2 READY — **Agents and account access**: 2 active agents, 1 active Hub users, and 0 pending invitations are configured. — Review Hub users
- 3 NEEDS REVIEW — **Routing and follow-up**: 0 enabled routing rules are ready for project, listing, source, or intent ownership. — Open routing
- 4 READY — **Forms and registration**: 1 active registration events are configured for QR, model-home, open-house, or sales-center capture. — Open registration
- 5 READY — **Lead proof and QA**: 6 total leads and 6 active leads are available for inbox, assignment, and follow-up proof. — Open leads
- 6 NEEDS REVIEW — **Go-live approval**: Review the launch checklist, confirm demo-safe access, confirm CRM production approval, then move the client from setup into live operations. — Review dashboard

GO-LIVE HANDOFF

Rising Hills Realty Group

usearies.com/rising-hills · Scale & Agent Growth · Demo ready

Launch wizard | Client dashboard | Security review | Artifact vault | Client guide

Client

Rising Hills Realty Group | Open handoff

PRODUCTION READINESS SCORE

Blocked before go-live

75%

Critical launch requirements are still open. Clear the blocked items before treating this workspace as production-ready.

8/12 checks passed | 1 critical blockers | Handoff gate context

- OK **Brand and workspace** — Brand, domain, or workspace identity is present. — Review
- OK **Named Hub access** — 1 active Hub user and 0 pending invites. — Review
- OK **Session sign-in proof** — 464 successful Hub session sign-ins logged. — Review
- OK **Active agent roster** — 2 active agents out of 3 total. — Review
- ! **Routing ownership** — 0 enabled routing rules configured. — Open routing
- OK **Capture path** — Forms or registration capture is marked ready. — Review
- OK **Lead proof** — 6 total leads available for proof. — Review
- OK **CRM/export readiness** — 71% ready - The CRM/export path is partially configured; finish the missing proof before calling it launch-ready. — Review
- OK **Production CRM approval** — No CRM destination requires approval yet. — Review
- OK **CRM import closeout** — No CRM import batch requires closeout yet. — Review
- Beat **QA and mobile review** — Complete QA and mobile review before final launch. — Open checklist
- Beat **Final launch approval** — Keep launch approval open until the broker signs off. — Open checklist

Open Launch Wizard | Open Go-Live Handoff | Open Launch Checklist

Go-live gate:
Clear critical blockers first: Routing ownership.

GO-LIVE APPROVAL

Go-Live Approval Record

Approved With Conditions

Archive the Production Readiness Score, required confirmations, launch conditions, and support handoff notes before production launch.

75% Current score | 8/12 Checks passed | 1 Critical blockers | 1 Approvals logged

Approval status: Needs Follow Up

Approved by: Broker owner, operator, or ARIES admin

Archive location: Drive folder, client launch folder, CRM notes, or internal ticket URL

- [ ] Final launch approval confirmed
- [ ] QA and mobile review confirmed
- [ ] Named Hub/session access confirmed
- [ ] CRM/export handoff confirmed
- [ ] Routing ownership confirmed
- [ ] Lead capture proof confirmed
- [ ] Support handoff/archive path confirmed

Approval notes:
Approved for launch, approved with conditions, open blockers, support handoff notes, and where final launch proof will be archived.

Record go-live approval | Download latest approval packet | Open Go-Live Handoff

Recent go-live approvals 1

CREDENTIAL HANDOFF FINALIZER

Hold credentials until proof is complete

Hold

Owner-only final review for who gets access, what setup link is sent, which support lane applies, and what must be archived before real client credentials go out.

1	Invite link	Scale & Agent Growth	5	7 records	71%
Who gets access 0 pending invitations.	**What gets sent** One-time setup link from Hub Users; no token shown here.	**Support package** support@usearies.com	**Session proof** 0 fallback uses logged.	**Archive before sending credentials** Access, credential, cleanup, provisioning, support, approval, private gate.	**CRM context** CRM in progress

- Owner account — Create or activate the client owner before credential handoff. — Open
- Broker admin path — Broker admin access exists through a user or pending invite. — Ready
- Session proof — 5 successful named Hub sign-ins logged. — Ready
- Go-live approval — Latest approval: Approved With Conditions. — Ready
- Archive packet — Production readiness is 75% with 8/12 checks passing. — Ready

Rising Hills Realty Group credential handoff finalizer

Decision: Hold credentials until open access/archive items are complete.
Support package: Scale & Agent Growth
Support contact: support@usearies.com
Plan tier: Scale & Agent Growth
Active Hub users: 1
Pending invitations: 0
Session sign-ins: 5
CRM readiness: 71% - The CRM/export path is partially configured; finish the missing proof before calling it launch-ready.

What gets sent: one-time setup links through Hub Users only. This finalizer does not send email and does not expose invite tokens.

Copy credential handoff | Download credential handoff packet | Manage Hub users

No email is sent from this panel.
Send final invitations from Hub Users only after this packet and the required launch archive records are saved.

NAMED CLIENT ACCESS FINALIZATION

Hold final client credentials

4 of 10

Final send-or-hold checkpoint for real brokerage Hub access, combining account proof, session proof, fallback approval, isolation proof, credential archive, and go-live approval.

- Owner account finalization — Record permanent owner, broker-admin, recovery, credentials-note, and temporary-account cleanup proof. — Open
- Named access path — Owner missing; broker-admin path exists. — Open
- Session login proof — 5 successful Hub sign-ins; 0 owner proof archive records. — Open
- Fallback removal approval — 2 approved maintenance windows; 0 shared fallback uses in loaded proof. — Open
- Go-live approval — Latest approval: Approved With Conditions. — Ready
- Production readiness — 75% ready with 8/12 checks passing. — Ready
- Client isolation proof — Client Isolation Proof Packet is generated from protected scoped-read, scoped-write, lead/export, and agent-boundary proof. — Ready
- Credential archive — Credential Handoff Packet and Access Cutover Packet are available for owner-only archive. — Ready
- Final invite send decision — Record the owner send-or-hold decision from Hub Users before creating final invitations. — Open
- Post-cutover verification — Future proof: record only after ALLOW_BASIC_AUTH_FALLBACK=false is deployed and shared fallback is rejected. — Open

Rising Hills Realty Group named client access finalization

Decision: HOLD CLIENT ACCESS.
Ready gates: 4 of 10.
Production readiness: 75% (8/12 checks).
CRM readiness: 71% - The CRM/export path is partially configured; finish the missing proof before calling it launch-ready.
Active Hub users: 1.
Pending invitations: 0.
Session sign-ins: 5.
Owner proof archives: 0.
Owner account finalizations: 0.
Fallback maintenance approvals: 0.
Shared fallback uses in loaded proof: 0.

Open items:
- Owner account finalization: Record permanent owner, broker-admin, recovery, credentials-note, and temporary-account cleanup proof.
- Session proof: 5 successful Hub sign-ins; 0 owner proof archive records.
- Fallback removal approval: 2 approved maintenance windows; 0 shared fallback uses in loaded proof.
- Go-live approval: Latest approval: Approved With Conditions.
- Production readiness: 75% ready with 8/12 checks passing.

Copy access finalization packet | Download access finalization packet | Open Hub users | Access Cutover Packet | Artifact Vault

No email is sent from this panel.
Send final invitations from Hub Users only after the owner reviews and archives the finalization packet.

