**📘 MyBroker Cloud: Business Overview for Automation (Playwright Ready)**

**🔐 Authentication & Roles**

* Login/Logout
* Role-based dashboards (Admin, Agent, Broker, Assistant)
* Role permissions can be managed (CRUD on roles, view settings)
* MFA or email-based verification not explicitly mentioned

**📊 Dashboards**

* **Customizable per role**:
  + Admin: Property stats, buyer/seller intake, revenue, charts
  + Agent: Pipeline, commissions, personal performance
  + Broker: Team performance, revenue by region
  + Assistant: Tasks, calendar, property management
* Dynamic charts: Pie, bar, line charts
* Supports rearrangement, filtering, card toggling, color themes

**🏠 Properties Module**

* Full CRUD of property records
* Attach agents to properties
* Property Logs: Track changes to every field with metadata
* Dirty field tracking for efficient updates
* Admin tools: property-specific documents, tasks, notes

**🧾 Purchase Proposals**

* Create/view/update offers
* Validation required for fields (e.g., price, buyer, seller)
* Proposal filtering, mass actions, notifications
* Dashboard widgets display proposals by state

**📝 Buyer/Seller Intake**

* Editable intake forms with mandatory fields (name, email, trust, etc.)
* Tabbed forms for Buyer 1 / Buyer 2
* Multi-referral and lender information handling
* Can be created from dashboard or profile page

**📁 Drive & Document Management**

* Upload, update, delete documents by section
* Each file contains metadata (creator, timestamps, section)
* Admin Drive module: CRUD operations on file cards
* Works with feature-specific drives (Seller Sheet, Buyer Sheet, Purchase Proposal)

**🧮 Commission Management**

* Dynamic commission allocation for listing/buying/both sides
* CDA template system for escrow
* Commission disbursement tracking with SISU integration
* Involves paperless pipeline compatibility
* Integrated with QuickBooks (via API) for invoices (Create, Send, Delete)

**📆 Calendar & Events**

* Event-driven calendar
* Supports leave requests (date range input)
* Displays tasks, meetings, showing schedules
* Assignments visible to assistants, agents, or team-wide

**📨 Notifications & Messaging**

* Notification Configuration UI (TO DO)
* Internal message boards:
  + Agent Board
  + Seller Board
  + Office-specific channels (Tucson, Phoenix)
* Real-time alerts for document upload, offer submission, etc.

**📑 Templates & Settings**

* Templates include:
  + Task templates
  + Email templates
  + Form field templates
* Dynamic form builder
* Admin can control visibility, field types, placeholders, etc.

**📌 Task Management**

* Create, assign, and track tasks per user/property
* Checklists and status fields included
* Admin task templates standardize workflows
* Feature: “Apply to All” location/task functionality

**📚 Reports**

* **Static & Dynamic Reports**:
  + Staff performance
  + Purchase proposal summaries
  + Transaction logs
* Date-range filtering available
* Exportable reports planned

**🔧 Settings Module**

* System-wide configurations:
  + Contact info
  + Role settings
  + Default statuses
* ABAC permissions per action/module
* Auto-synced modules like commissions, documents, table settings

**🧾 Logging & Audit Trails**

* Full system logging:
  + Property logs (with old/new value)
  + User actions
  + Visibility control by role/location
* Used for admin auditing, debugging, and compliance

**🤖 Automation Ideas with Playwright (JS)**

You can automate and validate workflows such as:

* Login flow and dashboard validation by role
* Property creation and verifying UI-field logs
* Commission calculation process simulation
* Purchase proposal creation and validation
* File upload to Drive with assertion on metadata
* Form submissions with all mandatory fields
* Reports filtering and export validations
* Task creation and status change