Broker Dashboard Wireframes

Broker Login

* Tenant, Broker, Broker Admin all in one place?

Broker Dashboard Main Page

* Sort/Filter/Group by functionality
  + How simple/necessary is it?
  + MVP or later versions?
  + Coding effort
* Prospect/Prospect Group ID
  + Allow broker to modify at onboarding
  + Incorporate into sort/filter/group by
* Notes by Prospect/Prospect Group
* Notifications
  + Set up automatic notifications based on milestones
  + Configure by prospect group/prospect/global
* Review Uploaded Documentation
  + Accept/Approve prospects uploads
  + Organize files in standard structure/naming convention automatically
    - Customizability for organization
  + Exportability
    - Send to zip file
    - Download
* Change View/Layout
  + Allow the broker to adjust the way they view their groups of prospects. Various styles of management, number of prospect groups at a given time and personal preference lend to the need for different views

Broker Dashboard – Add Prospects Page

Broker Dashboard – Prospect Group Page - Navigated to by clicking on a prospect group on the Main Page. Area that the broker uses to manage a specific prospect group.

* Show status of documents in a table form
  + Row 1 - Actions by group
  + Additional Rows - Actions by individual prospect
* Review uploaded documentation – approve documents as correct
* Nudge/Email the prospects/group
* Tenant picture – navigate to tenant profile
* Notes
  + Notes from main page also available to edit on this page

Brokerage Administrator Dashboard – provides a broker manager to view the status of all brokers