NAMED ACCESS HANDOFF READINESS

Hold client credentials for now

4 of 6

One go/no-go view for whether the brokerage can receive named Hub access, backed by access proof, isolation proof, archive packets, and go-live approval.

- Named access path — Owner missing; broker-admin path exists. — Open — Open proof
- Session proof — 5 successful Hub sign-ins logged; 0 owner proof archive records. — Ready — Open proof
- Fallback removal gate — 0 shared fallback uses in access proof; owner archive still needed; maintenance window not approved yet. — Open — Open proof
- Client isolation packet — Protected packet is available for scoped-read, scoped-write, lead/API/export, and agent-boundary proof. — Ready — Open proof
- Credential archive — Production readiness is 75% with 8/12 checks passing. — Ready — Open proof
- Go-live approval — Latest approval: Approved With Conditions. — Ready — Open proof

Rising Hills Realty Group named access handoff readiness

Decision: HOLD - do not send client credentials yet.
Ready gates: 4 of 6.
Active Hub users: 1.
Pending invitations: 0.
Successful session sign-ins: 5.
Owner proof archive records: 0.
Owner account finalization records: 0.
Fallback removal maintenance approvals: 0.
Post-cutover verification records: 0.
Shared fallback uses in loaded access proof: 0.
Production readiness: 75%.
CRM readiness: 71% - The CRM/export path is partially configured; finish the missing proof before calling it launch-ready.

Required archive before sending credentials:
- Access Finalization Packet: Hold/Ready/Complete; owner, broker, recovery, credentials-note, and temporary-account cleanup proof.
- Client Isolation Proof Packet: Hold/Ready/Complete; scoped-read, scoped-write, lead/API/export, and agent-boundary proof.
- Credential Handoff Packet: Hold/Ready/Complete; credential-archive and go-live approval proof.

Copy named access readiness | Access Cutover Packet | Client Isolation Proof Packet | Credential Handoff Packet | Artifact Vault

No email is sent from this panel.
Final Hub invitations should be sent from Hub Users only after owner review and archive proof are complete.

CLIENT GO-LIVE HANDOFF

3 blockers open

8 of 10

One operator page for the launch checklist, access proof, CRM readiness, client-safe links, protected Hub links, and remaining blockers.

80%	71%	1	464	6	3
Checklist 8 of 10 launch items.	**CRM ready** CRM in progress.	**Hub users** 0 pending invites.	**Session proof** 0 fallback uses.	**Active leads** 6 total leads.	**Modules** 0 latest modules.

Ready — **Launch checklist** — 8 of 10 items complete. — Open

Ready — **Access readiness** — 1 owner, 0 invites, 464 sign-ins. — Open

Review — **Lead/routing proof** — 0 routing, 0 uses, 6 leads. — Open

Ready — **CRM/export readiness** — 71% ready. The CRM/export path is partially configured; finish the missing proof before calling it launch-ready. Production CRM approval is [illegible] in the readiness gate. — Open

Remaining blockers

3 open

Clear these before treating the client workspace as production-ready.

- **Add an active routing rule for the first launch.**
- **Complete QA and mobile review.**
- **Final client approval is still open.**

SEND OR LEAVE BEHIND

Client-safe links

Client Demo Guide
Safe one-link review path for the client.

Rising Hills case study
Public community launch example.

Lead Hub overview
Public explanation of the private operating layer.

CRM/API strategy
How exports, CRM handoff, and API sync can phase in.

First Launch Plan
Private scoping path for launch and support.

Request Full Demo
Launch intake path for the first real scope.

SCREEN-SHARE OR USE INTERNALLY

Protected Hub links

Client Dashboard
Launch checklist, access proof snapshot, CRM readiness.

Launch Wizard
Setup progress, blockers, hardening, Broker View.

Hub Users
Named access, invitations, session proof, fallback usage.

Lead Inbox
Lead proof: routing, status, assignment, Smart Lists.

Routing
Project/listing/source ownership rules.

Reports
Broker accountability, source mix, exports, CRM jobs.

Artifact Vault
Approval packets, CRM/import proof, access exports, and support handoff archive.

Security Review
Session, CSRF, client isolation, agent boundary, and formal review status.

Copyable handoff summary

3 blockers open

Use this for operator notes, post-demo recap, or client go-live planning.

Rising Hills Realty Group ARIES go-live handoff

Status: 3 blockers open
Workspace: usearies.com/rising-hills
Plan/support: Scale & Agent Growth / Scale & Agent Growth
Launch checklist: 8 of 10 complete (80%).
CRM readiness: 71% - The CRM/export path is partially configured; finish the missing proof before calling it launch-ready.

Configured: 2 active agents, 0 routing rules, 1 registration events, 1 active Hub users, 0 pending invites, 6 active leads.
Access proof: 464 successful Hub session sign-ins, 0 shared fallback uses logged.

Open blockers: Add an active routing rule for the first launch. Complete QA and mobile review. Final client approval is still open.

Recommended client note: send the Client Demo Guide first, review where the protected Hub, credential handoff, and go-live approval pages belong, then [illegible]

Copy go-live handoff

ARTIFACT REVISION INDEX

Launch Artifact Vault

Rising Hills Realty Group protected archive for launch approvals, CRM/import proof, access/security exports, and operator handoff packets.

Launch wizard | Launch packet | On-Go handoff | Client dashboard

Client
Rising Hills Realty Group | Open vault

PRODUCTION READINESS SCORE
Blocked before go-live — 75%

Critical launch requirements are still open. Clear the blocked items before treating this workspace as production-ready.

8/12 checks passed | **1** critical blockers | **Handoff** gate contact

- **Brand and workspace** — Brand, domain, or workspace identity is present. — Review
- **Named Hub access** — 1 active Hub user and 0 pending invites. — Review
- **Session sign-in proof** — 464 successful hub session sign-ins logged. — Review
- **Active agent roster** — 0 active agents out of 2 total. — Review
- **Routing ownership** — 0 enabled routing rules configured. — Open routing
- **Capture path** — Form or registration capture is marked ready. — Review
- **Lead proof** — 8 total leads available for proof. — Review
- **CRM/import readiness** — 175 ready · The CRM/import path is partially configured; finish the missing proof before calling it launch-ready. — Review
- **Production CRM approval** — No CRM destination requires approval yet. — Review
- **CRM import closeout** — No CRM import batch requires closeout yet. — Review
- **QA and mobile review** — Complete QA and mobile review before final launch. — Open checklist
- **Final launch approval** — Keep launch approval open until the broker signs off. — Open checklist

Open Launch Wizard | Open On-Live Handoff | Open Launch Checklist

On-Go gate
Clear critical blockers first: Routing ownership.

LAUNCH READINESS PROOF
One archive view for every client proof packet — 75%

Use this after demos, launch approvals, CRM imports, access rehearsals, and support handoffs so client proof does not get buried across Hub screens.

75%	1	0	2	20	80%
Readiness score	Go-live approvals	CRM imports	Import completions	Access events	Checklist
8 of 12 launch checks.	Coach Approved With Conditions.	No import jobs yet.	2 closed packets in CRM readiness.	464 successful session sign-ins.	8 of 10 launch items.

DEMO CLEANUP AND CLIENT PROOF
Clean client view before named access — 7/8 ready

Preserve proof records, review distracting test data, archive packets, and rerun the private gate before a real brokerage enters the Hub.

7	1	TXT
Cleanup ready	Needs review	Packet
Checklist items that already have enough proof.	Item in review before sharing named client access.	Preview/download cleanup and handoff export.

