



CROP

COMMERCIAL REAL ESTATE OPERATING PLATFORM

CLIENT SYSTEM GUIDE · RELEASE V2.0.69

Every page. One connected system.

A visual map of what each button opens, how project context follows the user, where governed information lives, and how broker work becomes a clear client experience.

6 PRIMARY WORKSPACES

51 MAPPED ROUTES

5 PROJECT TYPES

6 CLIENT PORTAL VIEWS

Client system guide

Prepared for a clear, page-by-page walkthrough of the complete CROP platform.

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A clear tour of the complete platform.

Each chapter shows the page flow, the information it receives, the controls it depends on, and where its outputs go next.

01 Operating model Identity, project context, governed evidence, peer workspaces, and controlled outputs.	02 Home Personal triage, active-project selection, next action, and feedback loops.
03 Projects Five workstreams from classification through readiness, decisions, diligence, and execution.	04 CROPCRM + Origination Clients, contacts, opportunities, tasks, files, integrations, and source-backed deal flow.
05 Documents Upload, OCR and extraction, broker review, cited questions, exports, and publication gates.	06 Portfolio Preview and map imports, properties, dates, verified map pins, analytics, and outputs.
07 More + Administration Automation, connections, activity, support, prototype tools, access, APIs, and governance.	08 Client Portal Published decisions, scoped portfolio records, reviewed documents, messages, and return loops.
09 End-to-end workflows Five concise handoffs from source input through reviewed and traceable outcomes.	10 51-route appendix A compact production-page directory with purpose, path, and role visibility.

RECEIVES

Information entering the workspace.

DEPENDS ON

Authorization, review, readiness, or configuration gates.

SENDS

Records, decisions, evidence, or actions available to the next workspace.

How the system fits together

Users choose a project once. That context follows them through the workflow, limits what data they can see, and keeps every action tied to the correct client record.

1

Active project context follows broker navigation.

5

Required classifications route the correct workflow.

9

Governed lifecycle stages for tenant representation.

Reviewed

Document answers stay inside authorized reviewed sources.

01 · CHOOSE THE CONTEXT

Project first

The selector establishes which deal, records, documents, scenarios, dates, and exports are in scope.

02 · DO THE WORK

One governed record

Research, decisions, documents, and edits retain their source, review state, owner, and audit evidence.

03 · SHARE SAFELY

Publish, do not expose

The Client Portal receives published options and recommendations, project-scoped portfolio records, reviewed client documents, and scoped messages.

DEPENDENCY MAP

Context joins the system; it is not a fixed sequence

The top row supplies scope. The center carries that scope across peer workspaces. Only eligible records cross the client boundary.

ACCESS INPUT

Identity + role

Sets tenant, permissions, and client or observer boundaries.

RELATIONSHIP INPUT

CROPCRM client

Connects accounts, contacts, pursuits, files, and linked projects.

EVIDENCE INPUT

Reviewed sources

Supplies authorized document content, facts, and citations.



SHARED OPERATING SCOPE

Active project context

One selected assignment determines which records, documents, models, dates, exports, and suggested questions are in scope.



TRIAGE

Home

Priorities and next action.

TRANSACTION

Projects

Lifecycle and decisions.

RELATE

CROPCRM

Clients and pursuits.

EVIDENCE

Documents

Review and citations.

OPERATE

Portfolio

Assets, dates, analytics.

SUPPORT

More

Automation and governance.



CONTROLLED OUTPUT

Client Portal

Published shortlist and recommendation, project-scoped portfolio, reviewed documents, and messages.

DELIVERY OUTPUT

Exports + document room

Project-scoped deliverables return to governed storage and activity.

RETURN LOOP

Activity + audit

Decisions, uploads, edits, checks, and review states return as traceable events.

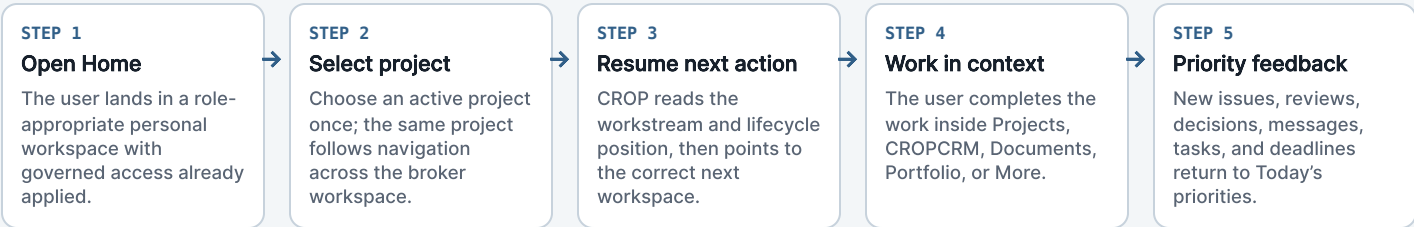
Ask Labarna is the governed read layer across authenticated routes. It explains whether it is reading the current page, active project, exact CRM record, or selected reviewed document. Project scope can search authorized reviewed project documents; Labarna never writes operational records.

