University of California, Davis
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Est8: Real Estate Customer Relationship Management App and Website

User Guide

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1. Table of Contents

2. Preface

Welcome to the user guide for the Real Estate CRM System — a powerful, cross-platform tool designed to simplify and centralize your real estate operations. From lead organization to client engagement, this system supports every step of your workflow.

This user manual is designed to provide complete instructions for effectively using the Real Estate CRM system, a cross-platform solution to manage, track, and optimize real estate leads and property interactions. This guide will help both new and returning users understand all available features and how to use them efficiently.

Whether you're a real estate investor, agent, or part of a support team, this manual will guide you through essential tools and workflows to optimize your driving for dollars strategy, enhance productivity, and streamline your daily operations.

We hope this guide proves to be a helpful resource throughout your experience with the Real Estate CRM System. If you have any questions, suggestions, or need further assistance, please don't hesitate to reach out to our support team.

3. Overview

The Real Estate CRM System is a comprehensive platform featuring two integrated interfaces:

- A **mobile application** built for field agents and real estate investors on the go.
- A **web-based dashboard** optimized for desktop lead management and analysis.

Both interfaces are seamlessly synchronized through a secure cloud database and offer advanced functionalities such as map-based property tracking, Google account authentication, and integration with CSV and Google Sheets for streamlined data import and export.

4. Purpose of This Guide

This guide is designed to provide step-by-step instructions for using all features of the Real Estate CRM System, helping users become quickly proficient with both the mobile application and the web-based dashboard. It serves as a comprehensive reference for troubleshooting, training, and efficient system usage. Additionally, it includes technical specifications, cloud integration details, and developer resources for those interested in exploring the system's underlying architecture.

5. Target Audience

This user guide is intended for:

- Real estate investors and professionals manage off-market leads.
- Field agents gather property data while on the move.
- Sales teams need an organized database of property statuses.
- Administrative personnel are responsible for data entry and export.

Each section of this guide is tailored to help these audiences get the most from the Real Estate CRM System, whether in the field or at a desk.

6. Guide Structure

The manual is organized into logical sections to ensure ease of access:

- **Introductory Sections** explain setup, login, and system requirements.
- **Core Feature Sections** walk through the app and website functionality.
- **Reference Sections** include status explanations, data exports, and troubleshooting.

7. How to Use the Guide

This guide can be used in multiple ways:

- Start with the **Introductory Sections** to set up your account and understand basic system requirements.
- Use the **Core Feature Sections** to explore tools, learn workflows, and get feature-specific instructions.

- Refer to the **Reference Sections** for resolving issues, exporting data, or understanding key system terms.

Introductory Section

8. System Requirements

To ensure smooth and secure operation across all devices, the Real Estate CRM System requires the following specifications:

Mobile App

- **Device**: Android (API 28 or later)
- **Applications:** Expo Go App (supports Expo 52)
- **Storage**: At least 100MB free
- **Permissions**: Camera, Location, Storage, Internet
- **Account**: Google Account required

Web Platform

- **Browser**: The Latest version of Chrome, Firefox, Safari, or Edge
- **Internet**: Stable connection required
- **Account**: Google Account required

9 . Getting Started

Mobile App Installation Steps (iOS & Android)

- **Step 1:** Open the App Store (iOS) or Google Play Store (Android) on your mobile device.
- **Step 2:** Search for Expo Go using the search bar.
- **Step 3:** Select Expo Go from the search results and tap Install.
- **Step 4:** Authenticate the installation if prompted (e.g., Face ID, Touch ID, or Apple ID password on iOS).
- **Step 5:** Once installed, open Expo Go and grant all requested permissions (camera, storage, location).
- **Step 6:** On your laptop or desktop, Clone our GitHub repository.
- **Step 7:** Open the project folder in a terminal and run the following commands:
    - npm install (to install dependencies)

    - npx expo start (to start the project)
- **Step 8:** A QR code will appear in your terminal window.
- **Step 9:** Open Expo Go on your phone and scan the QR code to launch the CRM mobile app.

Accessing the Web Platform

- **Step 1:** Open a supported browser (Chrome, Firefox, Safari, or Edge).
- **Step 2:** Navigate to the provided CRM URL.
- **Step 3:** Sign in using your Google Account to access the CRM dashboard.

Mobile App Uninstallation Steps (iOS & Android)

- **Step 1:** Locate the Expo Go app on your device.
- **Step 2:**
  On iOS: Press and hold the app icon until it jiggles or a menu appears.
  On Android: Open the Settings app and navigate to Apps or Application Manager.
- **Step 3:**
  On iOS: Tap "Delete App" or the "X" icon.
  On Android: Find and select Expo Go, then tap Uninstall.
- **Step 4:** Confirm the deletion when prompted.

Core Feature Section

10. Account Creation and Authentication

- **Google OAuth Integration:** Users authenticate using a valid Google account via OAuth 2.0, ensuring secure and seamless sign-in.
- **Automatic Profile Creation:** Upon first login, a unique user profile is automatically generated and stored in the CRM database.
- **Activity Association:** All CRM interactions—including lead tracking, updates, and notes—are linked to the authenticated Google account.
- **Persistent Sessions:** Users remain signed in across sessions unless they choose to log out manually.

