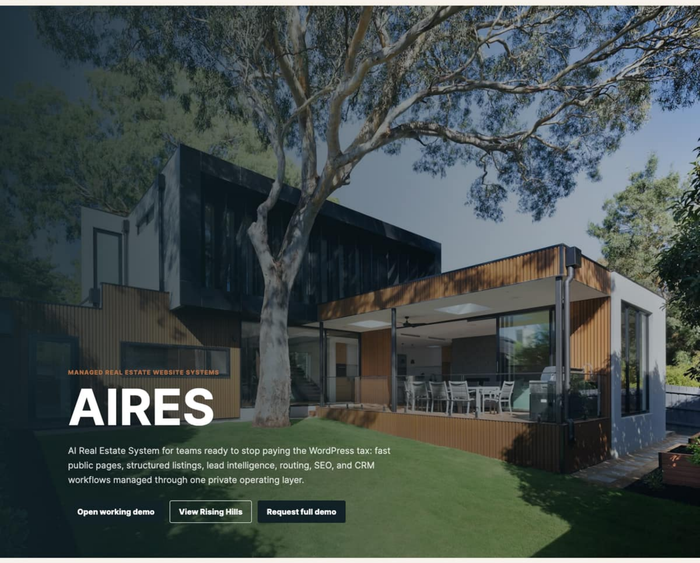


MANAGED REAL ESTATE WEBSITE SYSTEMS

AIRES

AI Real Estate System for teams ready to stop paying the WordPress tax: fast public pages, structured listings, lead intelligence, routing, SEO, and CRM workflows managed through one private operating layer.

Open working demo | View Rising Hills | Request full demo

THE PROBLEM

Real estate sites are carrying too much operational drag.

Homebuilders and brokerages need curated listing cards, lead forms, neighborhood content, incentives, maps, agent pages, and CRM routing. Those workflows often get scattered across disconnected tools that are hard to test, preview, and maintain.

- Tool conflicts
- Plugin updates and security risk
- Manual inventory edits
- Unclear CRM routing
- Slow preview cycles

THE REPLACEMENT

A static public site plus a private operating layer for the work behind it.

01	02	03	04	05
Structured content	Reusable modules	Review preview	Managed launch	Lead routing

WORKING DEMO

Start with one clean link.

The Working Demo gives prospects the short pre-call path: review the Rising Hills public site, understand the Lead Hub operating layer, and bring one real launch idea before the private Hub is shown live.

01 Open the Working Demo
02 Explore the Rising Hills case study
03 Review the Lead Hub overview
04 Optional detailed demo guide
05 Scope a first launch privately
06 Request the full demo walkthrough

ANTI-WORDPRESS

Fast public pages without plugin bloat.

AIRES keeps the buyer-facing site lean and edge-hosted, while the private workflow handles updates, approvals, lead capture, and routing.

ZERO-DROPPED LEADS

Context travels with every inquiry.

Lead Hub preserves source, page, listing, and visitor journey context so agents know what the person cared about before they submitted.

AI-NATIVE

Built for summaries, drafts, and routing.

The system is structured for AI-assisted lead insights, personalized follow-up drafts, and onboarding-driven configuration.

MODULES

Built like a platform, sold like a practical rebuild.

Featured Properties

Replaces: Manual property cards and fragile listing widgets

Does: Renders inventory from structured data with promos, statuses, and community filters.

Example: Quickly publish move-in-ready homes across a homepage and community page.

Spreadsheet imports, content tools, listing feed adapters

Lead Router

Replaces: Disconnected form tools and CRM handoffs

Does: Validates form submissions and routes leads by community, listing, source, and intent.

Example: Send a Harbor Green tour request to the right sales team and backup destination.

Major CRM connections, webhook delivery, retry queues

Communities

Replaces: Templates copied and adjusted by hand

Does: Creates consistent community pages from location, amenity, school, map, and inventory data.

Example: Launch a new neighborhood page without rebuilding the design every time.

CMS editing, floor plans, school APIs, amenity maps

INVENTORY DEMO

Featured homes rendered from structured data.

Quick move-in

Rate buy-down available

The Mercer

118 Copper Ridge Way
Greenville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$489,900	Mercer	4	3	2,410

Copper Ridge | Lot 18 | 30-45 days

Incentive | Quick move-in | Trail access

Request info

Under construction

The Ellison

42 Palmetto Garden Dr
Summerville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$542,500	Ellison	5	4	3,020

Palmetto Gardens | Lot 42 | Fall 2026

Large plan | Under construction | Model row

Request info

Model home

Tour this weekend

The Ashton

705 Harbor Green Loop
Wilmington, NC

PRICE	PLAN	BEDS	BATHS	SQ FT
$618,000	Ashton	4	3	2,760

Harbor Green | Model 1 | Tour only

Model home | Coastal | Weekend tour

Request info

Open full inventory demo

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

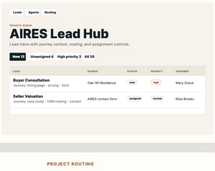
AI Insight: Buyer reviewed Oak Hill listing content before submitting. Prioritize a specific, property-aware follow-up.

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 | Work email

Phone | Brokerage or team

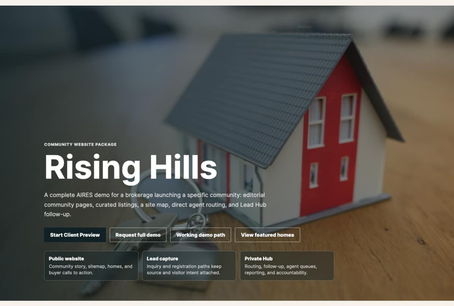
Team size | Primary goal

1-5 agents | 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



COMMUNITY WEBSITE PACKAGE

Rising Hills

A complete AIRES demo for a brokerage launching a specific community: editorial community pages, curated listings, a site map, direct agent routing, and Lead Hub follow-up.

Start Client Preview | Request full demo | Working demo path | View featured homes

Public website
Community story, sitemap, homes, and buyer calls to action.

Lead capture
Inquiry and registration paths keep source and visitor intent attached.

Private Hub
Routing, follow-up, agent queues, reporting, and accountability.

WHAT THE BROKERAGE GETS

A community launch site that stays fast, curated, and easy to manage.

AIRES does not try to rebuild Zillow. The community site becomes the premium branded front door: polished story, high-end listing cards, agent ownership, and tracked handoffs to the portals buyers already use.

Public site
Community story, listings, sitemap, amenities, local context.

Agent tools
Micro-dashboard for leads, featured listings, and profile updates.

Lead Hub
Journey tracking, routing, assignments, AI-drafted follow-up.

FIRST LAUNCH PATH

How Rising Hills becomes a real brokerage rollout.

Use this demo as the first-launch model: one community, the right agents, curated listing links, routing rules, and a support package that can expand after the workflow is proven.

1. **Launch one community**
Start with a focused Rising Hills-style site instead of rebuilding every brokerage workflow at once.

2. **Route real activity**
Connect listing clicks, registration forms, and demo requests to the right agent or team.

3. **Manage follow-up**
Use the Hub to see ownership, stale leads, Smart Lists, tasks, reports, and exports.

4. **Scale the system**
Add agents, listings, communities, CRM handoff, support tiers, and feature flags over time.

CLIENT PREVIEW MODE

A clean public click path before the live walkthrough.

If you only send one pre-call link, send the Working Demo. This page is the Rising Hills example that link points to, with public pages clients can explore before the private Hub workflow is shown live.

1. **Review the community site**
Start with the buyer-facing experience: story, visual sitemap, curated inventory, neighborhood context, and calls to action.
Open Rising Hills

2. **Open visitor registration**
See the public QR-friendly form a model-home, open-house, or event visitor would use to enter the Lead Hub workflow.
Open registration

3. **Read the Lead Hub overview**
Understand the private operating layer without logging in: routing, Smart Lists, agent queues, reporting, and follow-up.
Open Lead Hub

4. **Open the client brief**
Use the short leave-behind to connect the public site, registration capture, Hub workflow, and first-launch scope.
Open brief

5. **Request a launch conversation**
Open the launch-intake form that turns demo interest into a real first-launch scope for a community, listing campaign, routing workflow, or support package.
Open request form

What to expect: Public pages open normally. The private Hub walkthrough is best reviewed live so the lead data, roles, and routing story stay clear.
Open working demo

GUIDED HUB WALKTHROUGH

Walk through the private workflow after the public story lands.

After the client has seen the public preview, use the live walkthrough to show how the private Hub manages real leads, routing, agent ownership, registration visitors, and reporting.

1. **Scan or open the registration form**
Show how a walk-in visitor registers from a phone at the model home.
Open registration form

2. **Review the event workflow**
See how model-home visitors become assigned follow-up opportunities with owner, status, task, and export context.
View Hub preview

3. **Show the clean handoff**
Walk through how visitor leads can become a CSV export, packet, CRM handoff, or agent task list during the live demo.
Review CRM handoff

4. **Work the agent queue**
Review how each assigned agent gets a focused lead queue for follow-up without seeing brokerage-wide settings.
View agent portal

COMMUNITY SITEMAP

One site, six high-value buyer paths.

This is the site structure AIRES would generate and manage for a community like Rising Hills.

Overview
Hero story, community positioning, lifestyle photography

Homesites
Interactive map with lot status, amenities, and sales cues

Listings
Curated inventory cards linking to Zillow, Homes.com, or Realtor.com

Neighborhood
Schools, amenities, dining, commute notes, and local context

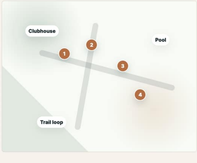
Agents
Assigned brokerage agents with profile pages and direct routing

Lead Hub
Private inbox, journey tracking, routing, and follow-up tools

INTERACTIVE HOMESITE MAP

Inventory and amenities in one visual layer.

Brokerages can show lot availability, model homes, community anchors, and curated listing cards without maintaining a heavy IDX search tool.



CURATED INVENTORY

Featured listings without IDX drag.

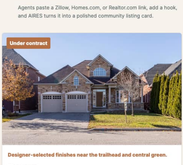
Agents paste a Zillow, Homes.com, or Realtor.com link, add a hook, and AIRES turns it into a polished community listing card.

Finished ridge-view home with private study and covered outdoor living.

The Overlook
104 Summit Trail · Homesite 4

PRICE	BEDS	BATHS	SQFT
$742,000	4	3.5	3,080

Mary Grace — View full history

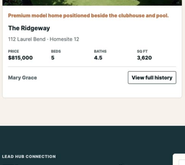


Designer-selected finishes near the trailhead and central green.

The Laurel
107 Summit Trail · Homesite 7

PRICE	BEDS	BATHS	SQFT
$689,500	4	3	2,760

Nina Brooks — View full history

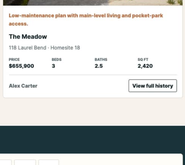


Premium model home positioned beside the clubhouse and pool.

The Ridgeway
112 Laurel Bend · Homesite 12

PRICE	BEDS	BATHS	SQFT
$819,000	5	4.5	3,620

Mary Grace — View full history



Low-maintenance plan with main-level living and pocket-park access.

The Meadow
118 Laurel Bend · Homesite 18

PRICE	BEDS	BATHS	SQFT
$655,900	3	2.5	2,420

Alex Carter — View full history

LEAD HUB CONNECTION

The community site feeds the private operating layer.

Every listing click, map interaction, form start, and inquiry can arrive in the Hub with enough context for the brokerage to act quickly.

AI insight: Buyer viewed The Overlook, clicked full property history, then requested a private tour from the community page.

SOURCE

ASSIGNED

PRIORITY

NEXT STEP

DEMO INQUIRY

Route a Rising Hills lead into the Hub.

This form sends community-specific context so the Hub can show exactly what the buyer looked at and who should follow up.

Name
Jordan Taylor

Email
email hidden

Interest
Private tour at Rising Hills

Message
Tell us which homesite or question you have.

Send Rising Hills inquiry

AIRES WORKING DEMO

One link before the walkthrough.

This is the short client review path for AIRES: start with the Rising Hills public website, understand what the Lead Hub does, then bring one real launch idea to the call.

10-MINUTE PREP

What to do before the call.

1. **3 min: View Rising Hills.**
2. **4 min: Review the Lead Hub overview.**
3. **3 min: Pick one real first-launch use case.**

No Hub login is needed before the walkthrough.
Jackson will screen-share the private Hub live so the dashboard, routing, lead data, agent access, and launch checklist make sense in context.

Start with Rising Hills | Review Lead Hub

Public site first
Review Rising Hills as the example community launch.

Hub explained simply
See how the public website connects to routing and follow-up.

Private screens live
Broker dashboards and protected lead data are screen-shared in context.

ONE-LINK MONDAY PATH

Send one link, show the Hub live, close into one first launch.

This is the cleanest client flow for Monday: reduce the pre-call ask, guide the protected workflow live, then use one post-call recap path to collect the real launch decision.

SEND
Client Email Landing Page
Use one required client-safe starting page before the call. The Monday Demo Link stays inside that page as the primary action or quick fallback.

REVIEW
Rising Hills, Lead Hub, and CRM Pilot
Let them see the public community site, the plain-English Lead Hub overview, and the sample-first CRM boundary.

KNOW
Private Hub live
Screen-share broker dashboard, lead inbox, routing, Smart Lists, agent portal, registration, reports, and launch controls.

SEND
What You Get recap
After the call, send the recap and visual backup so they can forward the system summary internally.

CLOSE
Decision Room
Move the conversation into one first launch, one owner, one CRM/export path, and one support package.

CLIENT CLICK GUIDE

What to open, what to look for, and what it proves.

Use this as the self-guided path before or after the call. The private Hub still works best as a guided screen-share first, but these public pages will make the walkthrough easier to follow.

01 View public website
Open Rising Hills
LOOK FOR
Brand story, community positioning, curated listings, agent presence, registration paths, and buyer/seller calls to action.
WHAT IT PROVES
AIRES can package a specific community or brokerage campaign as a polished public experience instead of a generic IDX search page.

02 Review Hub overview
Open the Lead Hub overview
LOOK FOR
Lead routing, journey context, Smart Lists, agent queues, follow-up tools, reporting, and CRM/export readiness.
WHAT IT PROVES
The website is connected to a private operating layer that helps a brokerage see who followed up, what happened, and what needs attention.

03 Review CRM pilot
Skim the CRM pilot path
LOOK FOR
The six-gate sample path: safe sample, no-write analysis, rehearsal proof, approval, controlled run, and closeout.
WHAT IT PROVES
AIRES can support CRM/export conversations without turning the first demo into a risky full migration project.

04 Review launch plan
Review the first-launch path
LOOK FOR
Community, branding, roster, routing, listings, CRM/export, Hub access, and support expectations.
WHAT IT PROVES
The offer can be scoped around one practical launch plus ongoing operating support, not a generic price sheet.

05 Open request form
Bring one real launch idea
LOOK FOR
A first community, listing campaign, open-house registration flow, agent group, or routing/accountability problem worth testing.
WHAT IT PROVES
The next conversation can move from general demo interest into a specific first launch scope.

WHAT TO CLICK

Use this order before the walkthrough.

The goal is not to memorize every feature. The goal is to see how a public real estate website connects to the private operating layer behind the lead.

1 — 3 minutes
View the Rising Hills website
Start with the public community site: hero story, sitemap concept, curated featured listings, agent context, registration paths, and calls to action.
Open Rising Hills

2 — 4 minutes
Review the Lead Hub overview
See how website inquiries become routed leads with journey context, Smart Lists, agent queues, follow-up workflows, reports, and CRM/export readiness.
Open Lead Hub

3 — 2 minutes
Understand the CRM pilot path
Review how AIRES safely tests CRM/export movement with one small sample before a full export, API credential, or recurring sync.
Open CRM Pilot Path

4 — 3 minutes
Bring one real launch idea
Think about the first community, listing campaign, registration event, agent group, or routing problem that would make the demo useful immediately.
Open request form

WHAT AIRES DOES

A brokerage gets more than a website.

AIRES is designed as a launchable real estate operating system: public site, lead capture, private Hub, agent workflow, reporting, CRM/export readiness, and future multi-client scale.

- Public community website for a specific brokerage, neighborhood, project, or campaign.
- Curated listing cards that can link to Zillow, Homes.com, Realtor.com, or another full listing destination.
- Lead capture forms that preserve visitor journey context before the form is submitted.
- Private Lead Hub inbox with assignment, status, priority, Smart Lists, notes, and follow-up actions.
- Broker accountability dashboard for stale leads, response visibility, agent activity, and launch health.
- Agent portals so each agent can see their own leads without exposing the full brokerage admin.
- Open house, model home, and registration workflows with QR-friendly capture and follow-up queues.
- CRM/export path that begins with a safe sample pilot and later moves into clean CSV presets, webhook, or API sync.

LIVE WALKTHROUGH

What Jackson will screen-share.

The private Hub includes operational screens and demo lead data, so it should be guided live first. After the walkthrough, role-specific access can be created intentionally for brokers, admins, and agents.

- Broker Dashboard Presenter Mode
- Command Center
- Presenter Start Here
- Broker Launch Wizard
- Lead Inbox and Lead Detail
- Visitor Journey Context
- Routing and Project Rules
- Smart Lists
- Agent Portal
- Registration/Event Dashboard
- Reports and CSV Export
- Security Review
- Launch Checklist
- Proposal Packet

BRING TO THE CALL

Three questions make the demo useful fast.

Which community, project, agent group, or listing campaign would you launch first?

Who should own new buyer, seller, registration, and listing leads?

Which CRM, spreadsheet, or reporting process would AIRES need to support?

HELPFUL LINKS

Use these if you want more context.

Detailed Client Demo Guide
A deeper guided review path if you want more detail before or after the walkthrough.
Open

Rising Hills Brief
A short leave-behind that explains the sample community launch and what a brokerage receives.
Open

CRM Pilot Path
A broker-safe explanation of how AIRES proves CRM mapping with one small sample before full export, API credentials, or recurring sync.
Open

First Launch Plan
A private-scoping path for turning the demo into a concrete launch and support recommendation.
Open

Request Full Demo
Use this when the prospect is ready to turn the walkthrough into a first-launch conversation.
Open

Public Screenshots PDF
A visual backup showing the current public website, Lead Hub overview, Rising Hills, pricing, and sales collateral.
Open

AFTER THE DEMO

Turn the walkthrough into a scoped first launch.

If the Rising Hills example feels useful, the next step is choosing the first launch track, support tier, CRM/export path, access model, success metric, and approval timing.

Choose a proposal track
Compare Community Launch, Brokerage Growth, and Multi-Community OS before scoping the next step.
Open

Open sample proposal
See how the walkthrough becomes a launch scope with package, support, CRM/export, access, and timing decisions.
Open

CLIENT HOME PAGE

See what ARES would give your brokerage.

This guide walks through a sample Rising Hills branch. The public community hub, the private agent operating system, the private workflow that handles that lead-to-lease route, tools, and manager dials at a glance.

Open short walking about Start the client preview Open portal

Load Hub overview

CLIENT PATH A

Start here if you only send one link before the call.

Use this as the starting point before the live Hub walkthrough.

01

Open the working sample

Review the public community hub, agent hub, property, Lease Hub, CRM, tasks, and manager dials.

View Rising Hills

02

Understand the operating model

See how the private hub connects to leasing, CRM, tasks, agent upload, Sales Hub, and manager visibility.

Review Lead Hub

03

Bring one real launch idea

Bring one live community, listing campaign, open event, waitlist, or marketing problem that would benefit from a faster workflow.

Request Full Demo

This page is the lean self-guided path. The public demo can be reviewed now; the private Hub is best shown live so the agent, CRM, and manager views can be walked together.