Home

The personal command center. It answers “where should I start?” with the active project, the next lifecycle action, urgent work, and direct links into every operating workspace.

PAGE FLOW

From sign-in to the next best action



WORKSPACE CONNECTIONS

What Home receives and where it sends the user

Arrows show the direction of information and work.

RECEIVES FROM

Active project + workstream

Classification, lifecycle stage, readiness, owner, and recommended next route.

Operating queues

Tasks, issues, dates, messages, reviews, decisions, and recent activity.

DEPENDS ON

HOME

Authorized project context + lifecycle routing

SENDS TO

Correct next workspace

Projects, CROPCRM, Documents, Portfolio, or More with project context intact.

Explicit new records

Project, Issue, Critical Date, Client, or Task—only when the user creates one.

Why it matters: Home is the triage layer; it summarizes work but leaves each governed record in its owning workspace.

- 1

Ask Labarna

Answers from the current page and selected project's governed records and authorized reviewed files.
- 2

Pick up where you left off

Routes directly to the active project's next lifecycle workspace.
- 3

Today's priorities

Surfaces decisions, issues, reviews, messages, tasks, and deadlines that need attention.
- 4

Workspaces

Direct entry to Projects, CROPCRM, Documents, Critical Dates, and Portfolio.

Buttons and destinations

Route changes are shown at right

Continue review NEXT STAGE Opens Requirements, Documents, Market/Options, Origination, Scenarios, Terms / LOI, Diligence, Incentives, Execution, or Portfolio according to project type, stage, and readiness.	Open project /dashboard#mandates Opens the selected project in the command view; choose its name or View details to open the drawer.	Review why CROP placed it here /intake#deal-detective Shows the source-backed evidence behind lifecycle placement.
Open full work queue /crm?view=tasks Moves into CROPCRM Tasks for owner, priority, due date, and status work.	Search workspace OVERLAY Finds relevant pages and records; project-aware when a project is active.	+ New record DRAWER Creates a Project, Issue, Critical Date, Client, or Task without leaving the page.

Projects

The deal workspace. A required classification selects the correct lifecycle, financial model, readiness gates, and next actions for the assignment.

PAGE FLOW

How a project becomes an executed decision

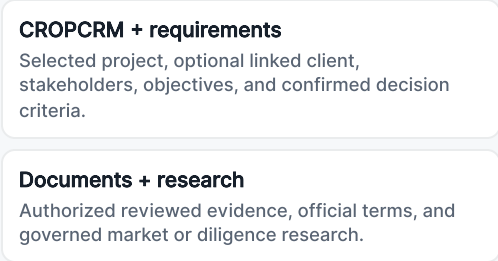


WORKSPACE CONNECTIONS

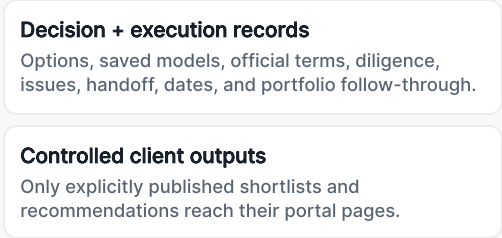
What a Project depends on and what it creates

Classification controls lifecycle and financial-model routing.

RECEIVES FROM



SENDS TO



Why it matters: Projects moves one assignment from intake to an evidence-backed decision without mixing workstreams or clients.

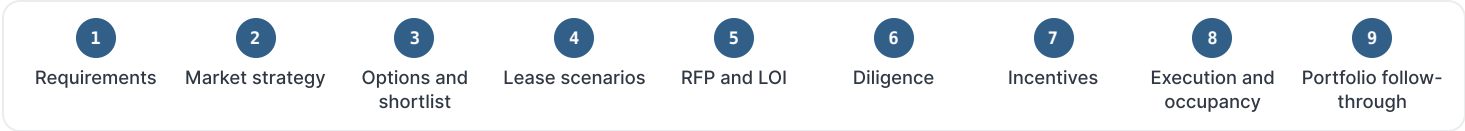
5x

One platform, five workstreams

Tenant Representation · Listing Agency Sale · Listing Agency Lease · Sale Leaseback · Investment Sale. Reclassification requires a reason and retains an audit record.