- **Preserve proof records** — 6 lead(s), 0 routing rule(s), 2 active agent(s). Keep enough proof to show capture, routing, assignment, and follow-up. — Needs review | Open dashboard
- **Identify distracting demo records** — Review routing names, old test submissions, raw journey examples, and duplicate proof leads before a real client receives named access. — Ready | Review all leads
- **Archive launch proof** — 1 go-live approval record(s), 875 launch checklist. Archive packets before changing demo data. — Ready | Open Artifact Vault
- **Confirm named-access boundary** — Active user(s), 464 session sign-in(s). A shared fallback event(s). Verify named access before removing demo only credentials. — Ready | Review Hub users
- **Confirm launch task handoff** — 8 open launch task(s). 2 without owner. Assign owners before client handoff. — Ready | Open task board
- **Confirm CRM/import boundary** — CRM in progress. 2/2 export preset(s). 2 import closeout(s). — Ready | Open CRM readiness
- **Confirm support handoff** — Scale & Ignem Growth support, support@ignemes.com. — Ready | Open Support Operations
- **Run final private gate** — 20 access event(s) logged. Rerun the private gate after cleanup decisions and before sharing named access. — Ready | Open Paid Readiness

Download cleanup packet | Review all leads | Open Paid Readiness

First-client handoff guardrail
This is a read-only cleanup plan. Archive proof first, then make any manual lead/status/access changes from the appropriate Hub screen.

FINAL APPROVAL PROOF

Launch and approval packets

- **Client progress snapshot** — Download and approve the client-safe progress snapshot before sharing.
- **Broker handoff packet** — Copy-ready blockers/ownership, launch proof, support contact, and operator notes.
- **Proposal approval packet** — Decision owner, package, approval, and proposal follow-up proof.
- **On-Go approval packet** — Latest approved Approved With Conditions by ARES smoke test.
- **Governance launch snapshot** — Owner-level launch readiness snapshot with blockers and recommended Runs.
- **Scope lock packet** — First-launch scope, intake tasks, decision path, and locked assumptions.

CREDENTIAL AND SESSION PROOF

Access and security packets

- **Access cutover packet** — Owner access evidence from this session. Captures fallback phase-out, named users, sessions, and cutover plan.
- **Credential handoff packet** — Owner access evidence from this session. Final owner review of credentials, ownership, support package, archive requirements, and sensitivity decision.
- **Named client access finalization packet** — Owner access evidence from this session. Final send-or-hold record before real brokerage access is sent.
- **Client isolation packet** — Download the client scope, write guard, leadAllSnapshot, and agent-boundary proof before named brokerage access.
- **Hub access events CSV** — Owner access evidence from this session. Exports session, fallback, and sign-in proof for the workspace.
- **Production security review** — Review CSRF, client isolation, agent boundaries, credentials, and the formal review step.
- **Credential audit CSV** — Owner access evidence from this session. Credential governance, rotation, approval, and review state without exposing secrets.

MIGRATION AND IMPORT RECORDS

CRM and import proof

- **CRM import planning packet** — Broker CRM source, fields, owner notes, import plan, and launch handoff requirements.
- **Latest import approval packet** — Latest import approval and approvers.
- **Ready-to-reimport packet** — Corrective batch outcomes for rows marked ready after failed row review.
- **Reconciliation packet** — Post-import totals, skipped/error rows, queue status, and open issue rows.
- **Import completion packet** — Latest completion archived at ARES smoke archive.

SUPPORT READY EXPORTS

Operations exports

- **Client decision tracker CSV** — Meeting outcomes, decision owner, package fit, next step, and follow-up status.
- **Follow-up delivery log CSV** — Template, owners, notification, and follow-up delivery proof.
- **Download cleanup packet** — Proof preservation checklist, distracting demo record review, and named-access handoff guardrails.
- **Launch intake tasks CSV** — Operator task list for setup, launch, client inputs, and assigned owners.
- **Launch intake tasks text** — Plain-text launch task packet for notes, support records, or email handoff.

DEMO RECORD REVIEW GUIDE
Preserve proof, review demo clutter — 5 to review

Recent leads are grouped into proof records to preserve, demo/test records to review, and neutral records that need an operator decision before named client access.

0	5	0
Proof records	Review before access	Operator decision
Recent records that help tell the launch story/follow-up story.	Recent records with test/demo signals.	Recent records without a strong proof/demo signal.

Preserve as proof

No recent proof records were identified in the sample.

Review before named access

Rising Hills Visitor · Assigned
Looks like demo/test data. Review before named client access so the live workspace feels clean.
Rising Hills Market Home · Rising Hills Market Home · Jul 22, 4:13 PM
Open lead | Audit packet

Rising Hills Visitor · Assigned
Looks like demo/test data. Review before named client access so the live workspace feels clean.
Rising Hills Market Home · Rising Hills Market Home · Jul 22, 4:13 PM
Open lead | Audit packet

Maya Bennett · New
Looks like demo/test data. Review before named client access so the live workspace feels clean.
Rising Hills Market Home · Rising Hills Market Home · Jun 28, 11:04 PM
Open lead | Audit packet

Sophia Martinez · Contacted
Looks like demo/test data. Review before named client access so the live workspace feels clean.
Rising Hills Market Home · Rising Hills Market Home · Jun 28, 9:04 PM
Open lead | Audit packet

Daniel Price · Appointment Set
Looks like demo/test data. Review before named client access so the live workspace feels clean.
Rising Hills Market Home · Rising Hills Market Home · Jun 28, 5:04 PM
Open lead | Audit packet

Open full lead review | Download cleanup packet

Cleanup rule
This panel does not delete data. Archive proof first, then use the Lead Hub or Lead Detail pages for any manual status/archive decisions.

FINAL LAUNCH REVIEW SESSION
Record the send-or-hold decision from the proof vault — Needs Follow Up

Use this after cleanup, credential handoff, support approval, and private-gate proof are archived. It creates the On-Live Approved record that tells the operator whether named client access can move forward.

7	75%	1	Approved With Conditions
Archive set	Readiness	Critical blockers	Latest approval
Required proof records before named access.	9/12 checks passed.	Routing ownership.	Jul 7, 1:48 PM

- **Access Cutover Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **Credential Handoff Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **Demo Cleanup Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **Paid Client Provisioning Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **Support Operations Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **On-Live Approved Packet** — Archive or review this proof before sending named Hub credentials. — Open proof
- **Private production gate result** — Archive or review this proof before sending named Hub credentials. — Open proof

Final decision: Needs Follow Up
Recorded by: Broker-owner, operator, or ARES admin

Archive location
Client launch folder, Drive folder, support ticket, or internal note URL

- Final launch packet archived
- Access and credential handoff packets archived
- Routing and support proof confirmed
- Support handoff packet and support lane confirmed
- Private gate and QA proof archived
- CRM/import or no-CRM boundary confirmed
- Lead capture and cleanup review confirmed

Decision notes
Ready to send named access, approved with conditions, or hold credentials until listed archive/proof items are complete.

Rising Hills Realty Group final launch archive decision

Recommended status: Needs Follow Up
Production readiness: 75% (9/12 checks passed)
Critical blockers: Routing ownership
Latest approval: Approved With Conditions by ARES smoke test on Jul 7, 1:48 PM

Before recording final archive decision, confirm these are saved:
- Access Cutover Packet
- Credential Handoff Packet
- Demo Cleanup Packet
- Paid Client Provisioning Packet

Record final archive decision | Copy archive decision | Download latest approval packet

No email is sent from this panel.
Use it to archive the final decision, then send invitations from Hub users only after the owner approves.