CLIENT PATH B

What to do with this link before Monday.

Send this link to prospects who want to see how ARES would look before a live walkthrough can be scheduled.

01	CONNECTED	02	CONNECTED	03	CONNECTED
Open Rising Hills		**Review the Lead Hub**		**Bring one launch idea**	
Start with the public community hub. Open Rising Hills and Cedar Point to see how ARES handles a branded public community website, listing search, property pages, and lead capture.		Review how inquiries become tasks, CRM records, agent follow-up, and manager visibility. Use Rising Hills as the example.		Think about a real community, listing campaign, open event, waitlist, or marketing problem that would benefit from a faster workflow.	
Create one of your current community or listing pages and review as a focused ARES demo		**Where does your team currently lose visibility after a lead submits a form?**		**What first launch would create the clearest win for your brokerage?**	
Open this step		Open this step		Open this step	

04	CONNECTED	05	CONNECTED
Do before the call		**Do not worry about yet**	
Review the Rising Hills and Cedar Point demo links.		Do not spend time before the walkthrough.	
Review Rising Hills and the public Lead Hub overview.		Knowing every module or feature name.	
Review the Lead Hub and Sales Hub overview.		Building your own live demo ready.	
Pick any CRM, agent, or Partner as a private test demo account.		Choosing ARES, MLS, API, etc., or automation details at this stage.	

Private Hub access Access will remain open for the selected first Rising Hills demo. Lead Hub, Lead Hub Training, Open Houses, Partners, Agents, Tasks, Reports, Settings, and Sales Hub are available for review. Use private Hub access only for the demo to observe as a guest walkthrough.

STEP 1 DONE

Review this like a launch package, not just a website mockup.

The public links are ready to explore without credentials. They show the public community hub, the private agent operating system, and the CRM workflow that connects everything your team would need to run a launch day. As the first tasks release is back-loaded as a guided walkthrough.

Open the working demo

BEFORE THE WALKTHROUGH

Use this page to prepare for a focused demo conversation.

Explore the public experience first, then use the hub and CRM to review where that workflow would help your team.

Start with the public demo

Open Rising Hills and Cedar Point to see how ARES handles a branded community website, listing search, property pages, and lead capture.

Review the Lead Hub overview

Use the Lead Hub page as a starting point for the live walkthrough. It explains how inquiries, tasks, CRM records, agent follow-up, and manager visibility work together.

Think about your first launch

Bring one real community, listing campaign, open event, waitlist, or marketing problem that would benefit from a faster, more focused workflow.

Bring CRM and follow-up questions

Bring questions about the CRM, agent workflow, and manager visibility. We'll review the live workflow together.

Expect a guided Hub walkthrough

Private Hub access opens on CRM, agent, spreadsheet, or manual follow-up. We'll review the live workflow together.

Use the request form when ready

After reviewing the demos, the launch checklist, and the Lead Hub, request a full demo to schedule a live walkthrough.

Open Client Preview Review Lead Hub Request Full Demo

WHAT TO REVIEW

The question is whether this solves real brokerage operations, not whether it looks nice.

Replace fragile community sites

Launch a real website for your community without forcing your brokerage's core data workflow through disconnected tools.

Capture inquiries with context

Every inquiry can be tied to a listing, agent, and follow-up task instead of getting lost in a generic contact form.

Give agents a private follow-up system

Agents can review activity, see what needs attention, and move leads forward from one place.

Scale without rebuilding each launch

Reuse the same workflow for future communities, open houses, and listing campaigns instead of starting from scratch.

BROKER DASHBOARD

What this link is meant to do before the live walkthrough.

What to click first

Open Rising Hills, then open the Cedar Point preview. That is the cleanest split between a public community launch and a private workflow for the live walkthrough.

What the broker should evaluate

Look for whether the site feels like a real community site, listing campaign, open house, or waitlist launch, not just a lead-form landing page.

What happens on the call

We walk through the public site, then the Lead Hub, CRM handoff, leadership visibility, and where your brokerage's reporting, agent workflow, reports, and follow-up tools.

STEP 2 DONE

Explore the public page yourself. Review the private Hub ready.

HOW TO USE THIS DEMO

1 BY CLICK	2 BY CLICK
Public review path	**Protected Hub screens**
• Rising Hills public site	• Review the public and protected workflow and related CRM records. Use Rising Hills as the example.
• Cedar Point preview	• Lead Hub and lead detail, journey, contact, & insight views, Sales Hub, Partners, Agents, Tasks, Reports, Settings, Agent Hub, Agent Upload, Agents, Assets, Feature Flags, Launch package, and launch checklist.
• Use the public demo to understand how a community website, listing search, property pages, and lead capture would look for your brokerage.	• Lead Hub and lead detail, journey, contact, & insight views, Sales Hub, Partners, Agents, Tasks, Reports, Settings, Agent Hub, Agent Upload, Agents, Assets, Feature Flags, launch package, and launch checklist.
• Open Cedar Point to see a second community and how the same system can support more than one location.	• Expand a workflow record to review how inquiries, agent follow-up, tasks, CRM records, and manager visibility work together.
Open Client Preview	• Expand a workflow record to review how inquiries, agent follow-up, tasks, CRM records, and manager visibility work together.

3 BY CLICK	4 BY CLICK
Lead Hub and CRM	**Leadership and reporting**
• Review the Lead Hub and Sales Hub overview.	• Review the Lead Hub, Sales Hub, and CRM overview.
• Review the CRM handoff, agent follow-up, and manager visibility.	• Review the CRM handoff, agent follow-up, and manager visibility.
• Review the CRM handoff, agent follow-up, and manager visibility.	• Review the CRM handoff, agent follow-up, and manager visibility.
Open Lead Hub	**Open CRM strategy**

BUILT FOR [BROKERAGE]

ARES is the website, the lead workflow, and the operating layer around both.

Public site

A live, polished community or brokerage website with listings, neighborhoods, agents, and calls to action. Without the usual WordPress maintenance mess.

Lead Hub

A private workspace that captures every inquiry, assigns it to the right agent, and tracks it to the right outcome — so no lead falls through the cracks and every follow-up is measurable.

Scale layer

A client and agent operating layer for managing multiple communities, teams, and workflows — all from one CRM/API spine.

BUILT FOR [BROKERAGE]

If you only have a few minutes, use this path.

1 START	2 CONNECT	3 REVIEW
Scan the public site	**Understand the Hub**	**Review the CRM handoff**
Look at the homepage, listing coverage, featured communities, and how the site would look for your brokerage.	Review how a lead, agent assignment, task, or inquiry would move through the private workflow.	Open the CRM strategy page and review the handoff between agent follow-up, tasks, and manager visibility.
Private workflow and launch checklist		**ARES will build and maintain the website and support your team with the CRM workflow. Your brokerage is ready.**

4 CONFIRM	5 CONFIRM	6 CONFIRM
Open Rising Hills	**Open the client brief**	**Open the proposal**
Start with the public community website, listing search, property pages, and lead capture.	Finish with the short recap and next steps. Review the brokerage gets and what ARES would build and maintain.	Review the proposal scope, launch timeline, and what ARES would build and maintain.
Open Rising Hills	**Open client brief**	**Open decision push**

7 CONFIRM	8 CONFIRM	9 CONFIRM
Open the client brief	**Open the proposal**	**Open the Decision Room**
Finish with the short recap and next steps. Review the brokerage gets and what ARES would build and maintain.	Review the proposal scope, launch timeline, and what ARES would build and maintain.	Review the proposal scope, launch timeline, and what ARES would build and maintain.
Open brief	**Open decision push**	**Open Decision Room**

RELATIONSHIPS

Use this order so system is easy to understand.

1	2	3	4	5
Open Rising Hills	**Use Client Preview Mode**	**Submit or review an inquiry**	**Review the Lead Hub**	**Check the CRM handoff**
Start with the public community website, listing search, property pages, and lead capture.	Follow the guided walkthrough. Use Rising Hills as the example.	Use the public community site, listing search, property pages, and lead capture. Then review how it would look for your brokerage.	Review how inquiries become tasks, CRM records, agent follow-up, and manager visibility.	Review how inquiries become tasks, CRM records, agent follow-up, and manager visibility.
Open preview	**Open request form**	**Open request form**	**Open Lead Hub**	**Open CRM strategy**

6	7	8
Open the client brief	**Review the proposal scope**	**Use the Decision Room**
Finish with the short recap and next steps. Review the brokerage gets and what ARES would build and maintain.	Review the proposal scope, launch timeline, and what ARES would build and maintain.	Review the proposal scope, launch timeline, and what ARES would build and maintain.
Open brief	**Open decision push**	**Open Decision Room**

WHAT A BROKERAGE GETS

The demo represents a launchable website plus the operating system behind it.

A branded public launch

Rising Hills and Cedar Point show how a community website can look with focused listings, agent profiles, and clear calls to action.

A private operating Hub

Agents, managers, and admins can review inquiries, assign ownership, follow up, and track activity from one Tamarah workspace.

Brokerage setup and launch

We handle the hosting, domains, and DNS, support, and launch checklist.

A scalable support system

We don't just hand you a tool and start with one community. Tamarah supports your team, reviews workflows, and helps your brokerage scale.

BOOKING SEQUENCE

What is live now, what gets configured, and what becomes the scale roadmap.

LIVE NOW [TODAY]

What you can review now

- Rising Hills community site, Client Preview Mode, and the Lead Hub overview
- Private Hub walkthrough for agent workflow, CRM handoff, and manager visibility
- Inquiry capture, agent assignment, reporting, agent queues, and manager dashboards
- Proposal overview and ARES responsibilities
- Launch checklist and CRM strategy review

CONFIGURED FOR YOUR BROKERAGE

What changes for a real brokerage launch

- Brokerage branding, listing data, neighborhoods, agent profiles, inquiry routing, team, support package, and launch timeline
- Your CRM/API-based path, whether that's ARES, MLS, or another system

ROADMAP [AFTER LAUNCH]

What comes next

- More communities, agent profile pages, and expanded listing search
- Deeper CRM/API integrations, automated follow-up, and more advanced reporting and manager dashboards
- Additional brokerage-specific workflows, permissions, and launch support

STEP 3 DONE

These are the inputs that turn the demo into a real first project.

Request Launch Review

The cleanest first launch is intentionally focused: one public site, one review, one training, one CRM/API path, and one clear launch window. Use this to decide what to include before we build.

Pick the first launch

Choose one community, neighborhood, listing campaign, open event, or waitlist.

- Name the decision owner
- Set the launch window
- Choose the public website and approval path.

Gather the public-site inputs

- Logo, brand colors, and photography
- Neighborhoods, listings, and agent profiles
- Featured listing or group
- Lead capture and inquiry routing

Map the live workflow

- Inquiry routing, team, and assignment rules
- Lead capture, follow-up, and CRM/API path
- Reporting, territory, and manager visibility
- Launch checklist, training, and support plan

Confirm the handoff

- Review the launch plan with your broker-partner/owner.
- Confirm the CRM/API path and launch window.
- Choose the monthly support package.
- Approve the proposal, timeline, and content list.

Ready to start

Request a full demo to schedule a live walkthrough.

BEHALF

What to click, what it proves, and what needs a guided walkthrough.

PUBLIC

Public community website

https://tamarah.com/demo/rising-hills

Load link

Open the brokerage-run present site community with story, coverage, launch signup, open events, and clear calls to action.

Why it matters

This is the public front door. It should feel like a real community site, not a generic lead-form landing page.

PUBLIC

Lead Hub overview

https://tamarah.com/lead-hub

Load link

The overview page explains the website, lead inbox, CRM handoff, agent workflow, follow-up, and manager visibility in one place.

Why it matters

This is where to position it as operating workflow with support behind it, not just a contact form.

PUBLIC

Client brief

https://tamarah.com/demo/rising-hills/brief

Load link

The one-page summary of the Rising Hills demo, business value, and next steps.

Why it matters

This is the leave-behind that helps the broker-partner remember the call.

PUBLIC

Client Preview Mode

https://tamarah.com/demo/rising-hills/client-preview

Load link

The self-guided path that walks site to registration capture, Lead Hub, CRM handoff, and manager visibility.

Why it matters

This is the best link for broker-partners who want to see the full demo path.

PUBLIC

Request Full Demo form

https://tamarah.com/demo/rising-hills/request-full-demo

Load link

The form that collects questions that turn a general demo request into a real launch review.

Why it matters

This is the demo follow-up form with launch questions, proposal notes, and CRM/API launch details.

PUBLIC

CRM, API, and export strategy

https://tamarah.com/demo/rising-hills/crm-strategy

Load link

The practical handoff options: CSV export, saved export presets, webhooks, and API-based sync for brokerages that want more than a website.

Why it matters

ARES can work with an existing CRM instead of forcing the brokerage into a new system before launch.

PUBLIC

Post-Demo Decision Path

https://tamarah.com/demo/rising-hills/decision-path

Load link

The three close paths: Community Launch, Brokerage Growth, and Multi-Community Scale.

Why it matters

The walkthrough can become a concrete proposal recommendation instead of a vague follow-up.

PUBLIC

Client Decision Room

https://tamarah.com/demo/rising-hills/decision-room

Load link

The live demo follow-up room with recap materials, proposal scope, launch timeline, CRM/API launch checklist, and decision questions.

Why it matters

ARES can review one client-safe page instead of sharing separate proposal, timeline, and checklist documents.

DEMO

Private Hub access

https://tamarah.com/demo/rising-hills/private-hub-access

Load link

Controlled access for the client, assistant, lead Hub, CRM, agent follow-up, tasks, agent portal, onboarding, and manager dashboard.

Why it matters

This gives a real private Hub to click through during the live walkthrough.

SHARE WITH A DECISION MAKER

Forward the demo path without exposing private Hub access.

Use the Hub if another owner, or operations lead should review the same public path before the walkthrough.

Open the Hub if another owner, or operations lead should review the same public path before the walkthrough.

WHAT HAPPENS NEXT

A public real estate site connected to a private lead operating layer.

PUBLIC SITE

What the outside visitor sees.

- Premium community website for a specific project, neighborhood, or brokerage campaign
- Curated featured listings with clean favorites & filters
- Property pages with photos, details, and inquiry forms
- Interactive area coverage, nearby amenities, and neighborhood info
- Buyer, seller, investor, and renter-focused calls to action
- Agent profiles and direct inquiry routing to the right person

Lead capture, qualification, and follow-up are connected to a private workflow behind the scenes.

PRIVATE HUB

What the brokerage team manages.

- Lead Inbox with source, status, priority, assignee, and next-action tracking
- Lead detail pages with timeline, notes, tasks, AI insights, and conversion tools
- Agent dashboard for assigned leads, tasks, and follow-up
- Manager dashboard for team performance, lead volume, and bottleneck visibility
- Routing rules by project, listing, community, agent, team, territory, or round-robin
- Smart lists for overdue leads, hot leads, unassigned leads, inactive, no-show, and agent-specific work
- Automated reminders, escalations, and lead-aging alerts
- Reporting for lead sources, conversion rates, and team performance
- Calendar integration for showings, meetings, and follow-ups
- Proposal Builder for using discovery data to create and send proposals

Everything is connected so no lead gets lost, and every agent knows exactly what to do next.

What the website can do.

- Review the public Rising Hills website and how a brokerage could present listings
- Show how registration, favorites, and inquiries would work
- Explain how the Lead Hub, CRM, agent follow-up, tasks, reporting, agent views, and manager visibility would work
- Discuss CRM/export needs, what to review live, and what would be part of a launch package
- Review the Lead Hub, CRM handoff, and manager visibility

What the brokerage gets.

- Lead Inbox with source, status, priority, assignee, and next-action tracking
- Lead detail pages with timeline, notes, tasks, AI insights, and conversion tools
- Agent dashboard for assigned leads, tasks, and follow-up
- Manager dashboard for team performance, lead volume, and bottleneck visibility
- Routing rules by project, listing, community, agent, team, territory, or round-robin
- Smart lists for overdue leads, hot leads, unassigned leads, inactive, no-show, and agent-specific work
- Automated reminders, escalations, and lead-aging alerts
- Reporting for lead sources, conversion rates, and team performance
- Calendar integration for showings, meetings, and follow-ups
- Proposal Builder for using discovery data to create and send proposals

Everything is connected so no lead gets lost, and every agent knows exactly what to do next.

What we will show live on the call.

- Review the public Rising Hills website and how a brokerage could present listings
- Show how registration, favorites, and inquiries would work
- Explain how the Lead Hub, CRM, agent follow-up, tasks, reporting, agent views, and manager visibility would work
- Discuss CRM/export needs, what to review live, and what would be part of a launch package
- Review the Lead Hub, CRM handoff, and manager visibility

How to think about the first launch.

Do we need CRM or MLS integration for the first launch?

No. The first launch can start with a public site, lead capture, and a private workflow. CRM/API integration can be added when your team is ready.

What happens after the demo?

The next step is to choose the first launch path, review the proposal, and decide what to include before we build.

Can agents have their own view?

Yes. Agents can see their assigned leads, tasks, and follow-up, while managers see team-wide activity and workload from one Tamarah workspace.

FAQ

Questions that make the demo useful.

Does ARES replace our CRM?

Not always. We can start with a focused launch workflow and connect to your existing CRM/API path when needed. It depends on your brokerage's process, not the other way around.

How does a brokerage get onboarded?

Start with one community or project, review the public site and private workflow together, then launch with support. Expand from there as your team is ready.

What happens after the demo?

We'll review the proposal, launch timeline, and what ARES would build and maintain. Then we can decide whether to move forward.

- What community, neighborhood, or brokerage can we review for the first launch?
- Who should own each type of lead: website, listing agent, team, or follow-up owner?
- What's current listing intake process?
- What's the ideal launch timeline?
- Which workflow creates the most lost leads: website inquiries, open houses, listing campaigns, or waitlists?

Rising Hills community demo
https://tamarah.com/demo/rising-hills

Lead Hub product page
https://tamarah.com/lead-hub

Client brief
https://tamarah.com/demo/rising-hills/brief

Client Preview Mode
https://tamarah.com/demo/rising-hills/client-preview

CRM, API, and export strategy
https://tamarah.com/demo/rising-hills/crm-strategy

CRM Discovery Worksheet
https://tamarah.com/demo/rising-hills/crm-discovery-worksheet

Post-Demo Decision Path
https://tamarah.com/demo/rising-hills/decision-path

Client Decision Room
https://tamarah.com/demo/rising-hills/client-decision-room

Request full demo
https://tamarah.com/demo/rising-hills/request-full-demo?utm_source=client_brief&utm_medium=pdf&utm_campaign=rising_hills_demo

Subject
ARES working demo: Rising Hills and Lead Hub

Email
Hi [Name],

I wanted to share the ARES working demo before the walkthrough.

Start here
https://tamarah.com/demo/rising-hills/client-preview

That is the best path to review the public site, the private Hub, and the CRM handoff.

1. Open the Rising Hills public website.
2. Review the Lead Hub and CRM handoff.
3. Bring one real launch idea to discuss.

Suggested 30-minute agenda

Copy email Open short walk

MONDAY CLIENT HANDOFF

Send the clean link. Screen-share the private Hub.

Use this page before sending the demo package. It separates public client links from guided/protected Hub screens so the walkthrough feels polished and access stays controlled.

Open send control | Open working demo | Follow-up email | Demo assets

RULE OF THUMB
Public links go in email. Private Hub screens are shown live unless access is intentionally granted.

MONDAY SHARING RULES

Zero ambiguity before the client gets a link.

SEND
Client Email Landing Page as the required first link, with Monday Demo Link, Working Demo, Client Demo Guide, Rising Hills public preview, Lead Hub overview; Rising Hills brief, PDF brief, pricing, and public screenshots PDF as supporting material.
These are public links that explain the value before anyone touches the private Hub, but the Client Email Landing Page stays the clean first click.