Tenant Representation lifecycle

The Overview page shows this nine-stage ribbon



Every project page has one clear job.

The route cards show what each page receives, what it creates, and how the active project remains intact.

01 Overview

Receives a created or selected project and optional client link. Classification sets lifecycle/model routing; Continue depends on readiness, and only a Super Admin can override blockers.

/dashboard

02 Requirements

Receives client notes or a reviewed complete source. Confirmed requirements and Detective evidence feed market/origination work, scenarios, and stage gates.

/intake

03 Options

Receives confirmed tenant requirements and governed research. Reviewed/locked shortlist records feed Scenarios and, when published, Portal Options.

/market

04 Scenarios

Receives workstream type plus project assumptions, options, or terms. Saved results remain reopenable; only a published recommendation feeds Portal Decision.

/scenarios

05 Terms / LOI

Receives proposals and reviewed extracted terms. Official records feed Compare, Diligence, Handoff, and exports; extraction alone is not official.

/transactions

06 Diligence

Receives type-specific routing, official terms, reviewed sources, and authorized research. Accepted findings and issues feed readiness and Handoff.

/diligence

07 Execution

Receives confirmed terms, reviewed sources, diligence, and dates. It creates packages, obligations, milestones, and links to Dates/Portfolio; nothing publishes automatically.

/handoff

+ More tools

Compare reads proposals/LOIs; Incentives reads requirements/research; Capital reads project/market inputs; Scoring reads options/weights; Issues collects findings across the lifecycle.

PROJECT MORE

Continue through the right path for this assignment.

Classification-specific lifecycles and user controls stay anchored to the same governed project.

Classification-specific paths

Open each workstream

Tenant Representation

Requirements /intake → Market strategy /market → Options and shortlist /market → Lease scenarios /scenarios → RFP and LOI /transactions → Diligence /diligence → Incentives /incentives → Execution and occupancy /handoff → Portfolio follow-through /portfolio.

Occupancy comparisons Shortlist publication Client decision

Listing Agency — Sale

Property intake /intake → Valuation and positioning /documents → Marketing and buyer pipeline /origination → Pricing and net proceeds /scenarios → Offers and purchase agreement /transactions → Buyer diligence /diligence → Closing /handoff.

Seller net proceeds model Buyer pipeline

Listing Agency — Lease

Property intake /intake → Positioning and pricing /documents → Marketing and prospect pipeline /origination → Landlord lease economics /scenarios → Proposals and lease negotiation /transactions → Lease diligence /diligence → Lease execution /handoff.

Landlord cash-flow model Prospect pipeline

Sale Leaseback

Requirements and objectives /intake → Valuation and capital strategy /documents → Investor marketing and bids /origination → Purchase and lease economics /scenarios → Purchase and lease terms /transactions → Diligence /diligence → Closing /handoff.

Investment Sale

Underwriting /intake → Offering materials /documents → Buyer targeting and bids /origination → Valuation and returns /scenarios → Purchase agreement /transactions → Buyer diligence /diligence → Closing /handoff.

Investment-sale underwriting Saved return schedules

Project buttons that move the user

Everything else opens a governed drawer or performs an in-place action

+ New project

DRAWER

Requires a name, classification, and optional description before the workspace is created.

Continue

TYPE + STAGE ROUTE

Uses the selected workstream and current readiness position to open the correct next page.

Preview client view

/portal/options or /portal/scenarios

Shows exactly what a client will see before publication.

Review supporting documents /documents

Preserves the active project while opening source evidence.

Edit critical dates

/dates

Opens the date board for the same project.

Invite client to portal

/admin?section=invites

Super Admin route for creating governed client access.

CROPCRM

The relationship operating system. It organizes accounts, contacts, pursuits, tasks, files, commercial visibility, and governed imports around a Client 360 record.

