Broker Dashboard: Competitive Feature Specification

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0) Access & Onboarding (foundation)

Must-Have

- Role-gated access: Only users with `primary_broker` / `agent` in an active, paid firm see Broker dashboard.

- Seat management: Primary Broker sees seats used vs purchased; can invite/suspend agents.

- Per-agent permissions: Toggle features (Listings, Offers, Docs, CRM, Analytics, Export, Calendar) and scope (Firm-wide vs Assigned-only).

Workflows (MGX)

- On Stripe “active” → set Firm.status=active; set user.role=primary_broker; unlock broker tabs.

- Invite Agent → email w/ accept link → create `profile` w/ `agent` role; enforce seat cap.

Accept when

- Unpaid = read-only + “Upgrade” CTA.

- Seat cap blocks 26th invite on 25-tier.

1) Listings & Inventory

Must-Have

- Listings table (filter: status/type/county/agent).

- Create/Edit listing (public vs broker-only fields).

- Media manager: photos/floorplans/docs with visibility controls.

- Bulk actions: status change, assign agent.

Should-Have

- Public/Private projections preview (what customers will see).

- MLS/IDX import (scheduled job) + manual add.

Workflows

- Save listing → refresh search index → log audit event.

Accept when

- Public view hides private fields 100% of the time.

2) Offers & Transactions (deal flow)

Must-Have

- Offers Inbox: New / Countered / Accepted / Declined filters; sort by date/price.
- Offer detail: terms, buyer docs (POF/KYC), timeline, internal notes.
- Actions: Accept, Counter, Decline, Request Docs (creates follow-up task).

Should-Have

- Transaction workspace: escrow, inspection, appraisal dates; progress bar.
- Required-docs checklist per deal; completion %.

Differentiators

- Offer templates (Cash / Conventional / AS-IS).
- “What-if” counter helper (suggests terms based on ROI/CMA).

Workflows

- On Accept → create tasks: “Prepare Contracts”, “Earnest Money”.
- On Counter → notify investor; lock prior terms.

Accept when

- Every status change appears instantly in timeline; tasks auto-create.

3) Documents & E-Signature

Must-Have

- Document library per Deal/Listing (type, visibility, uploader, version).
- DocuSign (or equivalent) send & track (envelope status visible).

Should-Have

- Required doc templates by transaction type (Residential/Commercial).

Workflows

- Missing required doc → compliance warning on deal.

Accept when

- Broker can send, see status, and download fully executed packets.

4) CRM (Salesforce-style)

Must-Have

- Leads/Contacts with stages (New → Qualified → Shown → Offer → Under Contract → Closed/Lost).
- Kanban pipeline with drag-drop between stages.

- Owner/assignee, tags, source, last contact.

Should-Have

- Quick log of calls/emails/meetings; reminders.

Differentiators

- Auto-routing rules (e.g., new investor in Broward → assign to Agent A).
- Duplicate detection & merge.

Accept when

- Pipeline metrics (per agent, per stage) match the card counts.

5) Calendar, Tasks & Scheduling

Must-Have

- Firm calendar (Month/Week/Day).
- Event fields: title, description, start/end, location, color, assignees (multi).
- Task board (New/In Progress/Done) linked to Deals/Leads.

Should-Have

- ICS export; email reminders.

Workflows

- Offer → Accept → auto create closing/inspection deadlines.

Accept when

- Assigned agents see their events; colors consistent; reminders fire.

6) Analytics & Market Intelligence

Must-Have

- Firm KPIs: new leads, offers, acceptance rate, time-to-accept, listings by status.
- Market KPIs (by county): median price, inventory, DOM, sales volume.

Should-Have

- Agent scorecards; conversion by stage; source ROI.

Differentiators

- Scenario tool: “If price reduced 2.5%, expected DOM change?”

Accept when

- Filters by date range & county; exports CSV.

7) CMA & Valuation

Must-Have

- CMA wizard: set subject, comp rules (radius/recency/±beds/baths), include/exclude comps, generate PDF.

- Save & share CMA; store with the listing or contact.

Should-Have

- Auto-suggest comps; weight tuning.

Differentiators

- Side-by-side CMA + ROI view to justify counter offers.