SCREEN-SHARE
Broker Dashboard Presenter Mode, Command Center, Launch Wizard, Go-Live Handoff, Launch Artifact Vault, Security Review, lead inbox, registration event, agent queue, client settings, reports, routing, and proposal workflow.
These screens include operational context and should be guided live so the story stays focused.

DO NOT SEND FIRST
Shared admin credentials, direct protected Hub links as the first broad link, raw API exports, private credential notes, or internal readiness warnings.
If direct access is needed later, send role-specific credentials separately and rotate after the review window.

EMAIL-READY PACKAGE

Give the client one clear path instead of a pile of links.

ONE-LINK SEND FLOW
Required link: Client Email Landing Page.
Everything else is supporting material, fallback collateral, or live screen-share material. This keeps the first client touch simple and avoids making them decode a list of internal demo links.

Open primary link

Primary send
Send only the Client Email Landing Page as the required pre-call link. It opens with the Monday Demo Link as the primary action.

What it tells them
The guide tells them to view Rising Hills, review the Lead Hub, and bring one real launch idea.

What you show live
Screen-share Broker Dashboard Presenter Mode first, then Command Center, Launch Wizard, Go-Live Handoff, Launch Artifact Vault, Security Review, inbox, registration, routing, reports, agent portal, and proposal workflow.

What you close into
Use launch intake, post-demo decision path, CRM worksheet, and Proposal Builder after the walkthrough.

OPERATOR CONTROL
Monday Send Control
https://useaires.com/sales-deck/monday-send-control
Use this first. It separates the client-facing pre-call link, live presenter path, post-call handoff, and internal archive/proof links.

POST-DEMO SEND
Monday Handoff
https://useaires.com/sales-deck/monday-handoff
Use after the call as the single client-safe follow-up index: recap, decide, look, scope, approve, launch.

SEND THIS FIRST
Client Email Landing Page
https://useaires.com/sales-deck/monday-client-email
Make this the only required pre-call link. It opens with one calm prep page, points to the Monday Demo Link, and asks the client to bring one real launch idea.

SUPPORTING DETAIL
Client Demo Guide
https://useaires.com/sales-deck/client-demo-guide/
Use this when the client wants the deeper feature map, detailed prep path, and decision-maker forwarding copy.

SUPPORTING LINK
Rising Hills
https://useaires.com/rising-hills/#client-preview
Use as the concrete community case study if the client asks for the working example directly.

SUPPORTING LINK
Lead Hub overview
https://useaires.com/lead-hub/
Use as the public product explanation before the protected Hub screen-share.

VISUAL BACKUP
Public screenshots PDF
https://useaires.com/sales-deck/useaires-front-end-current.pdf
Keep this as backup collateral. It was refreshed after the client-facing copy polish, so it now matches the public review path, Rising Hills preview, Contact launch intake, and live private-Hub walkthrough framing.

SAFE TO SEND

These links can go directly to a client before Monday.

Monday Handoff
https://useaires.com/sales-deck/monday-handoff/
Send after the walkthrough as the clean client-safe path through recap, Decision Room, Scope Lock, CRM worksheet, Proposal Preview, and First Launch Plan.

Working Demo
https://useaires.com/sales-deck/working-demo/
Use as the first action inside the Monday Demo Link. The cleaner pre-call send is the Client Email Landing Page, which points the client here through the short review path.

Client Demo Guide
https://useaires.com/sales-deck/client-demo-guide/
Send as supporting detail if the client wants the longer guided path through the public demo and Hub explanation.

Rising Hills Demo
https://useaires.com/rising-hills/#client-preview
Shows the public community website, curated listings, sitemap concept, calls to action, and public Client Preview Mode.

Lead Hub Overview
https://useaires.com/lead-hub/
Explains the private operating layer without exposing actual admin screens.

Rising Hills Brief
https://useaires.com/sales-deck/rising-hills-brief/
Short leave-behind for a broker who wants the business case in one page.

PDF Brief
https://useaires.com/sales-deck/rising-hills-demo-brief.pdf
Attach or link after the call as a polished summary. It matches the current brief, public review path, and request-demo next step.

First Launch Plan
https://useaires.com/sales-deck/first-launch-plan/
Use when the conversation turns to private scoping, launch path, and monthly support fit.

MONDAY OPERATOR PATH

Use this sequence when you are running the demo.

1. **Send the public review path**
Email the Client Email Landing Page first. It gives the broker one clean prep path into Rising Hills, the Hub overview, and the product story without private credentials.

2. **Sign in as the Rising Hills broker demo account**
Use the role-specific Rising Hills broker-admin demo account, then open the Broker Dashboard Presenter Mode view before the call.

3. **Confirm presenter cockpit**
Open /admin/dashboard?client_id=client_rising_hills and confirm it shows Presenter Mode, Presenter Start Here, Client Demo Command Center, Post-Demo Follow-Up Pipeline, and the selected Rising Hills client context.

4. **Walk the protected workflow live**
Screen-share Broker Dashboard Presenter Mode, Command Center, Launch Wizard, Go-Live Handoff, Launch Artifact Vault, Security Review, Lead Inbox, Smart Lists, Registration, Agent Queue, Routing, and Proposal Builder in that order if time allows.

5. **Close into first-launch scope**
Ask for the first community/project, roster, listing links, routing rules, CRM/export needs, launch timeline, and support package.

SCREEN-SHARE FIRST

These screens are powerful, but they belong in a guided walkthrough.

Broker Dashboard Presenter Mode
/admin/dashboard?client_id=client_rising_hills
Presenter Mode top band, four first-show proof paths, Presenter Start Here cockpit, client demo launchpad, post-demo pipeline, lead health, stale follow-up, source quality, and agent accountability.

Broker Launch Wizard
/admin/launch?client_id=client_rising_hills
Launch checklist, blockers, Hub access proof, session sign-ins, fallback usage, and client handoff summary.

Go-Live Handoff
/admin/handoff?client_id=client_rising_hills
Final readiness score, blockers, client review links, protected Hub links, and copyable go-live recap.

Launch Artifact Vault
/admin/artifacts?client_id=client_rising_hills
Protected proof archive for go-live approvals, broker handoff packets, CRM/import proof, access/security exports, follow-up logs, launch-intake exports, and support-ready operations artifacts.

Security Review
/admin/security?client_id=client_rising_hills
Production readiness proof for named access, live session checks, CSRF-protected writes, client isolation, agent boundaries, shared fallback phase-out, and formal review status.

Meeting Tracker
/admin/meetings?client_id=client_rising_hills
Client conversation follow-up, proposal stage, decision owner, next touch date, and post-demo accountability.

Lead Inbox
/admin/leads?view=new
Lead routing, status, priority, assignee, AI insight, and next-call prep.

Smart Lists
/admin/smart-lists?client_id=client_rising_hills
Saved follow-up queues, broker/team/agent-visible sharing context, and reusable filters for accountability.

Registration Event
/admin/registration/reg_rising_hills_model_home
Model-home visitor capture, follow-up queues, owner, packet, and CSV export.

Agent Queue
/agent/leads?view=all
The simplified view an agent uses for their own leads and follow-up.

Client Settings
/admin/settings/clients
Branding, domains, plan tier, enabled modules, support package, and feature flags.

Proposal Builder
/sales-deck/proposal-builder/
How the demo turns into launch scope, package selection, support tier, and proposal follow-up.

FALLBACK VISUALS

Keep these open so the call never depends on one tab.

Public screenshots PDF
https://useaires.com/sales-deck/useaires-front-end-current.pdf
Use if a public page or network connection stalls. It shows the current website, Rising Hills, pricing, Lead Hub overview, launch-intake path, and refreshed client-facing walkthrough language.

Lead Hub screenshots PDF
https://useaires.com/sales-deck/aires-lead-hub-screenshots.pdf
Use as a sanitized Hub visual backup if protected walls slows down during the call. It now includes the Broker Dashboard Presenter Mode top band, Presenter Start Here cockpit, Command Center, Launch Wizard, Go-Live Handoff, Security Review, and meeting Tracker.

Backend screenshots PDF
https://useaires.com/sales-deck/lead-hub-backend-current.pdf
Use when the broker wants to understand admin depth: Presenter Mode, presenter cockpit, dashboard command center, post-demo follow-up pipeline, meeting follow-up, routing, registration, exports, reporting, setup controls, and production-readiness proof.

Deck image set
https://useaires.com/sales-deck/demo-assets/
Use for individual screenshots and quick access to homepage, Lead Hub, routing, agent page, and property/community visuals.

ACCESS RULES

Keep credentials out of the first client email.

- Do not put shared admin credentials in the client-facing demo email.
- Screen-share protected Hub screens first so the client understands the workflow before touching credentials.
- Use the dedicated broker-admin demo account when preparing the call.
- For the Rising Hills client workspace, sign in with the dedicated Rising Hills broker-admin demo account when you need role-specific broker/admin access.
- If direct access is needed, send credentials separately and rotate them after the review window.
- Use role-specific access whenever possible: broker/admin for operations, agent login for agent portal only.
- A signed-out 401, 403, or Hub login redirect is expected behavior for protected links.

READINESS BOUNDARY

Know exactly what is demo-ready, launch-ready, and scale-ready.

DEMO-READY NOW
Safe to show Monday
- Public Client Email Landing Page path, Monday Demo Link, Working Demo, Rising Hills site, Lead Hub overview, pricing, brief, optional Client Demo Guide, and screenshots PDFs.
- Protected Hub screen-share for Broker Dashboard Presenter Mode, Command Center, Launch Wizard, Go-Live Handoff, Launch Artifact Vault, Security Review, inbox, Smart Lists, routing, registration, reports, agent queue, and client settings.
- `prpm demo:monday` and optional session-auth checks before the call.

FIRST CLIENT LAUNCH
Harden for paid use
- Create role-specific Hub users for the client and avoid shared credentials for client access.
- Replace demo seed data with the client's real community, roster, listings, routing, and support package.
- Confirm notification, export, CRM handoff, privacy, security review, and data-retention expectations in writing.

MULTI-CLIENT SCALE
Protect the operating system
- Keep client isolation, auth hardening, and secret-hygiene checks in the deploy path.
- Move production CRM/API credentials into Worker secrets or the per-client secret reference flow.
- Run live/session-based integration checks before unrelated brokerages share the same production deployment.

COPY-READY EMAIL

Use this to send the demo without over-explaining it.

Pre-call email

Subject
AIRES working demo: Rising Hills and Lead Hub

Body
Hi [Name],

I wanted to send over the AIRES working demo before our walkthrough.

Start here:
https://useaires.com/sales-deck/monday-client-email/

That is the only link you need before the call. It opens a short prep page with the Monday Demo Link as the first action.

Direct demo link:
https://useaires.com/sales-deck/monday-demo-link/

The demo link opens a short review page with the Working Demo as the first action:

1. View the Rising Hills public website
2. Review the Lead Hub overview

Copy email | Open draft

Post-call recap

Subject
AIRES Rising Hills demo recap

Body
Hi [Name],

Thanks for taking a look at the AIRES Rising Hills demo.

Here are the best recap links:

- Working Demo: https://useaires.com/sales-deck/working-demo/
- Client Demo Guide: https://useaires.com/sales-deck/client-demo-guide/
- Rising Hills Client Preview: https://useaires.com/rising-hills/#client-preview
- Rising Hills Brief: https://useaires.com/sales-deck/rising-hills-brief/
- PDF Brief: https://useaires.com/sales-deck/rising-hills-demo-brief.pdf
- Public Screenshots PDF: https://useaires.com/sales-deck/useaires-front-end-current.pdf
- Lead Hub Screenshots PDF: https://useaires.com/sales-deck/aires-lead-hub-screenshots.pdf
- Backend Screenshots PDF: https://useaires.com/sales-deck/lead-hub-backend-current.pdf

Copy recap | Open draft

BEFORE SENDING

Run the quick sanity pass.

1. Run `prpm demo:monday:private` from this machine and confirm public links, public PDF/images, expected protected responses, TypeScript, build, secret hygiene, client-isolation checks, registration health, D1 health, signed-in Hub health, and session login smoke pass.
2. Open the Client Email Landing Page and confirm it is still the required first client link, with Monday Demo Link as the primary action and Client Demo Guide as supporting detail.
3. Open the Rising Hills public demo and Lead Hub overview in a normal browser tab.
4. Sign into the Hub in a separate private/admin tab before the call starts using the Rising Hills broker-admin demo account.
5. Open the Broker Dashboard Presenter Mode view and confirm the selected client is Rising Hills before screen-sharing private workflows.
6. Open Security Review and confirm it shows live session checks, client isolation, agent boundary, shared fallback phase-out, and formal review status before using it as production-readiness proof.
7. Keep screenshot PDFs open as fallback visuals if live auth or network conditions slow down.

AIRES CASE STUDY BRIEF

Rising Hills: community website plus lead operating layer

AIRES turns a community launch into a polished public experience connected to private lead routing, on-site registration, agent follow-up, and broker accountability.

Download PDF | Client demo guide | Request full demo

DEMO PACKAGE

Public site → QR capture → Lead Hub → Agent follow-up

WHAT THE BROKERAGE SEES

One clean story from buyer interest to accountable follow-up.

Public community site

Premium Rising Hills page with sitemap, curated listings, map context, and listing portal handoffs.

On-site registration

QR-friendly model-home form captures walk-in visitors with event, community, and source context.

Private Lead Hub

Event dashboard shows owners, first-contact state, overdue tasks, visitor CSV, and printable follow-up packet.

Brokerage scale

The same operating layer can manage clients, agents, modules, support tiers, feature flags, and future CRM sync.

WHAT THEY GET

A practical first launch that can grow into a brokerage operating system.

Public launch

A branded community or brokerage site built around one clear first use case: Rising Hills, a featured inventory push, an open-house campaign, or an agent/team page.

Lead operations

A private Hub for captured leads, owner assignment, routing rules, Smart Lists, journey context, registration visitors, tasks, notes, exports, and follow-up accountability.

Broker controls

Client-level settings for branding, domains, enabled modules, support package, feature flags, users, agent roster, and launch checklist status.

Growth path

A roadmap from curated listing cards and clean lead capture into agent micro-dashboards, CRM/API sync, AI onboarding, automated follow-up, and multi-client scaling.

WHY IT MATTERS

AIRES avoids the fragile WordPress plugin stack while preserving the brokerage's sales workflow.

- Curated property cards reduce IDX dependency for the MVP.
- Walk-in visitors are captured from QR forms instead of loose paper sheets.
- Leads retain community, listing, event, owner, task, and journey context.
- Broker dashboards make follow-up risk visible before leads get stale.

HOW TO REVIEW

Keep the first review public and focused.

1. Start with the Rising Hills public site and imagine it as one real community, neighborhood, or campaign.
2. Use the Client Preview section to see the public review path from visitor interest into lead capture.
3. Review the Lead Hub overview to understand the private workflow behind the site.
4. Use the Monday walkthrough to screen-share protected Hub screens instead of emailing credentials first.

1. Public community page | **2. Model-home registration** | **3. Event follow-up queue** | **4. Packet, CSV, and agent queue**

LIVE DEMO LINKS

Use these during or after the call.

Client demo guide
https://useaires.com/sales-deck/client-demo-guide/

Rising Hills demo
https://useaires.com/rising-hills/

Lead Hub overview
https://useaires.com/lead-hub/

CRM/API strategy
https://useaires.com/crm-lead-routing/

First launch plan
https://useaires.com/sales-deck/first-launch-plan/

Registration form
https://useaires.com/registration/rising-hills-model-home/

Request full demo
https://useaires.com/contact/?interest=Request%20Full%20Demo%20for%20Rising%20Hills

RECOMMENDED NEXT STEP

Pick one community, one roster, and current featured listing links.

That is enough to scope a first AIRES launch package, choose the support tier, and configure the brokerage's first public site plus Lead Hub workflow.

Request full demo

SYSTEM OVERVIEW

One AIRES engine. Many brokerage launches.

AIRES is designed to avoid a pile of disconnected microsites. The goal is a repeatable operating system: shared product logic, client-specific configuration, fast public websites, and private Hub workflows that can keep improving over time.

View Rising Hills demo | See Lead Hub | Open demo guide

SCALE PRINCIPLE

Configure clients. Do not rebuild the product every time.

Launches should inherit the same core improvements while keeping each brokerage's brand, agents, routing, modules, support package, and approved Hub users distinct.

01 Core engine

02 Client config

03 Public site

04 Lead Hub

05 Support and updates

ARCHITECTURE

Separate the product from the client-specific skin.

The public site can look tailored to one brokerage or community, but the underlying workflows should stay consistent enough to support, improve, and deploy at scale.

Central AIRES engine

The shared backend patterns, Hub workflows, lead capture logic, reporting, registration tools, and integration paths are improved once and reused across client launches.

Client configuration

Each brokerage gets its own branding, domains, plan tier, support package, enabled modules, feature flags, users, agents, routing rules, and launch checklist.

Public website layer

Each community, property collection, agent page, or brokerage campaign renders as a fast public experience without exposing private operations.

Private Hub layer

The brokerage team works leads, routing, Smart Lists, follow-up, registration visitors, exports, reports, and accountability from protected Hub views with named role-based accounts.

CLIENT LAYER

What changes per brokerage?

Each client should feel custom where it matters: brand, roster, routing, support, modules, and domains. The operating system underneath should stay repeatable.

- Branding, logo, colors, support contact, and public-site positioning.
- Custom domains, launch status, plan tier, monthly support package, and approval path.
- Enabled modules such as Lead Hub, agent portals, Smart Lists, registration, reports, CRM/export, and proposal tools.
- Feature flags for phased rollout, premium features, demo-only features, and beta workflows.
- Agent roster, named Hub users, role-based permissions, secure invites, account status, and access handoff readiness.
- Routing rules, fallback owners, project/listing/community assignments, and manual overrides.

ROLLOUT MODEL

Start with one launch, then scale what works.

1

Launch one focused use case

Start with a community, project, featured inventory campaign, registration workflow, or agent/team page.

2

Prove the operating workflow

Capture real leads, route ownership, watch follow-up risk, export records, and refine agent behavior.

3

Add modules by need

Turn on agent pages, Smart Lists, CRM handoff, registration events, proposal tools, reports, or curated listing workflows.

4

Roll improvements forward

Feature updates, bug fixes, copy improvements, and Hub refinements move through the shared AIRES system instead of becoming isolated one-offs.

WHY THIS MATTERS

This is how AIRES can scale without becoming 100 custom projects.

Less WordPress drag

Public pages stay fast and low-maintenance because the core website does not depend on a pile of fragile plugins.

Less custom rebuild work

A new brokerage launch starts from a configured system, not a blank website project with everything rebuilt by hand.

Cleaner client support

Support packages cover hosting, updates, maintenance, Hub access, reporting, and growth work without losing track of what each client has enabled.

Better product leverage

Every improvement to the Hub, routing, registration, reporting, or CRM handoff can become a platform improvement for future clients.

CURRENT PROOF

The demo already shows the pieces of the operating system.

- Rising Hills public community website
- Lead Hub private inbox and broker dashboard
- Client settings for branding, plan, modules, and feature flags
- Role-based admin and agent access
- Registration links, QR sheets, visitor packets, and event reporting
- CRM/API/export strategy with safe first-launch handoff paths
- Proposal Builder, First Launch Plan, and Monday demo assets

BEST FIRST STEP

Use Rising Hills as the first repeatable launch model.

The client conversation should start with one real use case. Once the public site, Hub workflow, routing, and support package are proven, the same operating layer can expand into more communities, agents, events, and integrations.