PAGE FLOW

How a relationship becomes active deal flow

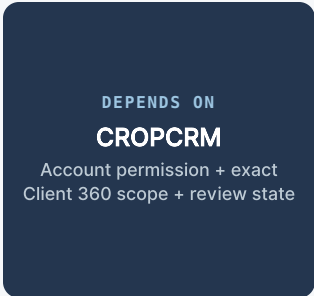
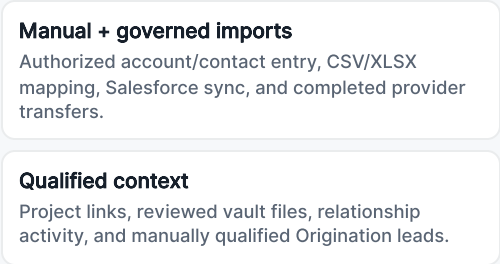


WORKSPACE CONNECTIONS

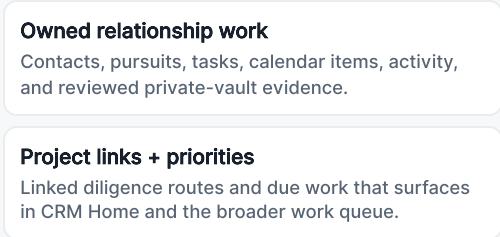
How relationship context becomes owned work

Client 360 narrows Labarna and actions to one exact account.

RECEIVES FROM



SENDS TO



Why it matters: CROPCRM turns relationship knowledge into permissioned, traceable work rather than disconnected contact notes.

360

One server page, multiple CRM views

The tabs update the URL with a view parameter. Opening a client adds the client ID and creates an exact record-scoped Ask Labarna experience.

Nine views, one exact relationship scope.

Every view reads or updates the same permissioned Client 360 context instead of creating a disconnected copy.

H Home

Receives authorized CRM records and saved dashboard preferences, then shows triage and recommended navigation without moving the underlying records.

?view=home

C Clients / Client 360

Receives manual/imported/provider data, project links, and reviewed vault files. Exact client scope governs contacts, tasks, pursuits, activity, files, and Labarna.

?view=clients

O Opportunities

Receives client context and manually qualified Origination leads. Owned stages, value, and next steps feed CRM Home; no feed row converts automatically.

?view=opportunities

T Tasks

Receives general, client, project, or pursuit work. Owner, priority, status, and due date feed Calendar and priority surfaces.

?view=tasks

F Files

Receives private client uploads and provider snapshots. Reviewed authorized files feed record-scoped answers; unreviewed extraction stays excluded.

?view=files

P Contacts

Receives an exact account and authorized enrichment, then feeds Client 360 and Origination relationship context.

?view=contacts

D Calendar

Receives due-dated Tasks. Completing or editing calendar work writes back to the owning Task record.

?view=calendar

\$ Commercial

Receives client and opportunity aggregates for read-only visibility and client navigation; it does not change billing or license records.

?view=commercial

u Import & sync

Receives completed connector runs, Salesforce metadata, or CSV/XLSX. Preview, mapping, setup verification, provenance, and rollback govern committed account/contact records.

?view=sync

Turn relationship context into owned follow-through.

Client 360 actions and Origination continue the same exact relationship scope.

Client 360 actions

Record-scoped work stays tied to one relationship

+ Client / Task / Opportunity

DRAWERS

Create core relationship records without leaving CROPCRM.

Open client

?view=clients&client=...

Opens the Client 360 drawer, record-specific Labarna, timeline, contacts, projects, pursuits, files, and commercial snapshot.

Open vault

?view=files

Moves directly to the selected client's private file workspace.

Open project diligence

/diligence?mandate=...

Connects the client relationship to the active deal's diligence work.

Import or sync data

?view=sync

Opens provider vault import, Salesforce migration, or CSV/XLSX preview and mapping.

Open deal-flow pipeline

/crm?view=opportunities

Opens CRM Opportunities. The user creates or advances the qualified pursuit; normalized Origination deals do not silently create CRM records.

Origination

CROPCRM's second top-level tab

PB Origination · Trigger Intelligence

Receives a verified PitchBook session, valid saved-results URL, feed cadence, and project link. It produces a normalized deal sheet, source-backed relationship workbench outputs, and project-scoped PDF/XLSX/DOCX/PPTX exports; the user opens CRM Opportunities for manual pursuit creation.