Accept when

- CMA PDF has comps, adjustments, and final estimate; stored & retrievable.

8) ROI / Investment Tools

Must-Have

- Inputs: price, down %, interest, term, taxes/insurance/HOA, rehab, rent, vacancy, capex, mgmt.

- Outputs: Cap Rate, Cash-on-Cash, DSCR, Break-even Rent.

- Target ROI mode: enter goal → required rent & pass/fail badge on listing.

Should-Have

- Save scenarios; share with investor.

Accept when

- ROI badge appears in search for listings meeting investor goals.

9) Compliance & Audit

Must-Have

- Compliance score per transaction (required docs, deadlines met).

- Immutable audit log: who/what/when/before-after.

Should-Have

- Compliance export per deal for broker records.

Accept when

- Missing doc or late date reduces score; logs show every change.

10) Permissions & Security

Must-Have

- Per-agent feature toggles (view/edit listings, respond to offers, CRM, docs, analytics, export).

- Data scope: Assigned-only vs Firm-wide.

- MFA for broker/admin.

Accept when

- An agent without “Respond to Offers” cannot accept/counter (UI + backend).

11) Billing & Plan Management

Must-Have

- Pricing tab (public): tiers (25/50/100/Custom) with Stripe Checkout.

- Broker Billing page: plan, seats used, upgrade/downgrade, Stripe Portal link.

- Seat enforcement on invites.

Accept when

- Stripe active → unlock; past_due → restrict; seat cap enforced.

12) Notifications & Communications

Must-Have

- Email templates: Offer Submitted/Countered/Accepted/Declined, Docs Requested, Lead Assigned, Event Reminder.

- In-app toasts; optional SMS for critical steps.

Should-Have

- In-app chat on a listing (logs to Activities).

Accept when

- Correct template & variables are sent on each trigger.

13) Data In/Out & Admin

Must-Have

- Imports: CSV for listings/leads (mapping tool).

- Exports: CSV for listings, offers, leads, analytics.

- Admin tools: impersonate agent (support), error logs, health checks.

Accept when

- A legacy firm can import a CSV and be operational same day.

14) Branding & White-Label (nice to have)

- Custom logo/colors; branded CMA/ROI PDFs; custom subdomain.

15) Performance & QA Targets

- Search/filters: sub-second perceived updates; <1.5s TTFB initial.
- Mobile-ready broker pages.
- Uptime/error monitoring (Sentry/Logs).

How MGX Should Implement (using Supabase)

Entities (Supabase)

- firms, profiles, invites
- listings, listing_media
- offers, offer_timeline, documents, tasks
- leads, activities, calendar_events, calendar_event_assignees
- cma_requests, cma_comps, roi_models
- subscriptions, investor_verifications

Key Workflows (no code in MGX)

- Stripe webhook → update subscriptions & firms → unlock access.
- Invite Agent → create invites row; enforce seats_purchased.
- Offer actions (Accept/Counter/Decline/Request Docs) → update offers, append offer_timeline, create tasks, send email.

Permissions

- Use profiles.permissions JSON for UI gating; enforce with Supabase RLS server-side.

Integrations

- DocuSign (send envelopes & track status).
- Map (Mapbox; polygon search later).
- Census/FEMA (demographics/climate).
- Email (SendGrid) and optional SMS (Twilio).

Competitive Differentiators to Aim For

- Investor-grade tools: ROI target badges in search; CMA+ROI side-by-side on listing.
- Speed: caching + search indexing so filters feel instant.
- Compliance clarity: live score + export pack for audits.
- Granular permissions: brokers love fine control over agent actions.
- Agent productivity: Kanban CRM + auto-tasks from offer stages + shared calendar.
- Onboarding speed: CSV importer + templates so a firm is live in a day.

Final Acceptance Test (end-to-end)

1) New broker buys plan → becomes Primary Broker → invites 3 agents → assigns permissions.

2) Investor verifies → submits offer → broker counters → investor accepts → tasks & docs flow start.

3) Listing edited with private fields → public view hides them; Similar Properties show.

4) CRM moves lead across stages; calendar event assigned; reminder sent.

5) CMA generated and saved; ROI shows target met; analytics reflect activity.

6) Exports & audit logs available; compliance score accurate.