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

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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<br>email hidden<br>AIRES Demo<br>First Community Launch<br>Demo intent: First launch scope<br>Launch intake: Community website<br>WARM<br>Warm launch-intake lead requested Community website for Rising Hills Monday launch proof.<br>View journey | AIRES contact form<br>/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

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

Signed in as Operations Lead

# Rising Hills Realty Group

Jessika Lund-King · Sole Trader & Agent Growth · Demo reality

Sold to Sold Lists | Sold to Sold Lists | Brokerage Leads | Leads | Agents | Pending

| 6 | 0 | 2 | 0 | 0 | 0 | 0 |
|---|---|---|---|---|---|---|
| Total leads | Active leads | Agents | Listings | Reading rules | Invites |
| 6 total · 0 this week | 0 active · 0 expiring soon | 2 active · 0 pending | 0 active · 0 sold | 0 active · 0 disabled | 0 pending · 0 expiring soon |

4 of 8

## Where Rising Hills Realty Group stands

This is the criteria platform staff offer Rising Hills Realty Group. Which unlocks a workspace. It runs the dashboard presents who one client is about to decide.

| Setup | Sold lists | Brokerage leads | Agents | Pending |
|---|---|---|---|---|
| 60% complete | 0 of 10 | 0 of 10 | 2 of 10 | 0 of 10 |
| Workspace created · Workspace setup · Brokerage profile · Brand · Sole Trader · Agent Growth · Sold lists · Brokerage leads · Agents · Pending | Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists | Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads | Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents | Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending |

Profile complete · Brand complete · Sole Trader · Agent Growth · Sold lists · Brokerage leads · Agents · Pending

Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists · Sold lists

Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads · Brokerage leads

Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents · Agents

Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending · Pending

Workspace created · Workspace setup · Brand · Sole Trader · Agent Growth · Sold lists · Brokerage leads · Agents

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

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- 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

useaires.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 tester 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 ARIES External Security Review Packet
Generated 2026-07-20T16:25:19.725Z

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: useaires.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

Current readiness signals:
```

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 ARIES Privacy Operations Packet
Generated 2026-07-20T16:25:19.725Z

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: useaires.com/rising-hills
Support package: Scale & Agent Growth
Support owner/email: support@useaires.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: ARIES 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** — /admin/dashboard, /admin/launch, /admin/paid-readiness, /admin/handoff, /admin/launch-packet, /admin/artifacts?client_id=client_rising_hills — covered
  Guard: resolveAdminClientScope plus scopeAdminUrl 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** — /admin/leads, /admin/leads/:id, /api/leads, /api/admin/leads/:id/audit-packet.txt — covered
  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** — /admin/settings/clients, /admin/scope-lock, /api/admin/launch-intake-tasks, /api/admin/client-launch-proof-verifications — covered
  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** — /admin/settings/agents, /admin/routing, /admin/smart-lists, /admin/follow-up — covered
  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** — /admin/imports, /admin/import-presets, /api/admin/import-*, /api/admin/first-sample-run-packet.txt — covered
  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** — /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 — covered
  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** — /agent/leads, /agent/listings, /agent/profile — covered
  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** — /admin/privacy, /admin/security, /admin/credential-review, /api/admin/privacy-*, /api/admin/security-review-packet.txt — covered
  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** — /_lead-hub/_rising-hills/_sales-deck/* — guarded
  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** — New client-specific modules, third-party APIs, or custom dashboards — watch
  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 scopeAdminUrl 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 error.
- 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 scopeAdminUrl 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://useaires.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.

1

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

Hub support: support@useaires.com