/origination

PB

PitchBook status and action dependencies

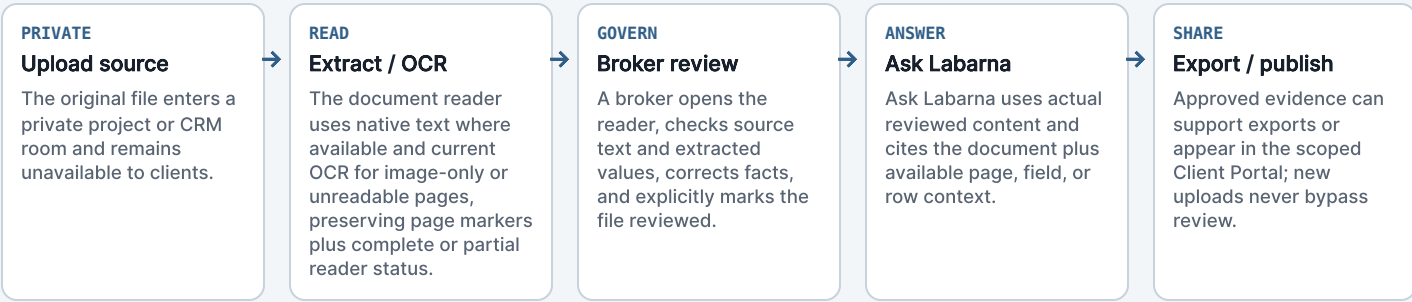
Super Admin manages the session in Admin APIs. Established and Established · expiring remain usable; Needs verification and Not linked do not. Pull now requires a verified or verified-expiring session and a saved feed. Cadence can be every 12 hours, 24 hours, 7 days, or manual. "Configured" is not the same as "Verified."

Documents

The governed document room. Files enter privately, pass through extraction and broker review, then become approved evidence for project decisions, Ask Labarna, exports, and the Client Portal.

PAGE FLOW

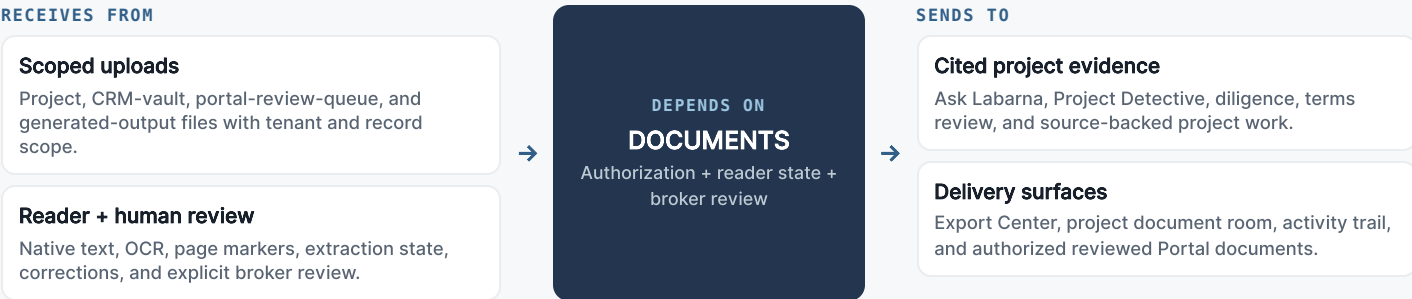
How a document becomes trusted evidence



WORKSPACE CONNECTIONS

How Documents becomes the evidence layer

Extraction is evidence; review determines governed downstream use.



Why it matters: Documents keeps source text, review state, citations, and access together so extracted text never silently becomes an operational fact.

AI

What Ask Labarna answers from

On this page, the user selects a reviewed document. Labarna reads its actual reviewed source text and extraction evidence, cites the document plus available page/field/row context, distinguishes reviewer-confirmed facts from pending extraction, and says when the source does not contain the answer.

01

Document room

Project selector, reviewed-document Ask scope, upload, generated outputs, source review, reader, correction, review state, filters, and reprocessing.

/documents

02

Export Center

Client deliverables and internal working exports in PDF, XLSX, DOCX, or PPTX; completed files return to the project room and activity trail.

/exports

03

Playbook

Searchable knowledge capture, expandable guidance, case studies, and Knowledge Playbook DOCX export.

/playbook

R

Reports

There is no separate Reports page. Reports and deliverables intentionally live in Export Center under Documents.

/exports

From reviewed evidence to a governed outcome.

These controls preserve the line between private source material, reviewed content, cited answers, project deliverables, and intentional client visibility.

Document buttons and outcomes

Review is the publication boundary

Upload a file

IN PLACE

Creates a private source file, runs the configured reader, and keeps it hidden from clients until review.

Select a reviewed document

ASK SCOPE

Changes Ask Labarna from project-wide context to the exact selected source.

Open review / Open reviewed file

READER

Opens the PDF/document reader, extraction fields, source context, and review controls.