PRIVATE DEMO PROOF ARCHIVE
Lock the serious-client proof set — Archive set

Use this after a real broker conversation to save the exact public demo path, Share Room, broker-safe bundle, progress proof, launch readiness, support handoff, access/security proof, and follow-up decision path.

Ready	Ready
Public demo path	**Broker-safe bundle**
Client Demo Guide and Rising Hills case study after cleanup safe.	Download the Share Room bundle before or after the meeting.
Open	Open

Ready	Ready
Share Room access log	**Final decision path**
Recent Share Room opens/downloads prove who reviewed the room.	Latest approval Approved With Conditions.
Open	Open

Rising Hills Realty Group private demo final archive

Use this when a serious client conversation needs a locked proof set.
Production readiness: 75% (9/12 checks)
Launch checklist: 8 of 10 complete (80%)
CRM readiness: 175 - The CRM/import path is partially configured; finish the missing proof before calling it launch-ready.
Open setup tasks: 8

Archive order:
1. Client Demo Guide and Rising Hills case study.
2. Client Share Room and Broker Safe Packet Bundle.
3. Share Room Packet, Progress Snapshot, Launch Readiness, and Support Operations packets.
4. Access Cutover and Client Isolation proof before named access is widened.
5. Final Launch Archive Decision if the client is moving forward.

Private archive rule: no email, passcodes, setup links, API keys, raw credentials, cross-client data, or global operator details.

Private archive rule.
This is a internal locked proof set. It does not add email or expose credentials, setup links, passcodes, cross-client data, or global operator details.

PRIVATE GATE ARCHIVE RESULT
Archive the final proof before named access — Final gate

Use this as the last internal record after the private production gate passes and before a real brokerage receives Hub credentials.

- **Run final private gate** — Archive the latest `/admin/demo-ready/private/` result after public links, protected links, S3/registration health, authenticated Hub coverage, broker scope/CSRF checks, and agent session checks pass. — Open proof
- **Archive access proof** — Save the Access Cutover Packet and Hub access events before any owner-approved move toward `/#/LOR,RAISC,ACTIN,TRLLBACN/clear`. — Open proof
- **Archive isolation proof** — Save the Client Isolation Proof Packet from Production Security Review so scoped client data, write guards, and agent boundaries are documented. — Open proof
- **Archive cleanup and support handoff** — Save the Demo Cleanup Packet, Paid Client Provisioning Packet, and Support Operations Packet before named client access. — Open proof

Rising Hills Realty Group private gate archive record

Command: prpm demo:ready:private
Workspace: client_rising_hills
Readiness: 75% (9/12 checks)
Session sign-ins: 464
Go-live approvals: 1
CRM import completions: 2

Archive after the command proves:
- Public/protected link checks passed.
- D1 and registration health passed.
- Authenticated Hub coverage passed.
- Broker scope and CSRF proof passed.
- Agent boundary proof passed.
- Access Cutover Packet Required is cleared.

Copy private gate archive

Access Cutover Packet | Client Isolation Proof Packet | Credential Handoff Packet | Access Finalization Packet
Client Isolation Proof Record | Demo Cleanup Packet | Paid Client Provisioning Packet | Support Operations Packet

Archive runbook — Copy-ready

Copy this into the client launch folder, support note, or post-demo operating checklist.

Rising Hills Realty Group launch artifact archive runbook

1. Download the On-Live Approved Packet after final or conditional approval.
2. Download the Broker Handoff Packet and Governance Launch Snapshot for internal launch notes.
3. Download the Scope Lock Packet and Launch Intake task exports when the client approves the first launch scope.
4. Download the Access Cutover Packet before widening named access, changing credentials, or rerunning cleanup or sync work happened.
5. Download the Access Cutover Packet, Credential Handoff Packet, and access event CSV after secondary access is released.
6. Download the Demo Cleanup and Client Handoff Packet before sending named access to a real client.
7. Archive the private gate result after `prpm demo:ready:private` passes against production.
8. Save Share Room, the broker-safe bundle, and latest approval packet when the operator needs a shareable proof record.

Copy archive runbook

PRODUCTION SECURITY REVIEW

Rising Hills Realty Group

usealres.com/rising-hills · Demo ready · Session-only admin access

Launch wizard | Go-live handoff | Hub users

Client
Rising Hills Realty Group | Open review

Production readiness signal

6 of 8

Operator-facing proof for access controls, session checks, client isolation, agent boundaries, CRM credential approval, credential handling, and the remaining formal audit step.

1	464	Scoped	Private
Hub users	Session sign-ins	Client data	Release gate
1 pending invites.	0 fallback uses.	Rising Hills Realty Group workspace under review.	Live checks use local credentials only.

Security review checklist

8 of 9

Use this before disabling demo access or inviting a real brokerage into daily operations.

Ready — Named Hub users
1 active Hub user(s) and 0 pending invite(s) are configured for this client.
Open users

Ready — Live session checks
The private release gate signs in through /hub/login, verifies session and CSRF cookies, opens protected pages, logs out, and confirms access is blocked afterward.
Review access

Ready — CSRF-protected writes
Session-authenticated write routes require the Hub CSRF token. The private gate verifies CRM sync rejects a POST without the token.
Open integrations

Ready — Client isolation
Restricted broker sessions are re-scoped to their own client for lead API and CSV exports, with out-of-scope client detail access denied.
Open leads

Ready — Agent boundary
Agent sessions only expose their assigned portal and are blocked from protected broker admin screens in the live session gate.
Agent portal

Ready — Shared fallback phase-out
Shared Basic Auth fallback is disabled; admin access requires named Hub session sign-in.
Open launch

Ready — Secret handling
Passcodes and CRM/API credentials stay in Worker secrets or private local notes, not public docs or source. Demo gates scan for accidental credential leaks.
Access plan

Ready — CRM credential approval
0 CRM destinations approved for production handoff. Approval is checked before final launch handoff.
Open integrations

Review — Formal review
A third-party security review is still recommended before onboarding unrelated real brokerages into one production deployment.
Handoff

EXTERNAL AUDIT READINESS

Security Review Packet

Download security packet

Copy or download the protected review packet before a third-party security review, owner approval, or named-access cutover.

```
Rising Hills Realty Group ARES External Security Review Packet
Generated 2026-07-20T16:23:58.167Z

Purpose:
Use this protected packet to prepare an external security reviewer, owner, or launch approver before broad multi-client production onboarding.

Workspace under review:
Client: Rising Hills Realty Group
Client ID: client_rising_hills
Primary domain: usealres.com/rising-hills
Plan/support: Scale & Agent Growth / Scale & Agent Growth
Launch status: Demo ready
Enabled modules: lead_hub, curated_listings, routing
Current reviewer context: Owner (hub_user)
Access mode: Named Hub sessions only
```

Copy security packet | Download text packet

PRIVACY OPERATIONS

Retention and deletion readiness

Download privacy packet

Copy or download the protected privacy operations packet before confirming retention periods, deletion workflow, incident-response ownership, and CRM/export boundaries.

```
Rising Hills Realty Group ARES Privacy Operations Packet
Generated 2026-07-20T16:23:58.167Z

Purpose:
Use this protected packet to review data retention, deletion handling, privacy notice alignment, CRM/export boundaries, and incident-response ownership before paid production use.

Workspace summary:
Client: Rising Hills Realty Group
Client ID: client_rising_hills
Primary domain: usealres.com/rising-hills
Support package: Scale & Agent Growth
Support owner/email: support@usealres.com
Launch status: Demo ready
Access mode: Named Hub sessions only
Enabled modules: lead_hub, curated_listings, routing
```

Copy privacy packet | Download text packet

PRIVACY OPERATIONS

Privacy Request Log

0 open · 0 overdue

Record access, correction, export, restriction, and deletion requests so the first paid workspace has a visible retention/deletion workflow before automation exists.