11. Navigating the Mobile App

Bottom Navigation Bar

Tab	Icon	Description
Home	🏠	View quick stats and access property creation
Leads	📄	View all tracked properties and manage leads
Drive	🚗	Map view to drop pins at the current location
Profile	👤	View login details and log out

12. Working with Properties in the App

Adding a Property

1. Tap **Add Property** on the Home screen.
2. Upload images using the **Camera** or **Gallery**.
   - If an image is uploaded first, the **address autofill** will attempt to extract metadata.
3. Fill in:
   - **Property Name**
   - **Owner Name**
   - **Address** (autofilled or manual)
   - **Notes** (optional)
   - **Status** (defaults to *Lead*)

4. Tap **Add Property** to save.

13. Lead Management

Quick Stats (on Home screen)

Auto-updated statistics:

- Total Leads
- Properties Contacted
- Offers Made
- Deals Closed
- Active Listings
- % of Deals Closed

Lead View Page

- Presented in a scrollable **plaque format**
- Tap any lead plaque to:
    - View detailed information
    - Edit fields or add notes
    - Update lead status
- **Search Bar**: Find leads by name or address
- **View Toggle**: Switch between **List View** and **Map View**
- **Filters**: Filter by lead status
- **Export**: Export leads to Google Sheets

14. Map & Drive Features

Map View (Leads Tab)

- Leads are shown as **interactive pins**
- A scrollable image bar at the bottom for quick access
- Tap image → map centers to that lead

Drive View (Tab)

- Opens **live map** centered on current location
- Tap the **Drop Pin** button:
    - Places a pin on your current location
    - Automatically opens the **Add Property** form
    - Autofills the address based on GPS
    - Modify or enter additional data before saving

15. Exporting and Importing Leads

Exporting (App & Web)

- Tap the **Export** button to generate and download/export a Google Sheets file.

Importing (Web Only)

- Use the **Import Leads** button (CSV/Google Sheets supported)
- Ensure the file includes:
  - Name
  - Address
  - Owner
  - Status
  - Notes (optional)
  - Image URLs (if applicable)

16. Using the Web Interface

Top Navigation Icons

Icon	Description
🧳 Briefcase	Homepage with all leads
👤 Person	Account details and quick stats
🚪 Logout	Sign out of Google account

Lead Display Modes (Top Right)

1. **Card View**: Default, three leads per row
2. **Table View**: Spreadsheet-style layout
3. **Map View**: Geographic display of properties
4. **Import**: Upload CSV or Google Sheet
5. **Export**: Export current leads
6. **Add Lead**: Green **"+"** icon

Card Layout (Each Lead)

- Name (top-left), Status (top-right)
- Center: Image carousel

- Below:
  - Location
  - Owner
  - Notes
- Bottom Buttons:
  - **View in Maps**
  - **View Details**
  - **Delete (Trash Icon)**

Reference Section

17. Account and Data Management

Profile (App) / Account (Web)

- View the active Google account
- Quick stats overview (web)
- The logout option is available on both platforms

18. Troubleshooting & FAQs

18.1 Common Issues

Login Issues
Q: I can't log in to the mobile or web application.
A: Please ensure you are connected to the internet and have granted the necessary permissions to your Google account for authentication. Try signing out and logging back in.

Image-to-Address Autofill Not Working
Q: I uploaded an image, but the address didn't autofill.
A: In rare cases, the image metadata may be missing or unsupported. Manually enter the address in the designated field.

Leads Not Appearing on the Map
Q: I've entered leads, but they don't show up on the map.

A: Ensure each lead entry includes a valid address and location data. Leads without geolocation cannot be displayed on the map.

Data Import Errors
Q: I'm getting errors when importing leads via CSV or Google Sheets.
A: Double-check that your file follows the required formatting structure (column headers, address fields, etc.). Refer to the import template in the Resources section.

Statistics Not Updating
Q: My dashboard statistics are not reflecting the latest updates.
A: Refresh the page or re-open the application. If the issue persists, verify your internet connection and ensure your changes were saved.

18.2 Troubleshooting Steps

Please note that steps may vary based on the device or platform being used. Always refer to your device's documentation and the latest version of the app for best results.

General Troubleshooting (Web & Mobile)

- **Check Internet Connection:** Ensure your device is connected to a strong and stable network (Wi-Fi or cellular data).
- **Restart the Application:** Fully close the app/browser tab and reopen it.
- **Update the App:** Ensure you are using the latest version. Visit the App Store or Google Play Store to update.
- **Restart Your Device:** Power cycle your device to clear cached errors or system hiccups.
- **Reinstall the App (Mobile only):** Uninstall and reinstall the app if problems persist.
- **Contact Support:** If none of the steps above resolve your issue, proceed to Section 19 for developer contact information.

19. Contact & Support

For technical support, feedback, or to report bugs, please contact any member of the development team:

Lena Ray - lenray@ucdavis.edu
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We welcome your feedback and are committed to improving the CRM experience continuously.