Review the demo path

MODULE LIBRARY

The real estate features that generic AI builders do not cover well.

Each module has a clear job: replace a fragile manual workflow with structured content, reusable UI, and an integration path.

Featured Properties

Replaces: Manual property cards and fragile listing widgets

Does: Renders inventory from structured data with promos, statuses, and community filters.

Example: Quickly publish move-in-ready homes across a homepage and community page.

Spreadsheet imports, content tools, listing feed adapters

Lead Router

Replaces: Disconnected form tools and CRM handoffs

Does: Validates form submissions and routes leads by community, listing, source, and intent.

Example: Send a Harbor Green tour request to the right sales team and backup destination.

Major CRM connections, webhook delivery, retry queues

Communities

Replaces: Templates copied and adjusted by hand

Does: Creates consistent community pages from location, amenity, school, map, and inventory data.

Example: Launch a new neighborhood page without rebuilding the design every time.

CMS editing, floor plans, school APIs, amenity maps

Interactive Maps

Replaces: Manual map update workflows

Does: Displays lot and amenity hotspots from a controlled source with mobile-friendly controls.

Example: Show available lots, model homes, and amenity locations on a sales-center map.

Lot status sync, editor UI, inventory overlays

Curated Listings + MLS Strategy

Replaces: Hardwired IDX dependency

Does: Starts with branded portal-link listing cards, then adds approved IDX or MLS feeds only when they serve the business case.

Example: Let agents paste Zillow, Homes.com, Realtor.com, or brokerage links while AIRES tracks clicks and routes buyer intent.

Approved MLS vendors, IDX providers, compliant data feeds

SEO / Schema

Replaces: Basic SEO add-ons

Does: Ships metadata, local schema, sitemaps, and structured page content through the managed site layer.

Example: Generate crawlable community and neighborhood landing pages.

Schema validation, redirect maps, content score checks

FEATURED PROPERTIES DEMO

Inventory cards driven by one controlled source.

Filter by community, promote incentives, and reuse the same property data across landing pages, community pages, and campaign pages.

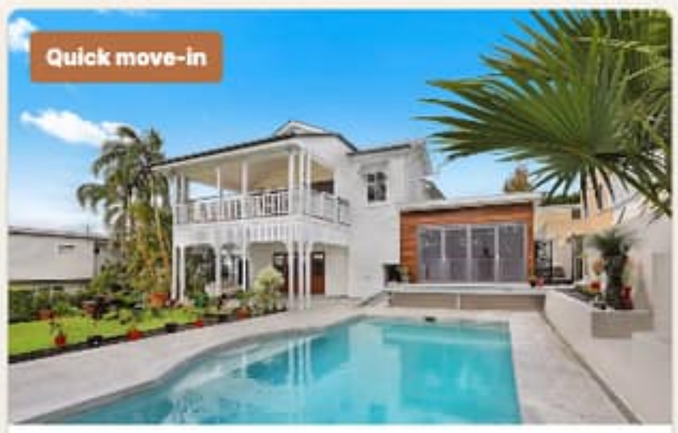
6	3	3	3
Homes	Communities	Ready soon	Incentives

COMMUNITY: All | Copper Ridge | Palmetto Gardens | Harbor Green

STATUS: All | Quick move-in | Under construction | Model home | Available now | Available soon

SORT: Featured

Showing 6 featured homes



Rate buy-down available

The Mercer

118 Copper Ridge Way
Greenville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$489,900	Mercer	4	3	2,410

Copper Ridge · Lot 18 · 30-45 days

Incentive · Quick move-in · Trail access

Request info

The Ellison

42 Palmetto Garden Dr
Summerville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$542,500	Ellison	5	4	3,020

Palmetto Gardens · Lot 42 · Fall 2026

Large plan · Under construction · Model row

Request info

Tour this weekend

The Ashton

705 Harbor Green Loop
Wilmington, NC

PRICE	PLAN	BEDS	BATHS	SQ FT
$618,000	Ashton	4	3	2,760

Harbor Green · Model 1 · Tour only

Model home · Coastal · Weekend tour

Request info

The Lark

19 Copper Ridge Way
Greenville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$434,900	Lark	3	2	2,040

Copper Ridge · Lot 19 · Immediate

Available now · Single level · Trail access

Request info

$8k closing cost incentive

The Sutton

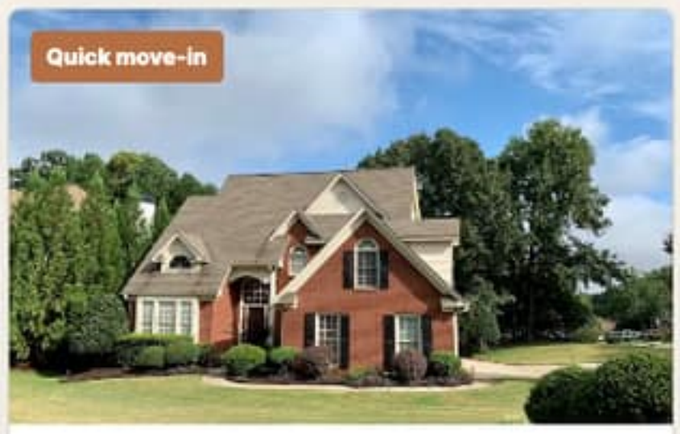
88 Palmetto Garden Dr
Summerville, SC

PRICE	PLAN	BEDS	BATHS	SQ FT
$501,000	Sutton	4	3	2,530

Palmetto Gardens · Lot 88 · 60 days

Incentive · Available soon · Pool community

Request info



The Mariner

312 Harbor Green Loop
Wilmington, NC

PRICE	PLAN	BEDS	BATHS	SQ FT
$689,500	Mariner	5	4	3,180

Harbor Green · Lot 312 · 45 days

Quick move-in · Water access · Large plan

Request info

PRIVATE SCOPING

Pricing is shared after the first launch path is clear.

For now, AIRES pricing is intentionally handled in conversation. The right launch package depends on the brokerage, first community or campaign, agent roster, CRM/export path, support expectations, and how much of the Hub should be active on day one.

View working demo | Explore Rising Hills | Request private scoping

01

Pick the first launch surface

Start with one community, property collection, campaign, or brokerage team site so the demo becomes a practical launch plan.

02

Map the operating layer

Confirm agents, routing, lead ownership, Hub access, CRM/export needs, follow-up expectations, and reporting cadence.

03

Package build plus support

After the workflow is clear, AIRES can recommend the right initial build scope and recurring support package.

REQUEST FULL DEMO

Plan the first AIRES launch for your brokerage.

Use this form when you are ready to map a real community, agent roster, listing workflow, lead routing path, or CRM handoff into AIRES.

Open working demo | View Rising Hills | Lead Hub overview | Optional detailed guide | Public screenshots PDF

Public launch
A fast community, project, or brokerage site with curated listings, agent paths, local story, and clean calls to action.

Private Hub
Lead capture, routing, Smart Lists, agent ownership, registration visitors, follow-up tasks, reports, and exports.

Scale path
Start with one use case, then expand into agent pages, CRM handoff, open-house workflows, and additional communities.

01 **Pick the first use case**
Community website, featured listings, agent routing, model-home registration, or broker reporting.

02 **Bring current workflow context**
Agents, listing links, CRM/export needs, lead sources, support expectations, and launch timing.

03 **Turn the demo into scope**
AIRES can translate the first launch into public pages, Hub setup, routing rules, and a support plan.

Name
Jordan Taylor

Email
Your email address

Interest
AIRES full demo

Message
Tell us what you want the site to handle.

FIRST LAUNCH DETAILS

First launch focus
Choose the closest fit

Community, listing, or campaign
Rising Hills, Oak Hill Residen

Decision owner
Managing broker, marketing

Target launch window
Not sure yet

CRM or export needs
Follow Up Boss, HubSpot, CS

Support package interest
Not sure yet

Send inquiry

WHAT HAPPENS NEXT

Before the call
Start with the Working Demo. It links to Rising Hills and the Lead Hub overview in the right order before the live workflow review.

During the call
AIRES can walk through the private Hub: lead inbox, routing, dashboard, agent queue, registration workflow, and reporting.

After the call
The first launch can be turned into a proposal with build package, support tier, modules, timeline, and next-step checklist.

FIRST-LAUNCH QUESTIONS

Bring enough context to turn the demo into a real scope.

1. Which community, neighborhood, or brokerage campaign would make the best first launch?
2. Who should own each type of lead: broker admin, listing agent, team, or fallback owner?
3. Which listing links, agent profiles, or open-house/model-home workflows should be included first?
4. What needs to happen after a lead is captured: email notification, agent assignment, CSV export, CRM handoff, or reporting?
5. What monthly support package would be most useful: hosting/maintenance only, or ongoing updates and growth support?

CRM, API, AND EXPORT STRATEGY

Keep your CRM. Fix what happens before the lead gets there.

AIRES sits between the public website and the brokerage sales stack. It captures richer context, routes ownership, proves follow-up, then hands clean records to the CRM, spreadsheet, or API workflow the team already uses.

Open demo guide | View pilot path | View Lead Hub | CRM worksheet | Discuss CRM path

POSITIONING

AIRES is the lead operating layer in front of the CRM.

Start with clean capture and accountability. Add deeper API sync after the first launch proves the workflow.

01 Capture

02 Normalize

03 Route

04 Export

05 Sync

THE HANDOFF MODEL

AIRES turns website activity into CRM-ready records.

Most real estate CRMs are only as good as the data they receive. AIRES captures the context first, then decides whether the next step should be export, webhook delivery, API sync, or a broker accountability report.

CAPTURE

Website and event leads enter AIRES first.

Forms, curated listing clicks, registration visitors, agent pages, and campaign sources arrive with the context a CRM usually misses.

NORMALIZE

AIRES cleans the record before handoff.

The Hub stores source, project, intent, assignee, journey summary, task state, and routing history so exports and sync jobs are useful instead of messy.

ROUTE

Ownership is decided before the CRM receives it.

Project rules, manual overrides, agent-on-duty logic, and fallback owners determine who is responsible for follow-up.

HANDOFF

Send the right payload to the right system.

CSV exports, saved presets, webhook destinations, Follow Up Boss–style payloads, and HubSpot-friendly layouts give teams a practical path into existing tools.

WHAT AIRES KEEPS

The Hub preserves the context the CRM usually loses.

- Visitor journey and source context before the form was submitted.
- Project, listing, community, registration event, and campaign identifiers.
- Assigned agent, team, fallback owner, and routing history.
- Smart List state, first-contact risk, overdue tasks, and status changes.
- Broker-friendly AI summary and recommended next step.
- Delivery logs, retry state, export presets, and CRM handoff history.

INTEGRATION PATHS

Start simple, then automate the parts that prove valuable.

CSV Export

Best for: Brokerages that still work from spreadsheets or need a simple weekly handoff.

Filtered exports can include source, project, agent, AI summary, task context, and current status.

Saved Export Presets

Best for: Teams that need different files for broker review, Follow Up Boss, HubSpot, or leadership reporting.

Column layouts can be reused so Monday reports and CRM-ready files do not need to be rebuilt every time.

Webhook/API Handoff

Best for: Teams ready to connect AIRES to an existing CRM, automation tool, or business system.

AIRES can queue delivery jobs, validate payloads, retry failures, and preserve delivery history for review.

Migration Import

Best for: Brokerages moving old spreadsheet or CRM exports into a cleaner operating workflow.

Dry-run import, mapping, duplicate handling, audit CSVs, and rollback support make onboarding less risky.

WORKS WITH THE CURRENT STACK

AIRES can hand off to familiar brokerage systems.

Follow Up Boss | HubSpot | Salesforce-style CRMs | Google Sheets | Airtable | Zapier or Make | Brokerage data warehouses | Custom API endpoints

Start with export, then automate

The cleanest first-client path is usually CSV/export plus a broker dashboard. Once the fields are confirmed, the same data can be pushed by webhook or API.

Use the CRM as the system of record when needed

AIRES does not need to replace a brokerage CRM. It can sit in front of it as the website, routing, registration, and accountability layer.

Keep credentials out of the public site

Production CRM tokens should live in secure server-side configuration, not in page markup or client-facing settings.

CRM READINESS CHECKLIST

What a brokerage should bring to the first handoff conversation.

The first integration milestone should be practical and verifiable. AIRES can begin with export, then move into automated sync once the field map, owner rules, and credential path are clear.

See the safe sample pilot path

CURRENT SYSTEM

CRM name, account owner, API/webhook availability, and whether the brokerage can export contacts or leads today.

REQUIRED FIELDS

Name, email, phone, lead source, project/listing, assigned agent, status, notes, tags, timeline, and any required custom fields.

OWNERSHIP RULES

Who should receive buyer, seller, listing, registration, and fallback leads before AIRES sends the record downstream.

DAY-ONE HANDOFF

Decide whether launch starts with filtered CSV, saved export preset, manual CRM sync, or a webhook/API destination.

CREDENTIAL PATH

Confirm who can create API keys or webhook tokens, then keep those credentials outside public pages and screenshots.

SUCCESS PROOF

Pick a first report: new leads, unassigned leads, stale follow-up, source quality, event visitors, or CRM handoff history.

FIRST LAUNCH CRM PATH

Choose the smallest handoff that proves value.

AIRES does not need to force every brokerage into the same integration on day one. The best path depends on CRM access, approval process, and how quickly the team needs a working launch.

LOWEST-FRICTION START

CSV export plus broker dashboard

Use this when the client needs to see value quickly, the CRM access path is unclear, or the team wants to approve field mapping before automation.

OPERATIONAL MIDDLE GROUND

Saved export presets and queued handoff jobs

Use this when different teams need different layouts, such as broker review, agent follow-up, Follow Up Boss import, or HubSpot import.

AUTOMATED PATH

Webhook/API destination with delivery logs

Use this after the client confirms required fields, endpoint credentials, failure handling, and who owns exceptions.

DISCOVERY PROMPTS

Questions to answer before API work begins.

1. Which CRM or spreadsheet does the brokerage use today?
2. Can the team export a sample lead/contact CSV from that system?
3. Which fields must be present before a lead is considered usable?
4. Should AIRES or the existing CRM decide the assigned agent?
5. What should happen when a sync fails or a required field is missing?
6. Who needs to receive the weekly broker accountability export?

Open CRM discovery worksheet

PLAN YOUR FIRST CRM HANDOFF

Show us the fields your team already uses.

The first integration conversation should be practical: current CRM, required fields, who owns follow-up, and whether the first milestone is export, webhook, or API sync.

CSV exports Webhook delivery Follow Up Boss HubSpot API sync

Name

Jordan Taylor

Email

Your email address

Interest

AIRES full demo

Message

Tell us what you want the site to handle.

Send Inquiry

IDX / MLS STRATEGY

Curate first. Integrate when it truly earns its keep.

AIRES does not make brokerages compete with Zillow, Homes.com, or Realtor.com. The public site stays fast and branded with curated property cards, then hands buyers to the portal detail pages they already know while the Lead Hub tracks intent and routes follow-up.

See curated listings | **View case study**

RISING HILLS

The Overlook

Agent adds one portal link and a custom hook. AIRES turns it into a branded card and tracks every click into the Hub.

View community demo

PHASE 1

Curated portal cards

Agents paste a Zillow, Homes.com, Realtor.com, or brokerage listing link, add a short hook, and publish a polished card on the public site.

- No IDX subscription required for the MVP
- Fast static pages with high-end presentation
- Journey tracking when buyers click into full property history

PHASE 2

Selective provider embeds

If a brokerage needs search, AIRES can add approved IDX widgets or provider-backed embeds where the cost, compliance rules, and user experience make sense.

- Provider comparison and approval planning
- Search isolated from the core marketing site
- Lead Hub still receives source and intent context

PHASE 3

Approved data feeds

Larger brokerages can graduate to custom adapters for MLS-approved APIs, brokerage-owned data, or vendor feeds once the business case is clear.

- Compliance-first implementation path
- Structured inventory sync and review workflows
- Analytics tied to agents, projects, and campaigns

POSITIONING

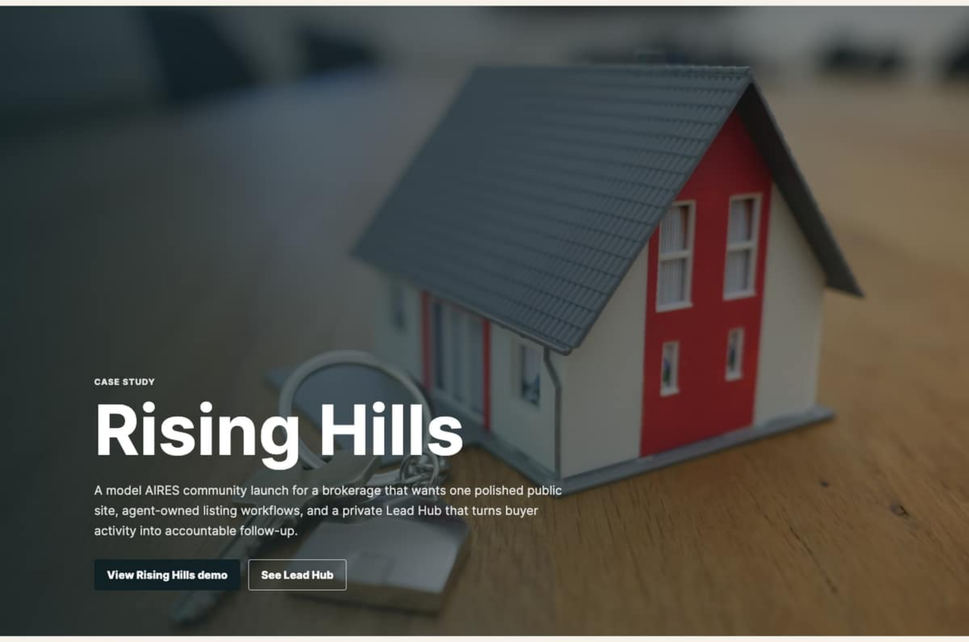
Why this is a feature, not a compromise.

Traditional IDX can be expensive, generic, and slower than a curated brokerage experience. AIRES lets the brokerage own the brand, the community story, and the lead workflow, while portal links handle full property history, disclosures, saved searches, and buyer research.

Brokerage site
Premium story, community pages, agent profile pages, curated inventory.

Portal handoff
Full property details on the interfaces buyers already use.

Lead Hub
Tracks page views, listing clicks, form starts, inquiries, routing, and follow-up.



CASE STUDY

Rising Hills

A model AIRES community launch for a brokerage that wants one polished public site, agent-owned listing workflows, and a private Lead Hub that turns buyer activity into accountable follow-up.

View Rising Hills demo | See Lead Hub

No IDX dependency
Curated cards keep the public experience fast and branded while still linking buyers to full portal details.

Agent-owned updates
Agents can maintain featured listings and profile content from a focused micro-dashboard.

Clear buyer intent
The Hub shows page views, listing clicks, form starts, and inquiry context before follow-up.

Brokerage control
Leadership can assign leads, override routing, and keep every community inquiry accountable.

BEFORE AIRES

Community marketing split across tools.

- Brokerage site with scattered community content
- IDX or portal links treated as the main property experience
- Manual listing updates handled by staff or a developer
- No clear site map for buyers exploring one community
- Generic contact forms with limited source context
- Agent follow-up happening outside the website system

AFTER AIRES

A community site connected to an operating layer.

- Fast edge-hosted Rising Hills community site
- Editorial sitemap with overview, listings, homesites, neighborhood, agents, and Lead Hub paths
- Curated listing cards that link to Zillow, Homes.com, or Realtor.com for full property history
- Agent profile pages and micro-dashboards for listing updates and direct leads
- Lead Hub with journey tracking, assignment controls, routing rules, and AI-drafted follow-up
- Managed support plan for hosting, maintenance, updates, and ongoing improvements

WHAT CHANGED

Rising Hills becomes the showroom and the workflow.