0	0	0	None
Recorded	Open	Overdue	Latest
Client privacy/access/deletion requests.	Requests not completed, denied, or archived.	Open requests past due.	Most recent request date.

Open privacy request queue | Export request CSV

Record privacy request

Request type: Deletion request
Status: Received
Requester name: Jane Client
Requester email: email hidden
Related lead ID: Optional lead id
Owner: ARES operator or brokerage owner
Requested date: 07/20/2026
Due date: 08/03/2026
Data scope: Lead record, journey context, notes, export history, CRM delivery logs, registration visitor record, etc.
Resolution notes: Identity checked, data located, deletion/export/correction action required, exceptions, archive proof.
Archive location: Launch Artifact Vault, client folder, ticket URL, etc.

Record privacy request

No privacy requests have been recorded for this client yet.

CLIENT ISOLATION ROUTE COVERAGE MATRIX

Know which Hub surfaces are scoped before client access

8 of 10

This matrix turns client isolation into launch evidence: route groups, guard pattern, proof source, and anything that must be watched as new modules are added.

- **Broker dashboards and launch proof** — covered
  /admin/dashboard, /admin/launch, /admin/paid-readiness, /admin/handoff, /admin/launch-packet, /admin/artifacts?client_id=client_rising_hills
  Guard: resolveAdminClientScope plus scopedAdminUrl keeps restricted broker sessions inside their assigned client.
  Proof: Protected page health checks, launch packets, and client-scope smoke tests.
- **Lead inbox, lead detail, and exports** — covered
  /admin/leads, /admin/leads/:id, /api/leads, /api/admin/leads/:id/audit-packet.txt
  Guard: Lead list, detail, JSON, CSV, and audit packet queries are client-scoped and deny out-of-scope detail access.
  Proof: check:client-isolation verifies scoped lead reads, CSV export boundaries, and not-found behavior.
- **Client settings and launch configuration** — covered
  /admin/settings/clients, /admin/scope-lock, /api/admin/launch-intake-tasks, /api/admin/client-launch-proof-verifications
  Guard: Owner/broker-admin routes use client scope resolution; writes use resolveWritableClientId or owner-only handlers.
  Proof: Auth hardening source assertions and protected launch packet coverage.
- **Agents, routing, Smart Lists, and follow-up** — covered
  /admin/settings/agents, /admin/routing, /admin/smart-lists, /admin/follow-up
  Guard: Client-specific configuration and queue operations are filtered by client_id and protected behind admin roles.
  Proof: Authenticated health markers cover each surface and client-scoped URLs preserve the selected workspace.
- **CRM imports, approvals, and packets** — covered
  /admin/imports, /admin/import-presets, /api/admin/import-*, /api/admin/first-sample-run-packet.txt
  Guard: Import/rehearsal/approval/execution/packet routes resolve the selected client and keep real sample work behind protected admin access.
  Proof: Signed-out packet boundaries, source checks, and guided sample-run smoke coverage.
- **Hub users and permission presets** — covered
  /admin/settings/users, /api/admin/hub-permission-presets, /api/admin/client-access-invite-decision, /api/admin/access-cutover-packet.txt, /api/admin/client-access-finalization-packet.txt
  Guard: Owner-only management for sensitive access changes; broker admin/reviewer visibility remains role-scoped.
  Proof: Access cutover packet, owner session proof, fallback removal gate, and session-auth smoke tests.
- **Agent portal** — covered
  /agent/leads, /agent/listings, /agent/profile
  Guard: Agent sessions resolve agent identity; expose only assigned/team-visible leads, and are blocked from broker admin pages.
  Proof: Private gate signs in as Mary Grace and expects admin dashboard access to return 403.
- **Privacy, credentials, and security packets** — covered
  /admin/privacy, /admin/security, /admin/credential-review, /api/admin/privacy-*, /api/admin/security-review-packet.txt
  Guard: Protected broker-admin/owner access with client-scoped exports and packet downloads.
  Proof: Demo links require signed-out 401 boundaries and health markers on privacy/security surfaces.
- **Public site and sales collateral** — guarded
  /, /lead-hub/, /rising-hills/, /sales-deck/*
  Guard: Public pages are indexable or noindex as appropriate and must not expose private Hub credentials or personal routing emails.
  Proof: Public safety and demo link checks cover public pages and protected-link boundaries.
- **Future custom modules** — watch
  New client-specific modules, third-party APIs, or custom dashboards
  Guard: Must be added to source assertions, route coverage, signed-out boundary checks, and live smoke before client launch.
  Proof: Roadmap update rule requires new full updates to refresh this coverage and the internal MD.

```
Rising Hills Realty Group client isolation route coverage matrix

Covered route groups: 8 of 10.
Client under review: Rising Hills Realty Group (client_rising_hills).

Coverage rows:
1. [covered] Broker dashboards and launch proof
   Routes: /admin/dashboard, /admin/launch, /admin/paid-readiness, /admin/handoff, /admin/launch-packet, /admin/artifacts?client_id=client_rising_hills
   Guard: resolveAdminClientScope plus scopedAdminUrl keeps restricted broker sessions inside their assigned client.
   Proof: Protected page health checks, launch packets, and client-scope smoke tests.
2. [covered] Lead inbox, lead detail, and exports
   Routes: /admin/leads, /admin/leads/:id, /api/leads, /api/admin/leads/:id/audit-packet.txt
   Guard: Lead list, detail, JSON, CSV, and audit packet queries are client-scoped and deny out-of-scope detail access.
   Proof: check:client-isolation verifies scoped lead reads, CSV export boundaries, and not-found behavior.
3. [covered] Client settings and launch configuration
   Routes: /admin/settings/clients, /admin/scope-lock, /api/admin/launch-intake-tasks, /api/admin/client-launch-proof-verifications
   Guard: Owner/broker-admin routes use client scope resolution; writes use resolveWritableClientId or owner-only handlers.
   Proof: Auth hardening source assertions and protected launch packet coverage.
```

Copy route coverage | Download isolation packet | Open artifact vault

Coverage rule:
every new protected Hub route, export, packet, write endpoint, agent surface, or client module must be added here and to the live gates before paid-client access.