Correct value · Review and save

IN PLACE

Records a reviewer-corrected fact with audit evidence; it does not silently write a lease or portfolio record.

Mark reviewed / Reopen review

STATE CHANGE

Controls availability to governed downstream client and answering surfaces.

Reprocess file

IN PLACE

Reruns a failed or partial reader only after the user's document authorization is checked.

Download source

ORIGINAL FILE

Returns the authorized original from the document store.

Room index / report / briefing

PDF · XLSX · DOCX · PPTX

Generates governed room-level deliverables.

Generate client deliverable

/exports

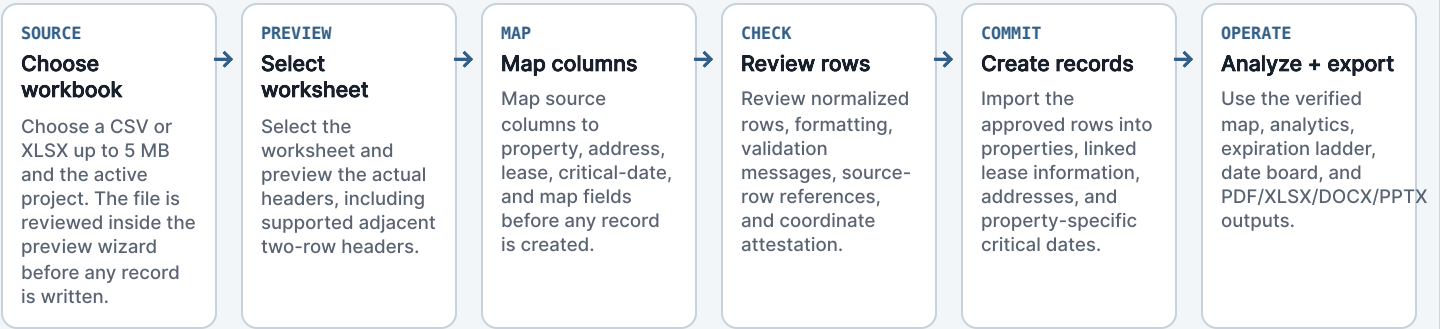
Builds an LOI, Executive Summary, RFP, Lease Abstract export, or Market Survey from an eligible scoped record. A Lease Abstract is an on-demand deliverable from reviewed source evidence—not an ingestion workflow and never a silent write into lease or portfolio records.

Portfolio

Turns asset schedules reviewed inside the import wizard into property records, lease dates, verified map locations, concentration analysis, expiration visibility, and project-specific portfolio strategy.

PAGE FLOW

How a workbook becomes portfolio intelligence

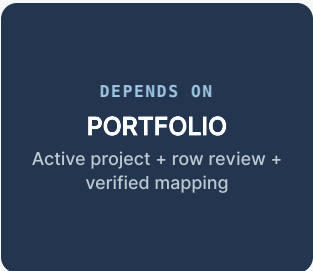
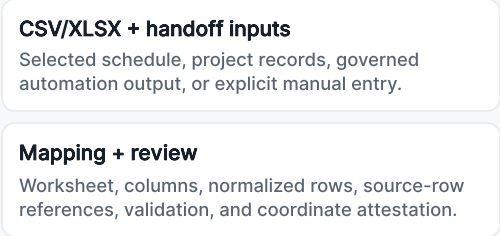


WORKSPACE CONNECTIONS

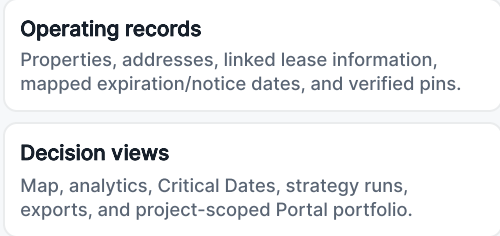
How source schedules become operating records

The preview is the control point; there is no blind import.

RECEIVES FROM



SENDS TO



Why it matters: Portfolio converts reviewed rows into reversible, property-specific records while preserving where every value came from.

01 Portfolio Strategy

Preview and import CSV/XLSX schedules, create/edit properties, view the interactive map, regional concentration, facility mix, expiration ladder, market benchmark, and export the portfolio.

/portfolio

02 Critical Dates

Receives mapped lease expiration/notice dates, handoff dates, and manual dates. Owner, timing, severity, property/project link, and evidence feed Action this week, Days 8–30, Home, and Execution.

/dates

Commit reviewed rows, then operate with confidence.