Instead of forcing buyers through a generic search interface, AIRES presents Rising Hills as a curated community experience. Listing cards link to the property portals buyers already trust, while the Hub captures what they viewed, clicked, and requested.

Community page

Curated listing card

Portal handoff

Lead capture

Hub routing

Agent follow-up

PAIN POINTS SOLVED

Built around the work brokerages actually need.

- IDX-style search can feel slow, generic, and expensive for a boutique community launch.
- Agents need a simple way to feature listings without learning a complicated CMS.
- Brokerage leadership needs routing control without hiding leads in inboxes and spreadsheets.
- Buyer intent is hard to read when the team only sees a name, email, and short message.
- New communities need to look high-end quickly while still feeding an operational follow-up system.

LAUNCH PATH

How a brokerage gets from idea to demo-ready.

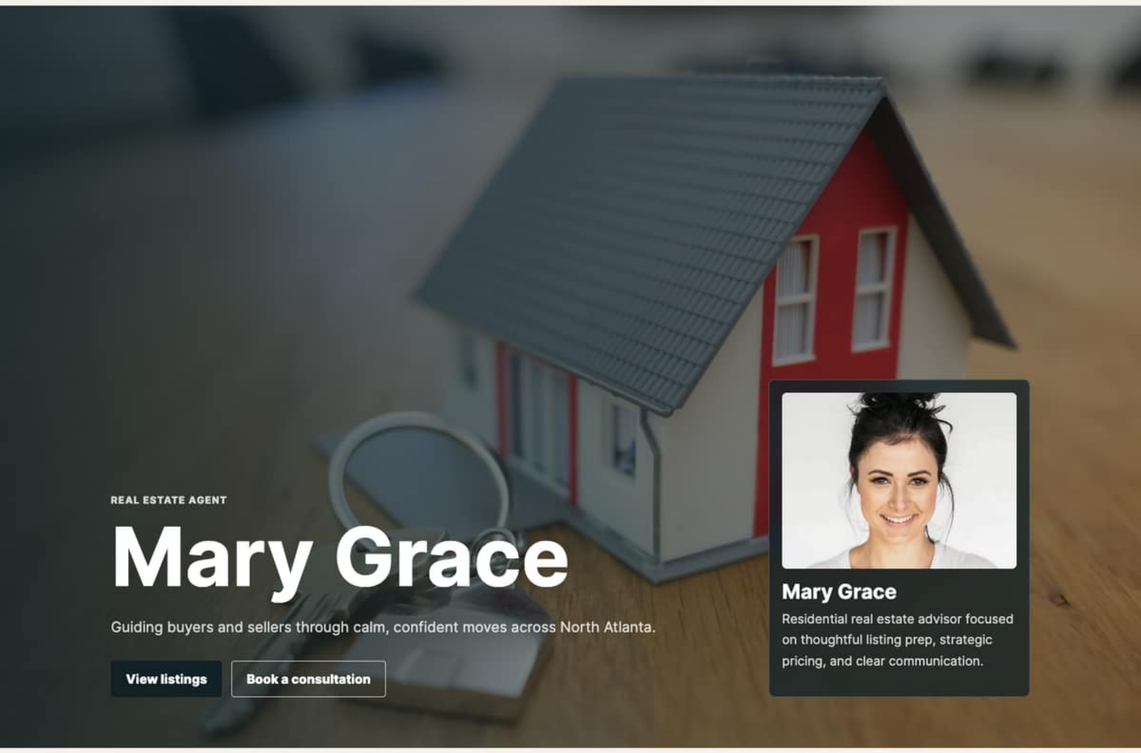
1. Define Rising Hills positioning, buyer paths, and community sitemap
2. Load initial homes, lots, amenities, and preferred portal links
3. Set up brokerage agents, profile pages, and agent dashboard credentials
4. Configure project routing rules and direct agent ownership
5. Connect all public forms and listing clicks to the Lead Hub journey record
6. Launch, monitor lead quality, and expand with automation, analytics, and new agent tools

DEMO PACKAGE

Use Rising Hills as the client-facing proof.

Show a broker the public community page first, then open the Hub to reveal routing, assignment, visitor journey, agent portals, and follow-up tools behind the scenes.

Open the Hub workflow



REAL ESTATE AGENT

Mary Grace

Guiding buyers and sellers through calm, confident moves across North Atlanta.

View listings | Book a consultation

Mary Grace

Residential real estate advisor focused on thoughtful listing prep, strategic pricing, and clear communication.

AGENT POSITIONING

Personal brand, listings, and lead capture in one focused site.

This demo shows how AIRES can be right-sized for an individual agent with a small but active listing portfolio. The experience stays personal while still supporting listing pages, inquiry tracking, and buyer/seller lead paths.

01
Listing marketing

Feature active homes with property detail pages, photo galleries, and inquiry links.

02
Buyer guidance

Capture buyer intent by area, budget, timeline, and property type.

03
Seller strategy

Invite valuation requests and listing-prep conversations from homeowners.

FEATURED LISTINGS

Three active opportunities.

Only one listing detail page is complete for this first pass. The other two listings show how a small agent portfolio can be presented cleanly.

Featured listing

Oak Hill Residence

184 Oak Hill Drive
Roswell, GA

PRICE	BEDS
$875,000	4
BATHS	SQ FT
3.5	3,280

Move-in ready | Private backyard | Finished terrace

View listing

New listing

Willow Park Townhome

42 Willow Park Lane
Alpharetta, GA

PRICE	BEDS
$525,000	3
BATHS	SQ FT
2.5	2,040

Townhome | Walkable location | Low maintenance

Detail page coming next

Investment-friendly

Garden View Condo

909 Garden View Court
Atlanta, GA

PRICE	BEDS
$389,000	2
BATHS	SQ FT
2	1,360

Condo | Secure parking | Updated interiors

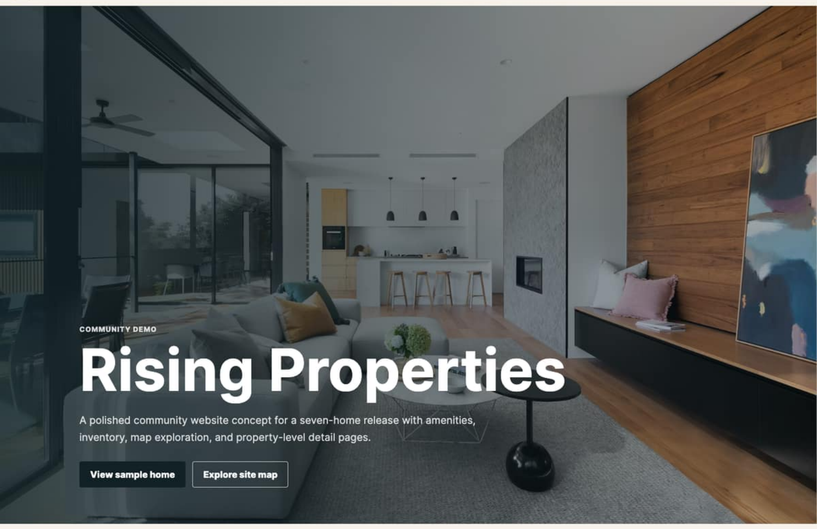
Detail page coming next

LEAD PATHS

Simple calls to action for buyers and sellers.

For individual agents, the lead system can start lightweight: listing inquiries, buyer consults, seller valuation requests, and neighborhood questions.

Tour Oak Hill Residence | Request home value



COMMUNITY DEMO

Rising Properties

A polished community website concept for a seven-home release with amenities, inventory, map exploration, and property-level detail pages.

View sample home | Explore site map

COMMUNITY LIVING

Built around everyday recreation.

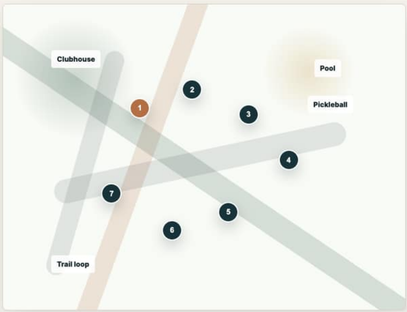
Rising Properties is framed as a residential community with a resort-style pool, pickleball courts, clubhouse, and connected biking and walking trails.

- Resort-style pool
- Pickleball courts
- Clubhouse
- Biking and walking trails

INTERACTIVE SITE MAP

Seven homesites, one completed example.

Click a homesite marker to see listing details. Grace is wired to a full property details page; the other six are placeholders for the next build pass.



SELECTED HOMESITE

Grace

Finished home near the clubhouse with a main-level guest suite, open kitchen, covered rear porch, and direct trail access.

PRICE	BEDS
$612,400	4
BATHS	SQ FT
3.5	2,850

STATUS
Available now

Property details

AVAILABLE HOMES

Inventory preview

Only one property detail page is complete for this first review. The remaining homes are represented as inventory cards and map points.

Available now
Grace
112 Rising Ridge Lane
Homesite 12

PRICE	BEDS
$612,400	4
BATHS	SQ FT
3.5	2,850

View details

Under construction
Harmony
118 Rising Ridge Lane
Homesite 18

PRICE	BEDS
$584,900	4
BATHS	SQ FT
3	2,610

Details coming next

Foundation stage
Haven
121 Rising Ridge Lane
Homesite 21

PRICE	BEDS
$639,500	5
BATHS	SQ FT
4	3,120

Details coming next

Available soon
Mercy
126 Clubhouse Bend
Homesite 26

PRICE	BEDS
$598,750	4
BATHS	SQ FT
3	2,720

Details coming next

Under construction
Serenity
131 Trail Marker Way
Homesite 31

PRICE	BEDS
$557,300	3
BATHS	SQ FT
2.5	2,260

Details coming next

Framing
Jubilee
135 Trail Marker Way
Homesite 35

PRICE	BEDS
$626,900	4
BATHS	SQ FT
3.5	2,940

Details coming next

Coming soon
Promise
139 Trail Marker Way
Homesite 39

PRICE	BEDS
$671,200	5
BATHS	SQ FT
4.5	3,340

Details coming next

POST-DEMO DECISION PATH

Turn a good demo into the right first proposal.

After a broker understands the public Rising Hills site and private Lead Hub, the next move is not more explanation. It is choosing the first launch track, collecting the right inputs, and turning the conversation into a scoped proposal.

Build proposal | First Launch Plan | CRM worksheet | Launch intake

USE AFTER THE WALKTHROUGH

Pick the smallest launch that proves the operating system.

One focused approval path beats a vague "this is interesting" follow-up.

PROPOSAL TRACKS

Choose the offer that matches the client's first proof point.

TRACK 1 — $12k–$18k initial build

Community Launch

A brokerage that wants to prove AIRES with one community, neighborhood, listing campaign, or model-home workflow.

- One branded public launch site
- Curated featured listings and portal handoffs
- Request-demo or registration capture
- Lead Hub inbox and broker dashboard
- Basic routing, CSV/export, and launch checklist

CORE OPERATIONS SUPPORT

Collect one community story, listing links, roster, routing owner, and day-one CRM/export path.

TRACK 2 — $18k–$35k initial build

Brokerage Growth

A team that wants the first launch plus agent pages, agent portal rollout, Smart Lists, stronger reporting, and repeatable routing.

- Everything in Community Launch
- Agent profiles and agent-scoped Hub views
- Smart Lists and follow-up queues
- Registration/event workflow
- Saved export presets and CRM handoff planning

SCALE & AGENT GROWTH SUPPORT

Collect roster details, profile assets, lead ownership rules, registration use cases, and reporting expectations.

TRACK 3 — $35k+ scoped rollout

Multi-Community OS

A brokerage that wants AIRES to become the reusable operating layer across multiple communities, teams, events, and CRM workflows.

- Multi-community launch structure
- Client modules, feature flags, and launch checklist controls
- Advanced routing and team permissions
- CRM/webhook/API integration planning
- Phased rollout roadmap and support cadence

CUSTOM ENTERPRISE OR SCALE SUPPORT

Define the first phase, client/account structure, module boundaries, CRM credential path, and rollout governance.

DECISION INPUTS

Six answers make the proposal concrete.

First launch focus
Which one community, listing campaign, agent team, registration event, or brokerage workflow should prove the system first?

Decision owner
Who can approve the build package, support tier, timeline, public-site content, Hub access, and CRM/export path?

Success metric
What should the first launch prove: more captured inquiries, faster routing, cleaner follow-up, better event registration, or broker accountability?

Day-one handoff
Should launch start with broker dashboard, CSV export, saved preset, CRM handoff job, webhook/API planning, or weekly report?

Agent scope
Is this a broker-only workflow first, or should agents receive their own profiles, portals, queues, and listing tools on day one?

Support model
Does the client need Core Operations support, Scale & Agent Growth support, or a larger custom rollout cadence?

CLOSE SEQUENCE

Move from interest to a scoped next step.

1 **Choose a track**
Pick Community Launch, Brokerage Growth, or Multi-Community OS based on the first proof point.

2 **Collect launch inputs**
Use the launch-intake form and First Launch Plan to gather brand, roster, listing, routing, CRM, and support details.

3 **Build the proposal**
Use the Proposal Builder preset that matches the selected track, then adjust price range, modules, timeline, and assumptions.

4 **Confirm next meeting**
Schedule a scope review with the decision owner and define what is needed to approve the first milestone.

APPROVAL PACKET

Leave the call with decisions, owners, and proof.

This is the bridge between a strong demo and a sendable proposal. Each item should have an owner, a decision, and a proof point before the final package goes out.

AIRES + DECISION OWNER
Launch package
Decision: Community Launch, Brokerage Growth, or Multi-Community OS.
Proof: Match the package to the smallest public site plus Hub workflow that proves value.

BROKERAGE SPONSOR
Support tier
Decision: Core Operations, Scale & Agent Growth, or custom enterprise support.
Proof: Confirm monthly hosting, maintenance, updates, and response expectations before proposal send.

OPS OR CRM OWNER
CRM/export path
Decision: CSV export first, saved export preset, queued handoff job, webhook, or API sync discovery.
Proof: Use the CRM worksheet to capture fields, credentials, sample data, and failure-handling needs.

BROKER ADMIN
Access model
Decision: Who gets owner, broker admin, reviewer, team, and agent access on day one.
Proof: Named Hub accounts replace shared demo access after session login proof and client approval.

MANAGING BROKER
First success metric
Decision: Registrations captured, routed leads, follow-up speed, agent accountability, or reporting clarity.
Proof: Tie the first launch to one metric that can be reviewed in the Broker Dashboard.

DECISION OWNER
Approval timing
Decision: Scope review date, milestone approval, launch target, and post-launch check-in.
Proof: The proposal should close with the exact next meeting and what must be provided before build setup.

SEND-READY OUTPUT

What should exist before the follow-up email goes out.

01 **Recommended package**
One selected track with initial build range, included modules, and monthly support tier.

02 **First launch inputs**
Community story, roster, listing links, routing rules, CRM/export needs, access roles, and timeline.

03 **Proposal send packet**
Proposal Builder summary, print/PDF view, follow-up email, and decision-owner ask.

04 **Launch readiness path**
Client-safe guide, First Launch Plan, CRM worksheet, and protected Hub screen-share plan.

Build the proposal packet | Open First Launch Plan | Open CRM worksheet

COMMON DECISION POINTS

Keep the close practical.

Do we have to replace our CRM?
No. The first launch can use broker dashboard plus CSV/export. API or webhook sync can come later once fields, credentials, and failure handling are clear.

Do we need IDX on day one?
No. Start curated: listing links, community story, and high-quality calls to action. IDX/MLS can be scoped later if it materially improves the workflow.

Will agents actually use it?
The first agent rollout should be small and focused: their own leads, tasks, profile, and featured links, without exposing global brokerage settings.

How do we avoid another one-off website?
AIRES is structured as a reusable client layer: branding, modules, feature flags, agents, routing, support package, and roadmap live as repeatable operating controls.

FOLLOW-UP GENERATOR

Draft the post-demo email before the momentum fades.

Choose the recommended track, add the client context, and copy a polished follow-up with the right links and next-step ask.

Client / brokerage
Rising Hills Realty

First launch focus
Rising Hills community launch

Recommended track
Community Launch

Decision owner
Managing broker / launch sponsor

Proposed next meeting
a 30-minute scope review this week

Day-one handoff
broker dashboard plus CSV/export

Subject
AIRES next step: Community Launch for Rising Hills Realty

Email

Hi [Name],

Thank you again for walking through the AIRES demo.

Based on the conversation, I think the cleanest next step for Rising Hills Realty is to frame Rising Hills community launch as a Community Launch. That gives us a practical first milestone around one focused community, listing campaign, or registration workflow, without trying to overbuild the first version.

Recommended path:

1. Confirm Managing broker / launch sponsor as the approval owner.
2. Use broker dashboard plus CSV/export as the day-one lead handoff.
3. Collect the launch inputs: brand assets, community or listing details, agent roster, routing rules, CRM/export needs, and support package preference.
4. Review a scoped proposal for the first launch.

Helpful links:

Copy email | Open email draft

RECOMMENDED NEXT MOVE

Send one clear follow-up: track, inputs, proposal review.

The post-demo follow-up should name the recommended track, ask for the launch inputs, and schedule the proposal review. That keeps AIRES positioned as a system they can approve, not a neat demo they might revisit later.

Open Proposal Builder | CRM worksheet | Back to Demo Guide

CRM DISCOVERY WORKSHEET

Scope CRM handoff without overpromising sync.

Use this after the Working Demo or Post-Call Recap to confirm what day one should support: dashboard proof, CSV/export, saved preset, import preview, or a scoped webhook/API discovery path.

CRM strategy | Decision path | Proposal Builder

PRE-INTEGRATION RULE

Start with fields, ownership, and proof before credentials.

Once the field map and day-one handoff are clear, credentials can move into Worker secrets or the approved client secret path.

LAUNCH BOUNDARY

Separate day-one proof from later CRM/API sync.

DAY ONE
Dashboard proof, clean CSV/export preset, mapped required fields, and owner-confirmed routing.

AFTER SCOPE LOCK
Saved CRM preset, handoff job, import preview, webhook/API discovery, and credential review.

NOT BEFORE APPROVAL
Production tokens, live API writes, historical migration, custom field cleanup, or CRM-side automation changes.

POST-CALL HANDOFF FIT

Use this worksheet only when CRM affects the first proposal.

USE IT WHEN
The first launch needs CRM, spreadsheet, inbox, or reporting handoff clarity before proposal approval.

DO NOT USE IT FOR
Collecting production credentials, full exports, historic migrations, or API write access before scope lock.

OUTPUT
A day-one handoff decision: dashboard only, CSV/export first, saved preset, import preview, or later API/webhook discovery.

DISCOVERY MAP

Work through these six areas before scoping sync.

Current system and owner

CRM / DATABASE
Follow Up Boss, HubSpot, Google Sheet, custom CRM, none

CRM OWNER
Who can export data, approve fields, or create API/webhook credentials?

CURRENT PAIN
What breaks today: missed routing, duplicate entry, slow follow-up, poor reporting, unclear source data?

Day-one export fields

CONTACT FIELDS
Name, email, phone, address, preferred contact method

LEAD CONTEXT
Source, project/listing, community, campaign, registration event, visitor journey

SALES FIELDS
Status, priority, assigned agent, tags, notes, timeline, budget, lead type

Ownership and routing

ASSIGNMENT OWNER
Should AIRES or the CRM decide the assigned agent?