Client Isolation Proof Record

Scoped

Copy this into launch notes before giving a brokerage named access to its workspace.

```
Rising Hills Realty Group client isolation proof record

Purpose: document that a restricted brokerage session is scoped to its assigned workspace before named client access is handed over.

Proof covered by current gates:
- Source guard: resolveAdminClientScope re-scopes restricted broker sessions to the signed-in client.
- Source guard: resolveWritableClientId blocks cross-client form/API writes for restricted sessions.
- Lead detail guard: out-of-scope lead detail returns the client-scope not-found message.
- Lead list/API guard: restricted broker sessions use scoped URLs for Lead Inbox, API list, and CSV export.
- Configuration guard: clients, agents, routing, registration, Smart Lists, templates, follow-up, imports, and user setup use client write guards.
- Agent boundary guard: agent sessions are blocked from broker admin screens.
- Live session guard: prpm demo:session verifies client scope, denied out-of-scope access, CSRF rejection, logout, and agent admin denial.

Route coverage matrix:
1. [covered] Broker dashboards and launch proof: /admin/dashboard, /admin/launch, /admin/paid-readiness, /admin/handoff, /admin/launch-packet, /admin/artifacts?client_id=client_rising_hills. Guard: resolveAdminClientScope plus scopedAdminUrl keeps restricted broker sessions inside their assigned client. Proof: Protected page health checks, launch packets, and client-scope smoke tests.
2. [covered] Lead inbox, lead detail, and exports: /admin/leads, /admin/leads/:id, /api/leads, /api/admin/leads/:id/audit-packet.txt. Guard: Lead list, detail, JSON, CSV, and audit packet queries are client-scoped and deny out-of-scope access. Proof: check:client-isolation verifies scoped lead reads, CSV export boundaries, and not-found behavior.
3. [covered] Client settings and launch configuration: /admin/settings/clients, /admin/scope-lock, /api/admin/launch-intake-tasks, /api/admin/client-launch-proof-verifications
```

Copy isolation proof | Download isolation packet | Open artifact vault | Open Hub users

Private release gate commands

Local only

These checks document what the current demo package proves without exposing credentials in public docs.

```
pnpm check:secret-hygiene
pnpm check:auth-hardening
pnpm check:client-isolation
pnpm demo:session --' --base-url=https://usealres.com
pnpm demo:monday:private
```

Copy security checks

CLIENT PIPELINE

Meeting Follow-Up Tracker

Track demo conversations, decision owners, next touches, proposal status, and launch-scope follow-up in the same Hub used to operate the client workspace.

Dashboard | Launch wizard | Follow-up email | Proposal builder | Export decision tracker CSV | Download approval packet

Client: Rising Hills Realty Group — Open tracker

2	2	1	2	0	0
Tracked conversations Client meetings and follow-up opportunities.	**Open follow-ups** Active conversations waiting on a next action.	**Proposal path** Needs proposal, proposal sent, or proposal follow-up.	**Overdue** Next follow-up date has passed.	**Due this week** Follow-ups scheduled in the next seven days.	**Won** Accepted or converted opportunities.

DECISION FOLLOW-UP DUE

No decision follow-up due

Open Meeting Tracker

Use this after the recap/proposal packet goes out so approval-path conversations do not stall in email.

No proposal or post-call packet follow-up is overdue, due this week, or missing a decision date.

MONDAY SEND PACKAGE

Send it, show it, then log it.

Open Demo Assets

Keep the client-facing package connected to the protected follow-up record so Monday does not depend on memory or browser tabs.

- Open — **Client Email Landing Page** — Send this as the only required pre-call link.
- Open — **Walkthrough Expectations** — Use as a soft agenda if the client asks what to expect.
- Open — **Final Send Packet** — Use for subject line, link order, and copy-ready send notes.
- Open — **Email Finalizer** — Create the pre-call invite or post-call recap.
- Open — **What You Get** — Use as the post-demo leave-behind.
- Open — **Record outcome** — After sending or presenting, log the durable Hub status.

Operating rule:
send the Client Email Landing Page before the call, screen-share the protected Hub live, then record the actual outcome in this tracker.

MEETING DECISION CHECKLIST BRIDGE

Carry the demo close into follow-up

Open Demo Decision Checklist

Use this after the walkthrough to keep the four demo-close decisions attached to the tracked meeting, proposal path, CRM boundary, and access owner.

01 **First launch surface**
Community site, brokerage OS, agent-growth rollout, or CRM/import pilot?
2 tracked conversation(s); latest stage is Demo scheduled.
Open Scope Lock

02 **Package and support tier**
Which initial build and recurring support package should the proposal assume?
Latest proposal track: Community Launch.
Open Proposal Builder

03 **CRM sample path**
Request one safe export sample now, or hold CRM work until after the first launch?
1 proposal-path conversation(s) are active; use CRM only when the sample path is approved.
Open CRM Imports

04 **Named access owner**
Who owns Hub access, roster cleanup, support cadence, and final go-live approval?
Managing broker / launch sponsor; next follow-up: Jul 6, 6:00 PM.
Open Hub Users

Client demo decision bridge
Client: Rising Hills Realty Group
Latest conversation: Monday working demo walkthrough
Decision owner: Managing broker / launch sponsor
Next follow-up: Jul 6, 6:00 PM

- First launch surface: Community site, brokerage OS, agent-growth rollout, or CRM/import pilot? Proof: 2 tracked conversation(s); latest stage is Demo scheduled.
- Package and support tier: Which initial build and recurring support package should the proposal assume? Proof: Latest proposal track: Community Launch.

Copy decision bridge | Export decision tracker CSV

Operating rule:
record the meeting owner and next follow-up here before sending proposal, CRM sample request, or named Hub access.

MONDAY CALL OUTCOME — Interested

Durable Monday outcome record

Record the real send/call milestone here after using the Demo Snapshot or Email Finalizer. This is the Hub record that replaces browser-local reminders.

Monday working demo walkthrough
Send recap email, confirm first community launch scope, and ask for roster, listing links, routing rules, CRM/export needs, and approval timing.
Stage: Demo scheduled · Status: Open · Next: Jul 6, 6:00 PM

Outcome: Interested — Save outcome

ONE-CLICK DURABLE OUTCOMES

Client email sent | Recap sent / waiting | Post-call packet sent | Decision Room sent | Proposal sent

Demo workflow:
send the client-safe email, click Client email sent, run the walkthrough, then record Recap sent, Post-call packet sent, Decision Room sent, or Proposal sent as the conversation advances.

PROPOSAL PACKET STATUS BRIDGE — Prepare

Proposal packet not ready yet

Finish the recap, Decision Room, launch focus, support tier, CRM/export boundary, and approval owner before sending the proposal packet.

Interested durable proposal outcome | **Community Launch** proposal track | **Managing broker / launch sponsor** approval owner | **Jul 6, 6:00 PM** decision follow-up

Open Proposal Builder | Open Proposal PDF View | Download approval packet | Open Approval Room | Record in Meeting Tracker

Mark proposal packet sent

Hub bridge:
Use the Decision Room and Meeting Tracker to align scope before marking proposal delivery.

Add client follow-up

Use this right after a demo call to keep the proposal and next touch from disappearing into email.

Title: Monday working demo walkthrough
Contact name: Managing Broker
Contact email: email hidden
Company: Rising Hills Realty Group
Meeting date: mm/dd/yyyy, --:-- --
Next follow-up: mm/dd/yyyy, --:-- --
Status: Open
Stage: Demo completed
Proposal track: Community Launch
Decision owner: Managing broker / launch sponsor
Estimated value: $12k-$18k + monthly support
Next step: Send recap, confirm launch scope, and request roster/listing/routing inputs.
Notes: What resonated, objections, approval path, package fit, CRM/export needs, and promised follow-up.

Add follow-up

How to use it after Monday

Log the client conversation before sending the recap.
Set the next follow-up date and decision owner.
Move the stage from demo completed to proposal needed or proposal sent.
Use Proposal Builder and CRM Worksheet links while the scope is still fresh.