Import, rollback, map, strategy, and export controls remain property-specific and traceable to the reviewed schedule.

Portfolio buttons and outcomes

Imported rows remain reviewable and reversible

Import portfolio locations

3-STEP WIZARD

File → Map → Review. Accepts CSV/XLSX up to 5 MB, supports worksheet selection and adjacent two-row headers, and preserves source-row references.

Import reviewed rows

COMMIT

Creates normalized properties, linked lease information, and property-specific critical dates.

Roll back this import

REVERSIBLE

Reverses only that import transaction without deleting unrelated portfolio data.

+ Portfolio property / Edit

DRAWER

Maintains the operating record and explicit manual-entry evidence.

Reset · Fit · Open property

MAP

Filters and navigates verified pins; addresses remain visible when coordinates are not verified.

Build a portfolio strategy

GUIDED ANALYSIS

Requires an active project, at least one governed portfolio property, and the configured Automation Service; results remain source-backed.

Portfolio exports

PDF · XLSX · DOCX · PPTX

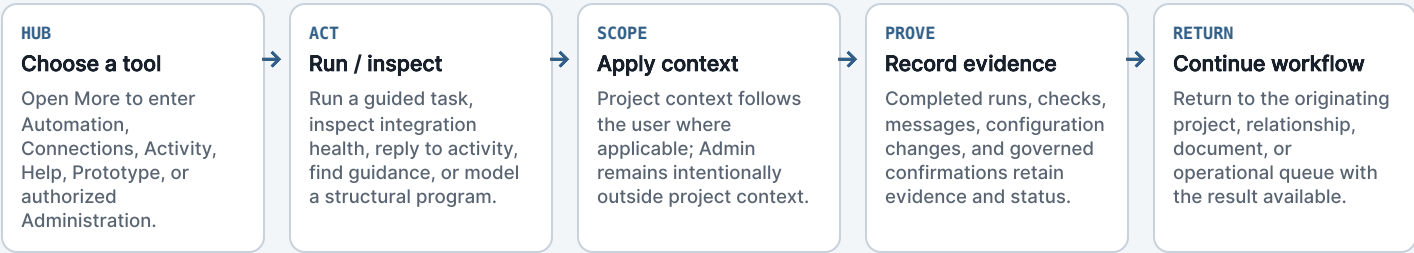
Creates summary, model, report, and briefing deliverables with consistent currency and SF formatting.

More

Specialist tools that support every workspace: automation, connections, messages and activity, guidance, structural analysis, and administration.

PAGE FLOW

How specialist tools support the work

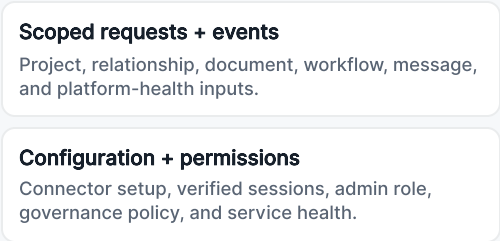


WORKSPACE CONNECTIONS

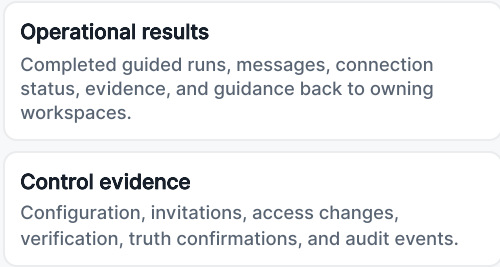
How platform services support operating work

Admin is deliberately outside active-project context.

RECEIVES FROM



SENDS TO



Why it matters: More supports, connects, and governs CROP without becoming a second place to maintain the underlying business record.

- 01 Automation**
Run guided business tasks, specialist agent work, governed analysis, and review completed results.

/data
- 02 Connections**
All brokers see business status and purpose. Super Admin can run checks, inspect evidence, and open setup. User labels: Available / Installed / Needs attention / Not available; Admin labels: Verified / Configured / Needs attention / Setup required.

/connected
- 03 Messages & Activity**
Reply to project messages, upload a secure project file, and review the activity ledger.

/activity
- 04 Help Center**
Search the intake-to-decision guide and glossary; open the recommended next workspace.

/help
- 05 Structural X-Ray Studio**
Upload plans, extract a reviewed program, model structure, assess feasibility and timeline, and export PNG.

/prototype
- 06 Admin**
Full command center for Super Admin; Admin users who navigate directly receive People-only administration.

/admin

The control plane behind every workspace.