ROUTING RULES
Project, listing, territory, event, source, team, fallback owner

EXCEPTION HANDLING
What happens when a lead has no match or missing required fields?

Day-one handoff boundary

PREFERRED START
Broker dashboard, CSV export, saved preset, CRM handoff job, or webhook/API planning

EXPORT SAMPLE
Can the client provide a sample CSV export with non-sensitive or test data?

SUCCESS REPORT
New leads, unassigned leads, stale follow-up, source quality, event visitors, handoff history

API credential path

ACCESS METHOD
API key, OAuth app, webhook URL, Zapier/Make, manual import/export

SECRET OWNER
Who creates and rotates credentials?

SECURITY NOTES
Required approvals, IP allowlists, sandbox accounts, compliance constraints

Migration scope

IMPORT SOURCE
Existing CRM export, spreadsheet, Google Sheet, archived leads

DUPLICATE BEHAVIOR
Skip duplicate emails, update existing records, or create separate records

ROLLBACK NEEDS
Should imported test batches be archived or reversible during onboarding?

COPYABLE WORKSHEET

Fill this out during discovery, then copy the summary.

This tool is browser-local. It does not save client CRM details to AIRES.

Client / brokerage
Rising Hills Realty

Current CRM or database
Follow Up Boss / spreadsheet export

CRM owner / technical contact
Broker admin or operations lead

Preferred day-one handoff
Broker dashboard only

Day-one export boundary
Launch with broker dashboard proof and CSV export first. Hold live CRM/API writes until fields, owner, duplicate behavior, and credential path are approved.

Required fields
Name, email, phone, source, project/listing, assigned agent, status, notes, timeline, tags

Routing ownership
AIRES assigns by project/listing first, then agent/team, then fallback broker owner.

Assignment source of truth
AIRES is the first-launch routing source of truth. CRM assignment rules can be mapped after export proof and field approval.

Export/import sample needed
Request a sample CRM export with test or non-sensitive rows before final field mapping.

Duplicate behavior
Use email as the first duplicate key. Confirm whether imports should skip duplicates, update existing records, or create separate records before migration.

Credential path
Confirm who can create API keys/webhook URLs. Store production tokens in Worker secrets or approved secret storage, not public pages.

Success proof
First report should show new leads, assigned owner, source/project context, and handoff/export history.

Open questions
Which CRM fields are required? Who owns failed syncs? Should duplicate emails update existing records?

Summary

```
AIRES CRM Discovery Worksheet

Client / brokerage:
Rising Hills Realty

Current CRM or database:
Follow Up Boss / spreadsheet export

CRM owner / technical contact:
Broker admin or operations lead

Preferred day-one handoff:
Broker dashboard only

Day-one export boundary:
Launch with broker dashboard proof and CSV export first. Hold live CRM/API writes until fields, owner, duplicate behavior, and credential path are approved.

Required fields:
Name, email, phone, source, project/listing, assigned agent, status, notes, timeline, tags

Routing ownership:
AIRES assigns by project/listing first, then agent/team, then fallback broker owner.

Assignment source of truth:
AIRES is the first-launch routing source of truth. CRM assignment rules can be mapped after export proof and field approval.

Export/import sample needed:
Request a sample CRM export with test or non-sensitive rows before final field mapping.

Duplicate behavior:
```

Copy worksheet | Open email draft

SCOPE-LOCK CHECKLIST

- ☐ Target CRM/export owner confirmed
- ☐ Required lead fields named
- ☐ Assignment source of truth chosen
- ☐ Fallback owner chosen
- ☐ Sample export requested
- ☐ Duplicate behavior defined
- ☐ Credential owner identified
- ☐ Success report agreed

HOW TO USE IT

Turn CRM uncertainty into a scoped first milestone.

If the worksheet is incomplete, start with dashboard proof plus CSV/export. If the field map and credential owner are clear, scope a saved preset, webhook, or API handoff. If the client has old leads to preserve, start with a migration import preview after duplicate behavior is approved.

Choose proposal track | First Launch Plan

POST-CALL RECAP

Send the follow-up while the demo is still fresh.

Use this after the walkthrough to turn the client's launch idea, CRM/export path, and decision timing into a polished recap email and proposal next step.

Decision Room | Monday Handoff | Monday Demo Link | Proposal Builder | Decision Path

BEST USE

Close with decisions, not vague interest.

Capture the client's words, first use case, CRM path, and approval owner before the conversation cools off.

- Which first launch should AIRES scope?
- Who owns approval and launch inputs?
- What CRM/export path should day one support?

RECAP INPUTS

Fill in the few details that make the follow-up feel specific.

Client / brokerage: Rising Hills Realty

Contact name: [Name]

Recommended track: Community Launch

First launch idea: one focused Rising Hills community launch

Decision owner: managing broker / launch sponsor

Success metric: visible follow-up accountability for first community leads

CRM / export path: CSV export first, then CRM/API sync discovery

Approval timing: scope review this week, milestone approval next

What resonated on the call:

Rising Hills showed how one public community website can connect directly into private lead routing, agent follow-up, broker accountability, registration workflows, and CRM/export readiness.

Next ask:

Please confirm the first launch focus, decision owner, target launch window, roster, listing links, routing rules, CRM/export needs, named-access model, support tier, and first success metric.

COPY-READY EMAIL

Recap email

Refresh

Subject

AIRES recap and next steps for Rising Hills Realty

Body

Hi [Name],

Thanks again for taking a look at the AIRES working demo.

The best post-demo link to review or forward is the Client Decision Room:
https://useaires.com/sales-deck/client-decision-room/

My read from the walkthrough is that Community Launch is the best first path for Rising Hills Realty: one focused Rising Hills community launch.

What seemed most relevant from the call:
Rising Hills showed how one public community website can connect directly into private lead routing, agent follow-up, broker accountability, registration workflows, and CRM/export readiness.

Recommended first-launch direction:
- Package track: Community Launch
- First launch focus: one focused Rising Hills community launch
- Decision owner: managing broker / launch sponsor
- First success metric: visible follow-up accountability for first community leads
- CRM/export path: CSV export first, then CRM/API sync discovery
- Approval timing: scope review this week, milestone approval next

Copy recap | Open email draft

RECAP-TO-PROPOSAL CLOSEOUT

Use one closeout path after the call.

Once the recap inputs are filled in, use this sequence to send the follow-up, point the client to the right decision room, and open a prefilled proposal draft without retyping the same details.

RECORD
Meeting Tracker first
Capture decision owner, launch fit, next touch, proposal track, support tier, CRM/export path, and whether the client email was sent.

RECAP
Send one follow-up note
Use this page to generate the recap while the client's exact launch idea and objections are still fresh.

PROPOSE
Move to Proposal Review
Send Monday Handoff first, then Proposal Review only after the recap and scope lock clarify first launch focus, approval owner, CRM/export path, and support package.

ARCHIVE
Save proof in the Hub
Use the Launch Artifact Vault after proposal movement to keep approval packets, handoff exports, access proof, and support records together.

1. Send recap
Use the generated recap email to anchor the conversation in the client's first launch idea and decision owner.

2. Open Monday Handoff
Give the client one follow-up index for What You Get, Decision Room, Scope Lock, CRM worksheet, Proposal Review, and first-launch inputs.

3. Build proposal
Open the generated proposal link so package, CRM/export path, access model, success metric, and timing are already filled in.

4. Record outcome
After sending the recap or proposal, record the durable Monday outcome in the private Meeting Tracker.

Open Decision Room | Open Monday Handoff | Open generated proposal | Record Hub outcome

Generated proposal link: https://useaires.com/sales-deck/proposal-builder/?client=Rising+Hills+Realty&community=one+focused+Rising+Hills+community+launch&package=Community+Launch&support=Core+Operations&timeline=Standard+launch&decision_owner=managing+broker+%2F+launch+sponsor&success_metric=visible+follow-up+accountability+for+first+community+leads&handoff_path=Broker+dashboard+%2B+CSV+export&crm_path=CSV+export+first%2C+then+CRM%2FAPI+sync+discovery&access_model=Owner+%2B+broker+admin+%2B+agents&approval_timing=scope+review+this+week%2C+milestone+approval+next&assumptions=First+launch+focus+from+post-call+recap%3A+one+focused+Rising+Hills+community+launch.&next_steps=Please+confirm+the+first+launch+focus%2C+decision+owner%2C+target+launch+window%2C+roster%2C+listing+links%2C+routing+rules%2C+CRM%2Fexport+needs%2C+named-access+model%2C+support+tier%2C+and+first+success+metric.&modules=Public+community+website%7CCurated+featured+listings%7CLead+Hub+inbox%7CBroker+accountability+dashboard%7CCMS-lite+registration+and+QR%7CSmart+Lists%7CReports+and+CSV+presets

POST-CALL COMMAND LINKS

Record, recap, propose, archive.

Use these in order after the walkthrough. Client-facing links stay public; private Hub links stay internal operator actions.

Monday Handoff
Client-safe post-demo index for recap, Decision Room, Scope Lock, CRM worksheet, Proposal Review, and First Launch Plan.
Open

Record Meeting Outcome
Durable private Hub record for the call outcome, next touch, proposal stage, and follow-up owner.
Open

Client Decision Room
Client-safe follow-up room for recap links, decision questions, CRM worksheet, and first-launch inputs.
Open

Proposal Review
Single client-facing approval path once scope, support tier, access model, and CRM/export path are clear.
Open

Proposal PDF View
Print or save the formal proposal after the proposal builder has the right assumptions.
Open

Launch Artifact Vault
Protected archive for approval packets, handoff packets, CRM/import proof, access exports, and support readiness.
Open

APPROVAL PACKET

Make sure the follow-up asks for decisions, not vague interest.

- First launch focus
- Decision owner
- Success metric
- CRM/export path
- Access model
- Approval timing

LINKS INCLUDED

The recap points them back to the right assets.

Monday Handoff
https://useaires.com/sales-deck/monday-handoff/

Client Decision Room
https://useaires.com/sales-deck/client-decision-room/

What You Get
https://useaires.com/sales-deck/what-you-get/

Scope Lock Handoff
https://useaires.com/sales-deck/scope-lock-handoff/

Monday Demo Link
https://useaires.com/sales-deck/monday-demo-link/

Rising Hills Client Preview
https://useaires.com/rising-hills/#client-preview

Lead Hub Overview
https://useaires.com/lead-hub/

Rising Hills Brief
https://useaires.com/sales-deck/rising-hills-brief/

First Launch Plan
https://useaires.com/sales-deck/first-launch-plan/

Post-Demo Decision Path
https://useaires.com/sales-deck/post-demo-decision/

Sample Proposal Builder
https://useaires.com/sales-deck/proposal-builder/?client=Rising%20Hills%20Realty&community=Rising%20Hills&crm_path=CSV%20export%20first&access_model=Owner%20%2B%20broker%20admin%20%2B%20agents&approval_timing=Scope%20review%20after%20Monday%20demo

Public Screenshots PDF
https://useaires.com/sales-deck/useaires-front-end-current.pdf

CLIENT DECISION ROOM

Turn the AIRES demo into a clear first launch.

This is the client-safe follow-up link after the walkthrough. It recaps what AIRES proved, helps the decision owner choose the first launch path, and lists the inputs needed for a scoped proposal.

Open Proposal Review | Open Scope Lock | Choose proposal track

What You Get | Open First Launch Plan | Open CRM worksheet

BEST NEXT MOVE

Pick one first launch that proves the operating system.

Start focused. Then expand agents, communities, routing, reporting, and CRM sync after the first workflow is working.

WHAT THE DEMO PROVED

AIRES is the public site plus the private operating layer.

Public launch site

A focused community or campaign site that can tell the local story, show curated listings, collect inquiries, and avoid heavy IDX scope on day one.

Private Lead Hub

A broker operating layer for capture, journey context, assignment, Smart Lists, agent queues, registration events, exports, and accountability.

Scalable client layer

Branding, domains, modules, plan tier, support package, feature flags, agents, routing, and CRM/export decisions are managed per brokerage.

AFTER-DEMO HANDOFF PATH

Recap, decide, scope, approve.

1. Recap

Review What You Get so the value is clear in plain language.

2. Decide

Choose the first launch track and decision owner in this room.

3. Scope

Use First Launch Plan and the CRM worksheet only for inputs that affect scope.

4. Approve

Move to Scope Lock, then Proposal Review after launch boundary, support tier, and CRM/export posture are clear.

CHOOSE A PATH

Pick the first proposal track.

BEST FIRST PILOT

Community Launch

Launch one community, project, registration flow, or listing campaign with lead capture, routing, reporting, and a support package.

Approve the first community, content assets, roster, routing rules, and target launch date.

TEAM EXPANSION

Brokerage Growth

Add agent profile pages, agent portals, curated listing links, Smart Lists, accountability reporting, and repeatable follow-up processes.

Confirm the roster, agent access model, listing-link workflow, support tier, and broker reporting needs.

SCALE PATH

Multi-Community OS

Use the central AIRES engine across multiple communities, domains, modules, clients, feature flags, and CRM/export workflows.

Define the first three launches, governance owner, data boundaries, support cadence, and integration roadmap.

REVIEW PACKET

Open these materials after the walkthrough.

Proposal Review

Use the single approval path that gathers the proposal, decision room, CRM worksheet, and first-launch checklist into one client-facing review.

Open review

What You Get

Use the plain-English leave-behind to review the full system: public site, Lead Hub, routing, agent portals, dashboard, launch support, and roadmap.

Open recap

Monday Demo Link

Revisit the same client-safe starting point: Working Demo first, then Rising Hills, Lead Hub overview, pricing, and optional screenshots.

Open demo link

Rising Hills Brief

Use the short leave-behind to review the community-site concept, Hub workflow, and business case.

Open brief

Post-Demo Decision Path

Compare Community Launch, Brokerage Growth, and Multi-Community OS before selecting the first proposal path.

Choose track

Scope Lock Handoff

Use the scope-lock checkpoint to confirm launch track, decision owner, support tier, CRM boundary, access model, and success metric.

Open scope lock

CRM Discovery Worksheet

Capture the current CRM/export process, required fields, routing owner, credential path, and day-one handoff.

Open worksheet

First Launch Plan

Collect the community, roster, listing links, routing rules, support tier, and timeline needed for scope review.

Open plan

Request Full Demo

Share first-launch notes when the brokerage is ready for a scoped follow-up or proposal review.

Send inputs

DECISION QUESTIONS

Bring these answers to proposal review.

1. **Which one community, listing campaign, agent group, or registration workflow should AIRES prove first?**
2. **Who owns approval for the build package, monthly support package, Hub access, CRM/export path, and timeline?**
3. **What existing CRM, spreadsheet, inbox, or reporting process should AIRES support on day one?**
4. **Which agents, teams, or lead types need routing immediately?**
5. **What would make the first launch a clear win: more captured leads, faster response, better reporting, cleaner routing, or agent accountability?**
6. **What date should we use for scope review, approval, and target launch?**

APPROVAL CHECKLIST

What the first proposal should lock down.

PACKAGE	SUPPORT	PUBLIC SITE	HUB USERS
Community Launch, Brokerage Growth, or Multi-Community OS.	**Core Operations, Scale & Agent Growth, or a custom support cadence.**	**Community story, images, listing links, map/sitemap context, and calls to action.**	**Owner, broker admin, staff, agents, and any read-only reviewers.**

ROUTING	CRM/EXPORT	SUCCESS METRIC	TIMELINE
Lead sources, listing/community ownership, agent/team assignment, and exception rules.	**CSV/export first, saved preset, import path, webhook/API discovery, or no CRM on day one.**	**The one operating outcome the first launch should prove.**	**Scope review, content handoff, build milestone, QA, launch, and first check-in.**

RECOMMENDED NEXT STEPS

Keep the decision path simple.

1

Review the same demo path

Use the Monday Demo Link and Rising Hills Brief to make sure the first-launch idea is grounded in a real brokerage use case.

2

Choose the first launch track

Pick the smallest package that proves value without over-scoping the first project.

3

Complete the decision inputs

Confirm owner, support package, CRM/export path, roster, routing rules, launch assets, and target timing.

4

Schedule proposal review

Use the proposal review to confirm scope, assumptions, exclusions, monthly support, and the first success metric.

READY FOR SCOPE REVIEW

Send the first launch inputs when the decision owner is ready.

Request Full Demo

AIRES RECAP

What a brokerage gets with AIRES.

AIRES combines a fast public website with a private operating layer for capture, routing, agent follow-up, broker accountability, launch setup, and support. Start with one focused launch, prove the workflow, then scale into more agents, communities, and integrations.

Open Decision Room | Open Scope Lock | Open Working Demo | Print / save PDF

BEST FIRST MOVE

Launch one focused community or campaign first.

That gives the client a real public example and gives the brokerage proof that the Hub can turn interest into accountable follow-up.

INCLUDED SYSTEM

Public demand plus private operations.

Public community or campaign site
A polished public experience for a community, project, listing campaign, agent group, or registration workflow with clear calls to action and fast edge hosting.

Curated listings and local content
Featured properties, community story, listing-link handoff, neighborhood context, and lead capture without forcing the first launch into a heavy IDX rebuild.

Lead capture with context
Forms capture the inquiry, source path, journey context, selected interest, listing/community signal, and follow-up priority so the Hub starts with useful context.

Private Lead Hub
A broker-facing operating layer for inbox review, lead detail, status, priority, assignment, notes, Smart Lists, exports, and follow-up accountability.

Routing and ownership
Route by community, listing, project, agent, team, lead type, registration source, or manual override, with owner visibility and queue health.

Agent portals
Role-based agent views let each team member focus on their own leads, follow-up queues, profile needs, and assigned opportunities without seeing broker-only controls.

Broker accountability dashboard
Management views show what is new, assigned, overdue, unowned, high priority, recently contacted, and ready for export or escalation.

Registration and event capture
Model-home, open-house, or launch-event registration can feed the same Hub with QR-ready capture, visitor lists, follow-up queues, and export proof.

CRM and export path
Start with clean CSV/export proof, then move into API, webhook, or provider-specific sync once the field map and client process are known.

Launch and support system
Scope review, launch intake, checklist ownership, security review, go-live handoff, support package, and recurring maintenance sit around the first launch.

FIRST LAUNCH PACKAGE

How the demo becomes a real client launch.

1. Choose the first launch
Pick one community, project, agent group, listing campaign, or registration workflow to prove value quickly.

2. Lock the inputs
Confirm branding, domain, content, images, agent roster, listing links, routing rules, CRM/export path, and approval owner.

3. Build the public path
Launch the public site or campaign pages with the correct calls to action and client-safe copy.

4. Configure the Hub
Set up lead capture, routing, Smart Lists, users, agent access, reporting views, and export proof.

5. QA and go live
Test the public forms, private Hub, role access, emails, routing, exports, and launch handoff before sending traffic.

6. Support and expand
Use the recurring support package to monitor, update, refine, add agents, add communities, and roll new features into the system.

AFTER-CALL DECISION SEQUENCE

Use one recap path before asking for approval.

1. Recap
Use this page to explain what the brokerage actually gets: public launch site, private Hub, routing, accountability, CRM/export path, and support.

2. Decide
Open the Decision Room to choose Community Launch, Brokerage Growth, or Multi-Community OS as the first proposal track.

3. Scope
Complete the First Launch Plan and CRM worksheet only after the first launch idea and decision owner are clear.

4. Approve
Turn the agreed first launch, support package, access model, success metric, and timeline into the proposal review.

AFTER-DEMO HANDOFF PATH

Recap, decide, scope, approve.

Use this order after the live walkthrough so the client gets one clear follow-up path instead of a stack of unrelated links.