Current follow-up queue

2

Rising Hills Realty Group conversations, proposal steps, and launch-scope decisions.

Monday working demo walkthrough

Rising Hills Realty Group · Managing Broker — Demo scheduled | Open | Next Jul 6, 6:00 PM

Quick outcome — Call outcome: Interested

Client: Rising Hills Realty Group
Title: Monday working demo walkthrough
Contact name: Managing Broker
Contact email: email hidden
Company: Rising Hills Realty Group
Meeting date: 07/06/2026, 02:00 PM
Next follow-up: 07/06/2026, 06:00 PM
Status: Open
Stage: Demo scheduled
Proposal track: Community Launch
Decision owner: Managing broker / launch sponsor
Estimated value: $12k-$18k build + Core Operations support
Next step: Send recap email, confirm first community launch scope, and ask for roster, listing links, routing rules, CRM/export needs, and approval timing.
Notes: Use Working Demo as the one client link before the call. Screen-share the protected Hub live, then move into proposal review if Rising Hills feels like the right first-launch model.

Next step
Send recap email, confirm first community launch scope, and ask for roster, listing links, routing rules, CRM/export needs, and approval timing.
Use Working Demo as the one client link before the call. Screen-share the protected Hub live, then move into proposal review if Rising Hills feels like the right first-launch model.

Client dashboard | Proposal builder | Save follow-up | Archive | Save quick outcome

Client email sent | Recap sent / waiting | Decision Room sent | Proposal sent

Proposal scope review

Rising Hills Realty Group · Managing Broker — Proposal needed | Open | Next Jul 8, 2:00 PM

Quick outcome — Call outcome: Send proposal

Client: Rising Hills Realty Group
Title: Proposal scope review
Contact name: Managing Broker
Contact email: email hidden
Company: Rising Hills Realty Group
Meeting date: mm/dd/yyyy, --:-- --
Next follow-up: 07/08/2026, 02:00 PM
Status: Open
Stage: Proposal needed
Proposal track: Community Launch
Decision owner: Managing broker / launch sponsor
Estimated value: $12k-$18k build + $299-$499/mo support
Next step: Prepare approval packet with launch focus, success metric, access model, CRM/export boundary, support tier, and target launch window.
Notes: Use Proposal Builder and CRM Discovery Worksheet after the demo. Keep CRM/API sync positioned as a scoped follow-on after CSV/export proof.

Next step
Prepare approval packet with launch focus, success metric, access model, CRM/export boundary, support tier, and target launch window.
Use Proposal Builder and CRM Discovery Worksheet after the demo. Keep CRM/API sync positioned as a scoped follow-on after CSV/export proof.

Client dashboard | Proposal builder | Save follow-up | Archive | Save quick outcome

Client email sent | Recap sent / waiting | Decision Room sent | Proposal sent

BROKERAGE OPERATIONS

Smart Lists

Save reusable follow-up queues for each brokerage, agent, team membership, project, priority, or SLA risk.

Client: Rising Hills Realty Group | View client

SMART LIST MANAGER SUMMARY

Broker queue command center

10

Scan playbook compliance before opening individual saved queues.

TOTAL QUEUED LEADS	QUEUES IN ESCALATION	QUEUES AT SLA RISK	NEEDS REVIEW	ON-TRACK QUEUES
10	2	0	0	0
across active Smart Lists	broker review now	clear	ownership or priority watch	no immediate exceptions

Manager focus

Rising Hills Walk-Ins — Open focus queue
Escalation watch · Playbook escalation rule may be active. Review owner, priority, and overdue follow-up now.

Inside Sales First Response — Open focus queue
Escalation watch · Playbook escalation rule may be active. Review owner, priority, and overdue follow-up now.

Broker Daily Digest Preview — Preview digest
Plain-English morning summary generated from Smart List queue health and playbook compliance.

Saved views

Rising Hills Walk-Ins

Rising Hills · Agent shared · owner: Brokerage · status: New, Assigned, Contacted, Appointment Set, Nurture · keyword: Rising Hills · source: On Site Registration

8 | Agent shared | Brokerage | Owner and team notified | agent visible | active

NOTIFICATION SUMMARY	OWNER	TEAM	RECIPIENTS	LAST DELIVERY	AVAILABLE ACTIONS
Owner and team notified	Brokerage	No team queue	No deliverable recipients	No recipients	Test only

QUEUE PLAYBOOK

First response within 15 minutes during business hours.

OWNER RESPONSIBILITY: Queue owner reviews new matches, assigns clear ownership, and keeps follow-up status current.

SUGGESTED NEXT ACTION: Open the highest-risk health tile, contact the lead, then update status or create the next follow-up task.

ESCALATION RULE: Escalate to the broker/admin team when a high-priority lead is unassigned or overdue at end of day.

Playbook template: Choose template | Apply template

PLAYBOOK COMPLIANCE

Compliance status: Escalation watch
Playbook escalation rule may be active. Review owner, priority, and overdue follow-up now.

SLA FOCUS	ESCALATION FOCUS	NEXT ACTION
4	3	2
Needs first contact	Overdue follow-up	High priority

QUEUE HEALTH	NEEDS FIRST CONTACT	OVERDUE FOLLOW-UP	DUE TODAY	UNASSIGNED	HIGH PRIORITY
6	4	3	5	0	2
matching leads	broker attention	follow-up risk	action today	covered	watch closely

QUEUE PREVIEW

6 matching leads

- **Rising Hills Visitor** — Rising Hills Model Home · Rising Hills · Rising Hills Model Home — Assigned · Normal · Emma Reed · 1 open task · 1 due today
- **Rising Hills Visitor** — Rising Hills Model Home · Rising Hills · Rising Hills Model Home — Assigned · Normal · Emma Reed · 1 open task · 1 due today
- **Maya Bennett** — Rising Hills Model Home · Rising Hills · Rising Hills Model Home — New · High · Emma Reed · 1 open task · 1 due today

Open full queue

▸ Transfer notification recipient preview
▸ Email preview copy
▸ Activity and notification history

Name: Rising Hills Walk-Ins
Client: Rising Hills Realty Group
Description: Rising Hills QR registrations from the model home, open houses, and sales cent
Sort order: 8
Sharing: Agent-visible queue
Queue owner: Brokerage / admin team
Team access: No team restriction
Team label: Inside sales, listing team, weekend duty
Transfer notifications: Owner and team
Project or listing keyword: Rising Hills
Intent key: Any intent
Source type: On-site registration
Assigned to: Any assignee

Queue playbook
First response SLA: First response within 15 minutes during business hours.
Owner responsibility: Queue owner reviews new matches, assigns clear ownership, and keeps follo
Suggested next action: Open the highest-risk health tile, contact the lead, then update status or create the next follow-up task.
Escalation rule: Escalate to the broker/admin team when a high-priority lead is unassigned or overdue at end of day.

Lead status
- [x] New
- [x] Contacted
- [x] Nurture
- [ ] Lost
- [x] Assigned
- [x] Appointment Set
- [ ] Closed
- [ ] Archived

Priority and timing
- [ ] Normal
- [ ] Urgent
- [ ] Overdue task
- [ ] High
- [ ] No first contact
- [ ] Task due today

- [x] Active
- [x] Show in agent portals

Queue owner controls broker accountability and ownership transfer. Team queue access uses actual team membership when Sharing is set to Team queue and "Show in agent portals" is enabled; Transfer notifications control who gets emailed when ownership changes.

