

Modules

1. Lead & Contact Management

- Capture (webforms, ads, WhatsApp, manual import)
- Profiles & enrichment (custom fields, scoring, deduplication)
- Pipeline & stage-management (Kanban, auto-progression rules)
- Activity timeline (calls, emails, chats, notes)

2. Property & Listing Management

- Property records (address, specs, pricing, status)
- Media & documents (photos, floorplans, virtual tours)
- Search & match engine (advanced filters, auto-match)

3. Deal & Transaction Tracking

- Deal/opportunity records (lead ↔ property linkage)
- Milestones & workflows (offer, inspection, legal, closure)
- Commission & invoicing (rules, generation, PDF exports)

4. Tasks, Calendar & Reminders

- Task creation & assignment (calls, visits, docs)
- Recurring tasks & due-date alerts
- Calendar sync (Google/Outlook) & visual scheduling

5. Communications Hub

- Email (templates, merges, tracking)
- WhatsApp & SMS (templated & dynamic messages)
- VoIP/click-to-call (recording, transcription)
- Live chat widget (bot + human handoff)

6. Dashboard & Reporting

- Prebuilt dashboards (funnels, source performance, agent KPIs)
- Custom report builder & scheduled exports
- Forecasting & health scores (pipeline revenue, churn risk)

7. AI & Automation

- Workflow builder (visual “if → then” rules)
- GPT-powered drafting (emails, follow-ups, recommendations)
- Predictive matching & lead scoring

8. User, Team & Access Control

- Roles & permissions (admin, manager, agent, read-only)
- Multi-office/tenant support (data partitioning)
- Audit trail & activity logs

9. Settings & Configuration

- Custom fields, pipelines & labels
- Notification preferences (channels, thresholds)
- Branding & white-label options (theme, domain)

10. Integrations & APIs

- Portals (99acres, Magicbricks, Zillow, etc.)
- Ad platforms & marketing tools (Facebook, Google, Mailchimp)
- Accounting (QuickBooks/Xero), e-sign (DocuSign)
- Public API & webhooks for extensibility

11. Mobile & Offline Access

- Responsive PWA for agents on-the-go
- Offline caching & push notifications
- (Optional) Native iOS/Android apps

12. Platform & Ops

- Scalability (sharding, partitioning)

- Performance (caching, search indexing)
 - Security & compliance (2FA, encryption, GDPR/CCPA)
 - Monitoring & reliability (SLA, backups, disaster recovery)
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