RECAP

Send What You Get
Use this page as the plain-English leave-behind after the walkthrough. It explains the public site, Hub, routing, agents, reporting, CRM/export path, launch support, and roadmap.

DECIDE

Open the Decision Room
Choose the first launch track and confirm the decision owner before asking for proposal approval.

SCOPE

Use the CRM worksheet only if data handoff matters
Keep day-one CRM practical: dashboard proof and CSV/export first, API or webhook later if the worksheet proves it is needed.

APPROVE

Move to Proposal Review
Once package, support tier, access model, launch boundary, CRM/export path, and success metric are clear, use Scope Lock Handoff and then Proposal Review as the approval path.

WHAT WE NEED

Inputs that make the first launch real.

- Brokerage or community name
- Brand assets, colors, logo, and domain preference
- Approved community, listing, or campaign copy
- Featured listing links and property images
- Agent roster, roles, emails, phone numbers, and profile links
- Routing rules by community, listing, project, team, and fallback owner
- CRM, spreadsheet, inbox, or reporting process to support first
- Support package, launch owner, approval timing, and first success metric

ROADMAP

Built to start small and scale cleanly.

Phase 1: Focused launch
One public launch, Lead Hub capture, assignment, Smart Lists, agent queue, broker dashboard, exports, and support.

Phase 2: Brokerage growth
Agent pages, agent micro-dashboards, curated listing submission, richer follow-up workflows, registration events, and reporting.

Phase 3: Operating system
Multi-client settings, feature flags, stronger authentication, deeper CRM sync, governance, import/export templates, and reusable launch playbooks.

REVIEW LINKS

Use these after the walkthrough.

Working Demo
/sales-deck/working-demo/

Rising Hills Case Study
/rising-hills/#client-preview

Lead Hub Overview
/lead-hub/

First Launch Plan
/sales-deck/first-launch-plan/

Decision Room
/sales-deck/client-decision-room/

Scope Lock Handoff
/sales-deck/scope-lock-handoff/

Request Full Demo
/contact/?interest=First%20community%20launch

NEXT DECISION

Choose the first launch and support package.

Request Full Demo

Once the first launch focus, roster, routing rules, CRM/export path, and approval timing are confirmed, AIRES can turn the demo into a scoped proposal.

CLIENT-SAFE MONDAY INVITE

Send one link. Set one clear expectation.

This is the clean client-facing invite package: one required Client Email Landing Page, a simple 10-minute review path, and a clear note that the private Hub will be shown live.

Open Email Page | Open optional PDF

CLIENT RULE

The Client Email Landing Page is the only required pre-call link.

Do not include protected Hub links in the client invite. The private Hub should be reviewed live first, then role-specific access can be created intentionally.

COPY-READY EMAIL

Send this before the walkthrough.

This version is client-safe: no admin links, no credentials, no internal command pages, and no protected Hub shortcuts.

Subject

AIRES working demo: Rising Hills and Lead Hub

Email

Hi [Name],

I wanted to send over the AIRES working demo before our walkthrough.

Start here:
https://useaires.com/sales-deck/monday-client-email/

That is the only link you need before the call. It opens a short prep page with the Monday Demo Link as the first action.

Direct demo link:
https://useaires.com/sales-deck/monday-demo-link/

The demo link opens a short review page with the Working Demo as the first action:

1. View the Rising Hills public website
2. Review the Lead Hub overview
3. Bring one real launch idea to discuss

After 10 minutes, you should have a clear picture of what a brokerage gets:

- A polished community or campaign website
- Lead capture that preserves visitor context
- A private Hub for routing, agent follow-up, accountability, and CRM/export readiness
- A launch path that can start with one community, agent group, listing campaign, or registration workflow

Suggested 10-minute prep:

- 3 minutes: view Rising Hills
- 4 minutes: review the Lead Hub overview
- 3 minutes: think about the first community, listing campaign, agent group, registration workflow, or routing problem you would want to test first

Copy invite | Open email draft

CLIENT INSTRUCTIONS

What they should do before the call.

01
Start here

Open the Working Demo

This is the first action inside the Monday Demo Link. It gives the prospect the Rising Hills example, Lead Hub overview, and first-launch prompt.

Open Working Demo

02
10 minutes

Review the public path

They should see how a community website, curated listings, registration flow, and request path can become a brokerage launch.

Open Rising Hills

03
Before the call

Bring one launch idea

Ask them to think about one community, listing campaign, agent group, registration workflow, or routing problem worth testing first.

Open request path

WHAT THE WALKTHROUGH WILL COVER

Use the demo to connect the public site to the private workflow.

The Working Demo is meant to make the live walkthrough faster. Review the public story first, then use the call to ask how AIRES would route, track, and report on your real leads.

Public launch

We will start with the Rising Hills example so you can see how a focused community, listing campaign, or registration path could look.

Private workflow

Jackson will then screen-share the protected Hub so the inbox, routing, agent ownership, reporting, and follow-up workflow are clear.

First-launch scope

The call should end with one practical launch idea, one owner or decision path, and the CRM/export questions AIRES needs to support.

WHAT THE PROSPECT SHOULD UNDERSTAND

Four takeaways from the Working Demo.

Public experience

A polished community or campaign site that can replace a fragile, generic web presence with a focused brokerage launch.

Lead context

Forms and visitor behavior become useful context for routing, follow-up, agent ownership, and broker accountability.

Private operating layer

The Hub is shown live on the walkthrough so protected workflows make sense before any role-specific access is created.

Scalable path

The first launch can start small, then expand into more communities, agents, registration workflows, CRM handoff, and support.

SAFE LINKS

Use these only if they ask for more.

Client Email Landing Page
/sales-deck/monday-client-email/

Monday Client Instructions
/sales-deck/monday-client-instructions/

Working Demo
/sales-deck/working-demo/

Rising Hills Preview
/rising-hills/#client-preview

Lead Hub Overview
/lead-hub/

Public Screenshots PDF
/sales-deck/useaires-front-end-current.pdf

First Launch Plan
/sales-deck/first-launch-plan/

Request Full Demo
/contact/?interest=Request%20Full%20Demo%20for%20Rising%20Hills

CLIENT-SAFE MONDAY SEND KIT

Generate the email. Send the clean path.

This version is safe to use for client prep: public demo links, no protected Hub shortcuts, no login details, and one clear ask before the walkthrough.

Open Email Page | Open Client Demo Guide | Open public PDF

SEND RULE

The Client Email Landing Page is the only required pre-call link.

Everything else supports the conversation. The private Hub is explained publicly first, then guided live during the walkthrough.

EMAIL GENERATOR

Customize the client email.

Fill in only what you know. The generator keeps the send path simple and public-safe.

Recipient name

[Name]

Brokerage or client

your team

First launch idea

one community, agent group, lis

Main CRM/reporting question

Which CRM, spreadsheet, or rep

Refresh email

Generated email

```
Hi [Name],

I wanted to send over the AIRES working demo before our walkthrough.

Start here:
https://useaires.com/sales-deck/monday-demo-link/

That is the only required link before the call. It opens a short review page for your team with the Working Demo as the first action:

1. View the Rising Hills public website
2. Review the Lead Hub overview
3. Bring one real launch idea to discuss

After 10 minutes, you should have a clear picture of what a brokerage gets:

- A polished community or campaign website
- Lead capture that preserves visitor context
- A private Hub for routing, agent follow-up, accountability, and CRM/export readiness
- A launch path that can start with one community, agent group, listing campaign, or registration workflow

For our walkthrough, I will guide the private Hub live so the dashboard, lead inbox, routing, Smart Lists, agent portal, registration workflow, reports, launch checklist, and follow-up path make sense in context.
```

Copy email | Open email draft

CLIENT-SAFE LINKS

What can go in the email or follow-up.

Client email landing page

The clean first client link with the short prep path, Monday Demo Link primary action, and no internal send tools.

Open Email Page

Primary action inside prep page

Use this as the primary action inside the Client Email Landing Page; the page starts with the Working Demo as the primary action.

Open Demo Link

Client-safe guide

Use as supporting detail when the client wants a deeper self-guided explanation.

Open Client Demo Guide

Rising Hills case study

Concrete community-site example for public website, listings, registration, and Hub story.

Open Rising Hills

Lead Hub overview

Public explanation of capture, routing, agent views, follow-up, and accountability.

Open Lead Hub

First Launch Plan

Private-scoping path for launch, support, CRM/export, and first success metric.

Open plan

Visual backup

Optional current public screenshots PDF for skim review or backup.

Open PDF

Post-demo leave-behind

Send after the walkthrough when the client needs the full AIRES system, launch package, inputs, and roadmap in one printable page.

Open What You Get

CLIENT INSTRUCTIONS

How they should navigate.

What to click first

Start with the Working Demo. The rest of the links are supporting material, not homework.

What to look for

Notice how the public site, form path, visitor context, private Hub, agent workflow, and CRM/export path connect.

What to bring

Bring one practical first-launch idea: community, project, listing campaign, registration workflow, or routing problem.

SAFETY GUARDRAILS

Keep the first touch clean.

- **Send the Client Email Landing Page as the only required pre-call link.**
- **Keep the Monday Demo Link as the primary action inside the Client Email page.**
- **Keep the public screenshots PDF optional.**
- **Do not send private Hub access before the guided walkthrough.**
- **Use the private Hub as a live screen-share segment after the client understands the public path.**
- **After the call, send What You Get, then move into the Decision Room, CRM worksheet, and proposal path.**

AIRES WORKING DEMO

Start here before the walkthrough

This page keeps the first touch simple: open the Working Demo, skim the Rising Hills example, and bring one practical launch idea. No login details or private Hub access are needed before the guided demo.

BEFORE THE CALL

Plan for about 10 minutes.

Review the public story first. The private Hub will be screen-shared live so the workflow makes sense in context.

Start the Working Demo | Open optional PDF

START HERE

One page. Ten minutes. One launch idea.

Use this as the simple pre-call path. The private Hub will be shown live during the walkthrough, so the only job before the call is to understand the public story and bring one real example.

1. **Open the Working Demo**
   Start here. This is the short public walkthrough of the AIRES idea.
2. **Notice the Rising Hills path**
   Look for how a community site turns interest into a focused first-launch conversation.
3. **Bring one real use case**
   A community, listing campaign, event, agent group, or routing problem is enough.

Start the Working Demo

DIRECT LINK GUARDRAIL

This is the fallback path, not the only client send.

Use the Client Email Landing Page as the first URL when possible. This direct page is for quick review, forwarded links, or clients who ask for the shortest path.

BEST SEND
Client Email Landing Page first
The cleanest pre-call send is still the landing page. This direct demo link is the main button inside that page, not a replacement for the full first touch.

FALLBACK USE
Use this page when they ask for the shortest path
If a client wants the quick version, this page keeps the review to the Working Demo, Rising Hills, Lead Hub overview, CRM pilot path, and one launch idea.

PRIVATE ACCESS
Hub access remains guided
No admin or agent login is needed here. The private Hub is shown live first, then role-based access can be issued after scope is intentional.

Open the preferred starting page

GUIDED DEMO SPINE

Public site, Hub workflow, first launch, next decision.

This is the entire demo story in plain language. Review the public path first; Jackson will guide the private Hub live so the operating workflow does not feel abstract.

PUBLIC STORY
See the Rising Hills launch
Start with the public community example so the brokerage-owner feels concrete before the Hub is discussed.

OPERATING LAYER
Understand what the Hub controls
Review the Lead Hub overview at a high level. The private dashboard, lead inbox, routing, and agent views will be screen-shared live.

FIRST LAUNCH
Choose one practical use case
Bring one community, event, listing campaign, agent group, or lead-routing problem that would make the first launch valuable.

DATA HANDOFF
Review the CRM pilot boundary
If the first launch needs CRM/export support, AIRES starts with a safe 5-10 row sample before requesting deeper access.

NEXT DECISION
Leave with a scoped path
After the walkthrough, the follow-up should identify the launch owner, support tier, CRM/export path, and approval timing.

SUGGESTED PATH

What to open, what to look for, and why it matters.

01
2 minutes
Start with the Working Demo
This is the main pre-call path. It explains Rising Hills, the Lead Hub, the first-launch question, and what the live walkthrough will cover.
Open Working Demo

02
3 minutes
Open the Rising Hills example
Review the sample community website, curated listing cards, registration path, and brokerage story as a concrete first-launch example.
Open Rising Hills

03
3 minutes
Review the Lead Hub walkthrough
See the send, click, share, close walkthrough and how website inquiries can become assigned leads with visitor context, Smart Lists, follow-up visibility, agent queues, and CRM/export readiness.
Open Lead Hub

04
2 minutes
Skim the CRM pilot path
If CRM or data handoff matters, review how AIRES tests one small export sample before any full export, API credential, or recurring sync.
Open CRM Pilot Path

05
2 minutes
Bring one launch idea
Think about one community, project, listing campaign, registration workflow, agent group, or routing issue worth using as the first AIRES launch.
Open request form

WHAT AIRES DEMONSTRATES

A website connected to an operating layer.

A public launch site
AIRES can package a focused community, project, listing campaign, or brokerage initiative as a polished public experience.

Lead context
Visitor activity and form details become useful context for routing, assignment, follow-up, and broker visibility.

A private operating layer
The Hub is where the brokerage manages leads, agents, Smart Lists, registration workflows, reporting, and CRM/export handoff.

A safe CRM pilot path
The first data step can start with a tiny sample export so the brokerage proves field mapping and duplicate logic before production movement.

A scalable model
The first launch can start small, then grow into more communities, agents, feature flags, support packages, and multi-client operations.

BRING TO THE WALKTHROUGH

One real launch idea is enough.

The live call is most useful when it connects the demo to a real brokerage problem. These questions help turn the walkthrough into a launch scope.

- **Which community, project, agent group, or listing campaign would you launch first?**
- **Who should own new buyer, seller, registration, and listing leads?**
- **Which CRM, spreadsheet, or reporting process would AIRES need to support?**

AFTER THE WALKTHROUGH

What happens if AIRES feels like a fit.

The demo should lead to a practical next step, not a vague "looks good." If there is interest, the follow-up path is simple and scoped around one first launch.

Receive a recap
After the walkthrough, you can review a short summary of what AIRES would launch first, what the Hub would track, and what decisions are still open.

Confirm the first launch
The next step is choosing one community, campaign, registration workflow, or agent group that would prove the most value first.

Map the handoff
AIRES can start with clean CSV/export handoff, then scope CRM or API sync once the current process and required fields are clear.

Review a proposal path
The launch scope can turn into a first-build package, support plan, timeline, and approval checklist before any production work begins.

SAFE REVIEW LINKS

Use these if you want to explore more.

Working Demo
/sales-deck/working-demo/

Rising Hills
/rising-hills/#client-preview

Lead Hub Walkthrough
/lead-hub/#walkthrough

CRM Pilot Path
/crm-pilot-path/

First Launch Plan
/sales-deck/first-launch-plan/

Request Full Demo
/contact?intent=Request%20Full%20Demo%20for%20Rising%20Hills

Optional Screenshots PDF
/sales-deck/assets/re-front-end-current.pdf

AIRES MONDAY DEMO

Review one link before the walkthrough.

AIRES is a brokerage website system connected to a private Lead Hub. The public site creates demand and captures intent; the Hub turns that activity into accountable routing, agent ownership, and follow-up.

Open Monday Demo Link | Open screenshots PDF

BEFORE THE CALL

This prep page is the only required pre-call link.

No private Hub login is needed before the walkthrough. The protected workflow will be screen-shared live. Protected Hub access stays guided by screen share until roles are intentional.

START HERE

One clean review path.

Start here

The primary action inside this prep page. It starts with the Working Demo and keeps the review short.

Open Monday Demo Link

Optional visual backup

Use only if you want to skim the full public experience before the guided walkthrough.

Open screenshots PDF

CLIENT PREP LOCK

One public starting point. No login burden.

The walkthrough is easier when the client receives one public starting page, not a list of admin, agent, PDF, proposal, and dashboard links.

REQUIRED PRE-CALL LINK

Use this page as the only URL in the first email

The client starts here, then chooses the Monday Demo Link from this page. This keeps the first touch clean and prevents a bundle of links from feeling like homework.

DIRECT DEMO LINK

Keep it as a button, not the first send

The Monday Demo Link is still useful, but it works best as the primary action inside this landing page or as a fallback if the client asks for the shortest possible path.

PRIVATE HUB

No credentials before the walkthrough

The protected Hub is shown by screen share first. Role-based access only comes later, after the client understands what each role should see.

10-MINUTE PREP

What to review.

3 min

View Rising Hills

Review the sample community launch and the curated public path a brokerage could receive.

4 min

Review Lead Hub

Understand how inquiries become routed, assigned, tracked, and prepared for follow-up.

2 min

Skim CRM Pilot Path

See how AIRES can test CRM/export movement with one small sample before requesting deeper access.

3 min

Bring one launch idea

Think about one community, agent group, listing campaign, registration workflow, or routing problem worth testing first.

WHAT TO NOTICE

You do not need to study every page.

Can the public site create a real conversation?

Look at how Rising Hills turns a community, listings, registration, and calls to action into a focused launch path.

Can the brokerage see what happens after the form?

The live walkthrough will show how the Hub captures context, assigns ownership, tracks status, and keeps follow-up visible.

Can this start small and scale?

Use the demo to imagine one first community, team, agent group, event, or listing campaign before expanding the operating system.

Can the CRM path be tested safely?

The CRM Pilot Path explains how AIRES starts with a 5-10 row sample before full export, API credentials, or recurring sync.

WHAT AIRES DOES

Website plus operating layer.

After the short review, the live walkthrough will connect the public Rising Hills experience to the private Lead Hub workflow.

- Polished community or campaign website
- Lead capture that preserves visitor context
- Private Hub for routing, agent ownership, and accountability
- Smart Lists and follow-up visibility
- Agent-focused lead portals
- CRM/export readiness and launch support
- Safe sample-first CRM pilot before production sync

LIVE WALKTHROUGH

What Jackson will show.

Public site

We will start with the Rising Hills example so the website, listing, registration, and lead-capture path feels concrete.

Private Hub

The protected Hub will be screen-shared live so the lead inbox, routing, Smart Lists, agent queues, and broker dashboard make sense in context.

First launch

The goal is to leave with one practical first launch idea, one decision owner, and the CRM/export questions AIRES needs to support.

CRM pilot boundary

If CRM handoff is in scope, we will show how the sample-first path proves mapping and duplicate handling before production access.

HOW TO NAVIGATE

Send, click, share, close.

This is the same path used on the Lead Hub walkthrough page: public review first, private Hub live, one first-launch decision at the end.

SEND

Start with this prep page

This page stays the only required pre-call link. It keeps the first review focused and client-safe.

CLICK

Open Rising Hills and Lead Hub

Rising Hills shows the public brokerage/community site. Lead Hub explains the operating layer that takes over after the form.

SHARE

Watch the private Hub live

The protected Hub will be screen-shared during the walkthrough so dashboard, lead inbox, routing, agent portal, and CRM/export readiness make sense together.

CLOSE

Choose one first launch

The best next step is one specific community, listing campaign, agent group, event, or routing problem to test first.

HELPFUL QUESTIONS

Bring one practical example.

1. Which community, project, agent group, or listing campaign would you launch first?
2. Who should own buyer, seller, registration, and listing leads?
3. Which CRM, spreadsheet, or reporting process would AIRES need to support?

SAFE SUPPORTING LINKS

Use only if helpful.

Working Demo
/sales-deck/working-demo/

Rising Hills Case Study
/rising-hills/#client-preview

Lead Hub Overview
/lead-hub/

CRM Pilot Path
/crm-pilot-path/

First Launch Plan
/sales-deck/first-launch-plan/

Request Full Demo
/contact/?interest=Request%20Full%20Demo%20for%20Rising%20Hills

MONDAY PRESENTER START

Open this first.