View leads | Update smart list | Archive smart list

Inside Sales First Response

Rising Hills · Team · owner: Brokerage · team: Inside Sales · Inside Sales · status: New, Assigned · no first contact

18 | Team | Brokerage | Inside Sales | Inside Sales | Owner and team notified | agent visible | active

Add smart list

Name: High-intent Oak Hill buyers
Client: Rising Hills Realty Group
Description: What this queue is used for
Sort order: 50
Sharing: Broker queue
Queue owner: Brokerage / admin team
Team access: No team restriction
Team label: Inside sales, listing team, weekend duty
Transfer notifications: Owner and team
Project or listing keyword: Oak Hill, Rising Hills, valuation
Intent key: Any intent
Source type: Any source
Assigned to: Any assignee

Queue playbook
First response SLA: First response within 15 minutes during business hours.
Owner responsibility: Who owns review, assignment, and follow-up status.
Suggested next action: What the broker or agent should do when this queue has activity.
Escalation rule: When this queue should be escalated to broker/admin leadership.

Lead status
- [ ] New
- [ ] Contacted
- [ ] Nurture
- [ ] Lost
- [ ] Assigned
- [ ] Appointment Set
- [ ] Closed
- [ ] Archived

Priority and timing
- [ ] Normal
- [ ] Urgent
- [ ] Overdue task
- [ ] High
- [ ] No first contact
- [ ] Task due today

- [x] Active
- [ ] Show in agent portals

Queue owner controls broker accountability and ownership transfer. Team queue access uses actual team membership when Sharing is set to Team queue and "Show in agent portals" is enabled; Transfer notifications control who gets emailed when ownership changes.

Add smart list

PROJECT ROUTING

Routing

Assign future leads by project, community, listing, source, intent, or page match.

Client

Rising Hills Realty Group | View client

Active routing rules

No routing rules configured yet.

Add project routing

Rule name
Oak Hill leads to Mary Grace

Client
Rising Hills Realty Group

Listing or community match
Select known listing/community or type custom keyword

Assign to
Select agent or team

Lead priority
Normal

Rule order
30

Status
Enabled

Known routing matches

- Rising Hills | Registration community
- Rising Hills Model Home | Registration listing
- Rising Hills Welcome Center | Registration property
- on_site_registration | Recent lead intent
- model_home_registration | Recent lead intent
- downsizing_consultation | Recent lead intent
- design_center_follow_up | Recent lead intent
- quick_move_in | Recent lead intent
- Seller valuation | Common intent
- Buyer consultation | Common intent
- Tour request | Common intent

Add routing rule

BROKERAGE SETUP

Agents

Demo brokerage roster for routing, team membership, smart lists, and follow-up ownership.

Client

Rising Hills Realty Group | View client

Team queues and membership

Use teams to model inside sales, listing specialists, weekend duty, or launch pods before routing and Smart Lists become fully permission-aware.

Inside Sales
Rising Hills · Emma Reed
Sort 10 | 1 member | active

Listing Specialists
Rising Hills · Caleb Stone
Sort 20 | 1 member | active

Add team

Team name: Inside Sales

Client: Rising Hills Realty Group

Description: Who owns this queue and when to use it

Sort order: 50

Team members

- [ ] Caleb Stone
- [ ] Emma Reed

- [x] Active team

Team membership is the foundation for future team queues, ownership transfer notifications, and permission-aware Smart Lists.

Add team

Current roster

Caleb Stone
Rising Hills · email hidden
Sales center lead | active

Emma Reed
Rising Hills · email hidden
Community specialist | active

Add agent

Name: Alex Carter

Client: Rising Hills Realty Group

Email: email hidden

Phone: (phone hidden

Role: Buyer specialist

Call scheduling URL: https://calendly.com/alex/call

Tour scheduling URL: https://calendly.com/alex/tour

Calendar provider: Calendly, Cal.com, Google Calendar

Preferred greeting: Hi {{lead_name}},

Follow-up signature: Mary Grace, AIRES Realty

- [x] Task reminders

Reminder window: 60

Markets served: Downtown, Midtown, Oak Hill

Lead types: buyer_consultation,tour_request,seller_consultation

Specialties: First-time buyers, luxury listings, seller valuation

Writing style: Warm, concise, consultative, luxury but not pushy.

Notification email: Defaults to agent email

Profile URL: https://example.com/agents/alex

Add agent

Hub users

Hub users

Hub Users

Hub Users

CLIENT ONBOARDING

Brokerage Setup

Capture the information AIRES needs to configure agents, routing, lead destinations, and follow-up language.

Client

Rising Hills Realty Group | View client

AI ONBOARDING OPPORTUNITY

Build the first version of a brokerage workflow in minutes.

Paste a roster, listings, markets, and routing preferences once. AIRES can turn that intake into draft routing rules, agent portals, and follow-up templates without waiting on a developer.

1. **Capture roster, listings, and routing preferences.**
2. **Generate suggested lead routes and ownership rules.**
3. **Launch agent portals and starter follow-up language.**

Recent intakes

No brokerage intakes saved yet.

New brokerage intake

Client
Rising Hills Realty Group

Brokerage name
Example Realty Group

Website
https://example.com

Admin name
Jordan Taylor

Admin email
email hidden

Admin phone
(phone hidden

CRM
Follow Up Boss, HubSpot, none

Markets served
Cities, neighborhoods, communities, or ZIP codes

Lead destinations
Admin email, agent emails, CRM webhook, Slack, etc.

Project routing options

- [ ] Route by agent ownership
- [ ] Route by market or ZIP
- [ ] Route by listing or community
- [ ] Route by lead type
- [ ] Route by price range
- [ ] Round robin distribution
- [ ] Route by agent availability
- [ ] Send to CRM or webhook

Agents
One per line: Name, email, phone, specialty, market

Listings and communities
One per line: listing/community, assigned agent/team, notes

Routing notes
Example: Oak Hill leads to Mary Grace; buyer leads under $600k to Alex; seller valuation leads to Nina.

Auto-reply tone
Warm, luxury, concise, builder sales, etc.

Save onboarding

AI **AIRES Lead Hub**
AGENT PORTAL · POWERED BY AIRES

Public site | Lead Hub page | Sign out

AGENT PORTAL

Mary Grace

Your assigned AIRES leads and follow-up queue.

My Leads | My Featured Listings | My Profile

Active 1 | New 1 | High priority 1 | No first contact 1 | Tasks 1 | Overdue 1 | Closed/lost 0 | All 1

Walk-In / On-Site Registrations 0 | Seller leads needing first touch 0 | Inside Sales First Response 1 | Oak Hill high-intent buyers 1

Mary Grace overdue follow-ups 1

Mary Oak Hill Buyers 1

Search leads

Name, email, listing, community | Search

My private queues
Save personal follow-up views without changing the brokerage-wide Smart Lists.

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LEAD	SOURCE	STATUS	PRIORITY	RECEIVED
Avery Morgan email hidden · (phone hidden Oak Hill Residence HIGH **High lead asked about Oak Hill Residence.** **1 task · overdue** Schedule Oak Hill tour · Due Jun 27, 5:32 PM Edit next task Complete task Add follow-up task	Mary Grace agent demo /mary-grace/listings/oak-hill-residence/	new	high	Jun 26, 5:32 PM

Hub support: support@useaires.com