One operator screen for the client link, private Hub tabs, 20-minute talk track, proof beats, close questions, and after-call actions.

Open client link | Open Hub first | Open Proposal Review

RUN RULE

Send one link. Show the Hub live. Close into one first launch.

Keep optional collateral behind you, not in front of the client. The story should feel guided, not like homework.

MONDAY DEMO FLIGHT PLAN

Send. Open. Show. Close.

Use this as the short operator script before the deeper tab list. It keeps the client path simple and the protected Hub walkthrough intentional.

01 **Send**
Client Email Landing Page only. The Monday Demo Link remains the primary action inside it.

02 **Open**
Presenter Start, Working Demo, Rising Hills, and Broker Dashboard Presenter Mode before the call begins.

03 **Show**
Dashboard, Lead Inbox, Routing, Smart Lists, Scope Lock, and Artifact Vault as one protected Hub story.

04 **Close**
Record Meeting Tracker outcome, then send Proposal Review after first launch scope and owner are clear.

PRESENTER DEMO SPINE

Same story, operator version.

Use this spine to keep the live call focused: public story, Hub workflow, first launch, decision path. Every tab below should serve one of these four moves.

Public story
Start with Rising Hills
Show the community website as the first-launch example before opening private Hub screens.
Public pages

Hub workflow
Move into accountability
Screen-share dashboard, lead inbox, routing, Smart Lists, registration, reports, and launch controls as one operating layer.
Protected walkthrough

First launch
Map the real use case
Ask for the first community, event, listing campaign, agent group, or routing problem that should become the pilot scope.
Scope discussion

Decision path
Close into proof
Record the meeting outcome, archive proof, send the recap, and use Proposal Review only after the owner and scope are clear.
Recap and approval

OPEN TABS IN ORDER

Nine tabs. No wandering.

01 **Client pre-call link**
Use this as the only required client link before the walkthrough.
Open Demo Link

02 **Working Demo**
Start the public story here after the client lands on the demo link.
Open Working Demo

03 **Rising Hills case study**
Show the community launch, curated listing path, and registration/lead capture story.
Open Rising Hills

04 **Broker Dashboard**
Sign in before the call; screen-share this as the first protected Hub view.
Open Dashboard

05 **Lead Inbox**
Show captured lead context, routing, assignment, AI insight, and response controls.
Open Lead Inbox

06 **Routing and Smart Lists**
Prove project/listing ownership, team queues, overrides, and follow-up visibility.
Open Routing

07 **Scope Lock**
Move the demo into production setup: owners, launch tasks, exports, and approval handoff.
Open Scope Lock

08 **Artifact Vault**
Use this after the close path to show where approval packets, CRM/import proof, access exports, and handoff artifacts are archived.
Open Artifact Vault

09 **Proposal Review**
Use this as the single client-facing approval path after the walkthrough.
Open Proposal Review

20-MINUTE TALK TRACK

Say this, then move.

0-3 min — **Frame the system**
AIRES is not just a website. The public site creates intent, and the Hub makes follow-up accountable.
Show: Monday Demo Link, Working Demo

3-8 min — **Show the first launch**
Rising Hills is the example of what a brokerage gets first: a branded community launch, curated property path, and lead capture.
Show: Rising Hills Case Study

8-14 min — **Reveal the operating layer**
This is where the broker sees who owns the lead, what the visitor did, what follow-up is due, and where opportunities are getting stuck.
Show: Broker Dashboard, Lead Inbox, Routing

14-18 min — **Prove production setup**
Scope Lock turns the demo into launch work: owners, access, routing, CRM/export questions, and a go-live checklist.
Show: Scope Lock, Meeting Tracker

18-20 min — **Close into the first launch**
The right next step is one focused launch, not boiling the ocean. Pick the first community, owner, routing rules, CRM path, support tier, and success metric, then archive the launch proof in the Artifact Vault.
Show: Proposal Review, Artifact Vault

PROOF BEATS

Make these obvious.

- The client only needs one pre-call link.
- Protected Hub access stays guided by screen share until roles are intentional.
- Lead context shows source, journey, routing, assignment, priority, and response actions.
- Broker accountability shows stale work, follow-up risk, command email proof, Smart Lists, and next actions.
- Launch setup is tracked through Scope Lock, launch intake tasks, exports, and go-live handoff.
- Artifact Vault shows where approvals, CRM/import packets, access proof, and handoff exports live after the walkthrough.
- Proposal Review is the clean approval path after the live walkthrough.

CLOSE QUESTIONS

End with the first launch.

1. What is the first community, listing campaign, agent group, or event workflow you would launch?
2. Who owns buyer, seller, registration, and listing leads?
3. What CRM, spreadsheet, or reporting process has to work on day one?
4. Who is the decision owner for launch scope, support tier, and approval timing?
5. What measurable outcome would prove the first launch worked?

AFTER THE CALL

Record, recap, propose.

Record outcome | Open Artifact Vault | Write recap | Send Proposal Review | Build proposal packet | Open Final Send Packet

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

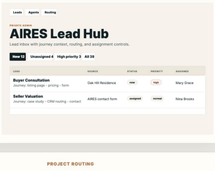
AI Insight: Buyer reviewed Oak Hill listing content before submitting. Prioritize a specific, property-aware follow-up.

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 | Work email

Phone | Brokerage or team

Team size | Primary goal

1-5 agents | 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

AI 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

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

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

Hub support: support@useares.com

Rising Hills Laundry Group

Laundries across Rising Hills · Scale & Agent Growth · Some tasks

Back to Directory Go to Foodstuff Artificial Intelligence Meetings Leads Agents Routing

6 Total leads 1 need attention

4 Active leads 2 awaiting reply

2 Agents 1 active today

0 Listings 0 live

0 Routing rules 0 currently active

0 Intakes 0 awaiting review

Lead Intake and Qualification Assistant

Work the client from intake post to handoff

This is the external operator path after the Rate Brokerage Setup Wizard creates a workspace. It turns the dashboard's generic intro into a client-launch decision flow.

Setup 4/8 complete

Launch checklist Workspace setup before inviting teammates

Data 80% ready

4 of 5 connected

Rate sheets, lanes, and historical loads

Agents 4/8 live

Quote, dispatch, and support agents

Forecast 3/4 ready

Pre-shipper demand signals

Go live 3/4 ready

Workspace records

Setup checklist

Launch checklist

Complete the items below before inviting teammates.

Workspace created

Name, timezone, and base currency are set.

Rate sheets imported

At least one carrier rate sheet has been uploaded and mapped.

Lanes configured

Origin and destination pairs are defined for your top 10 lanes.

Fuel surcharge table

Current fuel surcharge schedule is loaded and active.

Quote agent enabled

Quote agent is live and responding to inbound requests.

Dispatch agent enabled

Dispatch agent is live and assigning loads to drivers.

Support agent enabled

Support agent is live and handling customer inquiries.

Forecast data connected

Pre-shipper demand signals are flowing into the forecast.

Team members invited

At least one teammate has been invited to the workspace.

Data sources

Connect the systems your agents will read from and write to.

Rate sheets

Carrier rate sheets, lane tables, and historical load data.

Ready · Review refresh

Fuel surcharge tables

Current and historical fuel surcharge schedules.

Ready · Open table

Customer contracts

Negotiated rates, terms, and service commitments.

Ready · Open library

Pre-shipper demand signals

Forecasted volume from upstream shippers.

Ready · Manage access

Carrier directory

Approved carriers, lanes, and contact info.

Ready · Open CRM

Historical load data

Past loads for lane analysis and forecasting.

Ready · Open table

Customer directory

Shippers, consignees, and account info.

Ready · Open table

Agents

Configure the agents that will work your inbox.

Quote agent

Drafts rate responses from your rate sheets and lane history.

Ready · Review setup

Dispatch agent

Assigns loads to drivers based on lane, equipment, and availability.

Ready · Open rules

Support agent

Handles customer inquiries, tracking updates, and exceptions.

Ready · Open CRM

Forecast agent

Aggregates pre-shipper demand signals into lane-level forecasts.

Ready · Open chart

Go live

Workspace records

Rate sheets, lanes, fuel surcharges, and contracts are ready.

Ready · Open table

Agents tested

Quote, dispatch, and support agents have been validated.

Ready · Open table

Team invited

Operators and dispatchers have access to the workspace.

Ready · Open table

Launch workspace

Activate the workspace and start accepting live loads.

Ready · Open table

Intake Qualification Assistant

Work the client from intake post to handoff

This is the external operator path on /agents/intake. It turns the dashboard's generic intro into a guided workspace for the intake AI's setup and agent list

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 restored 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.

- 01 — Client Dashboard — Start with the client workspace, launch checklist, CRM readiness, branding, and account snapshot. — Ready
- 02 — Launch Wizard — Frame the transition from demo to paid launch with setup progress, blockers, access proof, and handoff summary. — Review
- 03 — 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
- 04 — Lead Inbox — 6 active leads available for inbox filters, assignment, status, and bulk actions. — Ready
- 05 — Lead Detail — Show Rising Hills Visitor with source context, timeline, tasks, notes, and follow-up. — Ready
- 06 — CRM Readiness — 71% ready: destinations, credentials, approval, exports/imports, sync jobs, and delivery proof. — Ready
- 07 — Registration Event — 1 active event for QR, open-house, model-home, or sales-center capture. — Ready
- 08 — Agent Portal — 2 active agents ready for agent-specific lead queues and follow-up work. — Ready
- 09 — 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.

- 01 — ONE-LINE 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 [illegible]. — Open Working Demo — Client guide — Rising Hills
- 02 — 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 [illegible]. — Open Launch Wizard — Lead inbox — Dashboard
- 03 — 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
- 04 — 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
- 05 — 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

Hub support: support@useaires.com

AI

ARIES Lead Hub
ADMIN CONSOLE · POWERED BY ARIES

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

GO-LIVE HANDOFF

Rising Hills Realty Group

usaaires.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.

9/12 checks passed | **1** critical blockers | **Handoff** gate contrast

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
- [ ] 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 FINALIZED
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 Who gets access — 0 pending invitations.

Invite link — What gets sent: One-time setup link from Hub Users; no token shown here.

Scale & Agent Growth — Support package: support@usaaires.com

5 Session proof — 0 fallback uses logged.

7 records — Archive before sending credentials: Access, credential, cleanup, provisioning, support, approval, private gate.

71% 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 9/12 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@usaaires.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** 1 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 9/12 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% (9/12 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.
- Named access path: Owner missing; broker-admin path exists.
- Session login proof: 5 successful Hub sign-ins; 0 owner proof archive records.
- Fallback removal approval: 1 approved maintenance windows; 0 shared fallback uses in loaded proof.
- Client isolation proof: Client Isolation Proof Packet is generated from protected scoped-read, scoped-write, lead/export, and agent-boundary proof.
- Credential archive: Credential Handoff Packet and Access Cutover Packet are available for owner-only archive.
- Final invite send decision: Record the owner send-or-hold decision from Hub Users before creating final invitations.
- Post-cutover verification: Future proof: record only after ALLOW_BASIC_AUTH_FALLBACK=false is deployed and shared fallback is rejected.

Copy named access finalization | 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 9/12 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:
- Owner account finalization: Record permanent owner, broker-admin, recovery, credentials-note, and temporary-account cleanup proof.
- Named access path: Owner missing; broker-admin path exists.
- Session login proof: 5 successful Hub sign-ins; 0 owner proof archive records.
- Fallback removal approval: 1 approved maintenance windows; 0 shared fallback uses in loaded proof.
- Client isolation proof: Client Isolation Proof Packet is generated from protected scoped-read, scoped-write, lead/export, and agent-boundary proof.
- Credential archive: Credential Handoff Packet and Access Cutover Packet are available for owner-only archive.
- Final invite send decision: Record the owner send-or-hold decision from Hub Users before creating final invitations.
- Post-cutover verification: Future proof: record only after ALLOW_BASIC_AUTH_FALLBACK=false is deployed and shared fallback is rejected.

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% Checklist — 8 of 10 launch items.

71% CRM ready — CRM in progress

1 Hub users — 0 pending invites.

464 Session proof — 0 fallback uses.

6 Active leads — 6 total leads.

3 Modules — Enabled modules.

Ready
Launch checklist
8 of 10 items complete.
Open

Ready
Access readiness
1 users · 0 invites, 464 sign-ins.
Open

Review
Lead/routing proof
6 leads, 0 uses, 0 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
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, readiness, 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: usaaires.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 path: send the Client Demo Guide first, review once the protected Hub, confirm first launch scope, then move into

Copy go-live handoff

Hub support: support@usaaires.com

AR ARES Lead Hub
ADMIN CONSOLE · POWERED BY ARES

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

ARTIFACT ARCHIVE 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 | Go-live 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.

5/12 checks passed | 1 critical blockers | Handoff gate contract

- 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 — Partner or registration capture is marked ready. — Review
- Lead proof — 8 total leads available for proof. — Review
- CRM/export readiness — 71% ready · The CRM/export 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 launch gate is ready. — Open checklist

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

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

LAUNCH APPROVAL PACKET
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% Readiness score — 9 of 12 launch checks.
1 Go-live approvals — Latest: Approved With Conditions.
0 CRM imports — No import jobs yet.
2 Import completions — 2 closeout packet(s) in CRM readiness.
20 Access events — Recent access-related session sign-in(s).
80% Checklist — 8 of 10 launch items.

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

SCOPE CLEANUP AND CLIENT HANDOFF
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 Cleanup ready — Checklist items that already have enough proof.
1 Needs review — Items to review before sharing named client access.
TXT Packet — Printable cleanup and handoff summary.

- 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 rosters, test-like 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), 80% launch checklist. Archive packets before changing demo data. — Ready — Open Artifact Vault
- Confirm named-access boundary — 1 partner user(s), 0 session sign-in(s). A named rollout exercise(s). Verify named access before removing demo-only credentials. — Ready — Review Hub users
- Confirm launch-task handoff — 8 open launch task(s), 0 without owner. Assign owners before client handoff. — Ready — Open task board
- Confirm CRM/export boundary — CRM in progress, 67 import preview(s), 2 import closeout(s). — Ready — Open CRM readiness
- Confirm support handoff — Scale & Agent Growth support, support@quoteleo.com. — Ready — Open Support Operations
- Run final private gate — 20 access event(s) tracked. 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 gate. Archive proof first, then make any manual lead/status/access changes from the appropriate Hub screen.

FINAL APPROVAL PACKET
Launch and approval packets

Client progress snapshot — Download and approve the client-safe progress snapshot before sharing.
Broker handoff packet — Copy-ready handoff summary, launch proof, support contact, and operator notes.
Proposal approval packet — Decision owner, package, and proposal follow-up proof.
Go-live approval packet — Latest approval: Approved With Conditions by ARES smoke test.

CREDENTIAL AND SESSION PROOF
Access and security packets

Access cutover packet — Owner access available from this session. Captures fallback phase-out, named users, sessions, and cutover plan.
Credential handoff packet — Owner access available from this session. Final owner review of credentials, access, security, support package, archive requirements, and sanitized decision.
Named client access finalization packet — Owner access available from this session. Final send-or-hold record before real brokerage access is sent.
Client isolation packet — Download the client scope, write guard, leadATShport, and agent-boundary proof before named brokerage access.
Hub access events CSV — Owner access available 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 available from this session. Credential governance, rotation, approval, and review state without exposing secrets.

MIGRATION AND HANDOFF RECORDS
CRM and import proof

CRM import planning packet — Broker CRM source, fields, owner rules, import plan, and launch handoff requirements.
Latest import approval packet — Latest import approval packet.
Ready-to-reimport packet — Corrective batch outlook for rows marked ready after failed row review.
Reconciliation packet — Push import totals, skipped/error rows, queue status, and open issue rows.
Import completion packet — Latest completion archive 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, source, 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 QUEUE
Preserve proof, review demo clutter
5 to review

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

0 Proof records — Records ready to help tell the launch/workflow story.
5 Review before access — Recent records with hold/demo signals.
0 Operator decision — Real records without a strong enough signal to 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 Model Home · Rising Hills Model Home · Jul 22, 4:12 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 Model Home · Rising Hills Model Home · Jul 22, 4:11 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 Model Home · Rising Hills Model Home · Jun 29, 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 Model Home · Rising Hills Model Home · Jun 29, 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 Model Home · Rising Hills Model Home · Jun 29, 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 Inbox or Lead Detail pages for any manual status/archive decisions.

FINAL LAUNCH ARCHIVE DECISION
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 Go-Live Approval record that tells the operator whether named client access can move forward.

7 Archive set — Required proof records before named access.
75% Readiness — 9/12 checks passed.
1 Critical blockers — Routing ownership.
Approved With Conditions — Latest approval — Jul 7, 1:44 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
- Go-Live Approval 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 checklist or hold decision confirmed
- 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/export or no-CRM boundary confirmed
- Lead capture and cleanup review confirmed

Decision notes

Needs Follow Up

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 FINAL 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 — Public demo path — Client Demo Guide and Rising Hills case study are ready. — Open
Ready — Broker-safe bundle — Download the Share Room bundle before or after the meeting. — Open
Ready — Share Room access log — Recent Share Room opens/downloads prove who reviewed the room. — Open
Ready — Final decision path — Approval Approved With Conditions. — Open

Rising Hills Realty Group private demo final archive

Use this when a serious client conversation needs a locked proof set.
Public demo path: Client Demo Guide and Rising Hills case study.
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.
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. Access Cutover and Client Isolation Packet, 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.

Copy private demo archive | Download final archive | Open Share Room | Download broker-safe bundle

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

PRIVATE GATE DETAILS ARCHIVE
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 `/pmpm-demo/private` result after public links, protected links, ETAmigration health, authenticated Hub coverage, broker-scoped CRM 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 `ALLOW_EXACT_AUTH_FALLBACK=false`. — 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: pmpm demo:production
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.
- 01 and registration health passed.
- Authenticated Hub coverage passed.
- Broker client-scoped and CSRF proof passed.
- Agent boundary proof passed.
- Access Cutover Packet is saved.

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 Go-Live Approval 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 changing DNS, email sender, CRM import, or production sync work happened.
5. Download the Access Cutover Packet, Credential Handoff Packet, and access event CSV after sessions-only 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 `/pmpm-demo/private` passes against production.
8. Save Share Room files, broker-safe bundle, and client-facing proof before the production access is removed.

Copy archive runbook

Hub support: support@quoteleo.com

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 failback 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 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
Current readiness evidence:
```

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 content, 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 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** — /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 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: private 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 detail 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. 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 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
pnm demo:session -- --base-url=https://usealres.com
pnm 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, 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: 07/08/2026, 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 across active Smart Lists	2 broker review now	0 clear	0 ownership or priority watch	0 no immediate exceptions

Manager focus

- **Rising Hills Walk-Ins** — Escalation watch · Playbook escalation rule may be active. Review owner, priority, and overdue follow-up now. — Open focus queue
- **Inside Sales First Response** — Escalation watch · Playbook escalation rule may be active. Review owner, priority, and overdue follow-up now. — Open focus queue
- **Broker Daily Digest Preview** — Plain-English morning summary generated from Smart List queue health and playbook compliance. — Preview digest

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 Needs first contact	3 Overdue follow-up	2 High priority

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

QUEUE PREVIEW

6 matching leads

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

AI **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

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

Manage Hub Users, their roles, and their access to Hub.

Hub

AI **AIRES Lead Hub**
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Share Room | Scope | Handoff | Security | Privacy | Credential Review | Reports | Meetings | Leads | Demo Pipeline | Clients | Users
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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

Hub support: support@useaires.com

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 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