People, sessions, invitations, integrations, system health, and truth governance are managed here without inheriting or obscuring the active project context.

Admin command center

Super Admin sections

Overview

</admin>

Operational action queue for invitations, sign-ins, role changes, integrations, truth exceptions, and failed runs.

People

<?section=people>

Roster, roles, CRM permissions, project/document scope, password/MFA actions, revoke and restore.

Sessions

<?section=sessions>

Live session register, account coverage, refresh, and immutable authentication events.

Invites

<?section=invites>

Send, resend, and revoke scoped invitations.

Emails

<?section=emails>

Brand settings, templates, live preview, save, and controlled test delivery.

Audit

<?section=audit>

Filter evidence by actor, surface, event, target, and date; open evidence or export CSV.

APIs

<?section=apis>

Controls connector availability across workspaces: configure sessions, fields, schedules, exports, verification, and Run now. Configured does not mean Verified.

System

<?section=system>

Database and runtime health, degraded service links, latency/error summaries, and private search records.

Governance

<?section=governance>

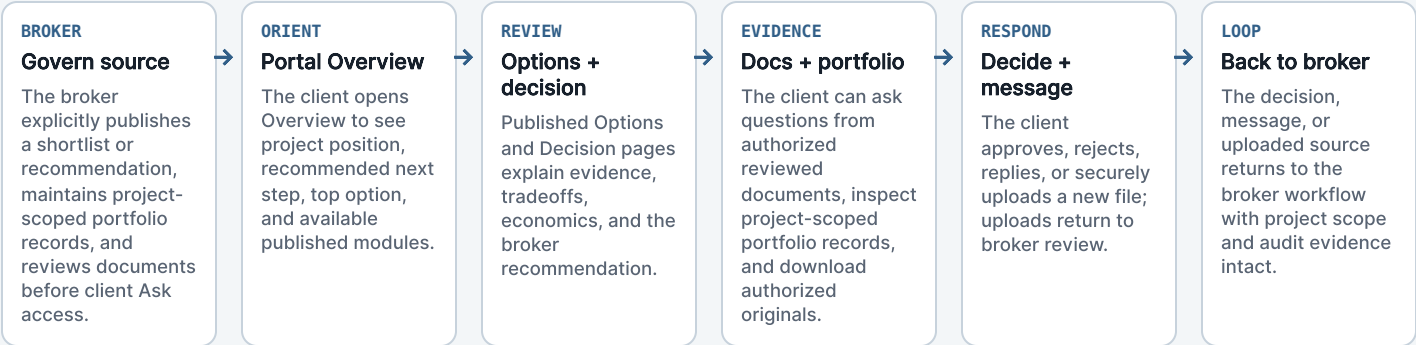
Feeds truth state and source boundaries across every workspace through confirmation, provenance rules, and locked licensing controls.

Client Portal

A simplified project view for decisions and collaboration. Brokers can preview it. Clients see published decision work, project-scoped portfolio records, reviewed client documents, and messages; observers see only explicitly designated documents.

PAGE FLOW

How governed broker work reaches the client



WORKSPACE CONNECTIONS

What crosses the client boundary—and what returns

Visibility is controlled by membership, scope, publish state, and review state.

RECEIVES FROM

Broker-controlled work

Published shortlist and recommendation, project-scoped portfolio records, reviewed documents, and project messages.

Access rules

Portal membership, selected project, available modules, and designated observer document scope.

DEPENDS ON

CLIENT PORTAL

Membership + scope + publish/review gates

SENDS BACK

Decisions + messages

Recommendation approval/rejection and secure replies return to the broker workflow.

New source files

Uploads enter the private broker review queue; they are neither approved nor published automatically.

Why it matters: The Portal enables client decisions and collaboration without exposing internal drafts, unrelated records, or unreviewed Ask content.

- 01 Overview**

Where things stand, project stage, top option, recommended path, metrics, and approve/proceed action.

/portal
- 02 Options**

Broker-locked shortlist, search and status filters, fit, address, SF, source, gaps, and tradeoffs.

/portal/options
- 03 Decision / Scenarios**

Published economics, recommendation details, approve recommendation, or reject and return to broker.

/portal/scenarios
- 04 Portfolio**

Depends on project-scoped portfolio records; when records exist, clients see the map, analytics, governed property list, and XLSX download.

/portal/portfolio
- 05 Documents**

Ask searches only authorized reviewed documents. Client downloads use reviewed project scope; observer downloads stay limited to explicitly designated document IDs.

/portal/documents
- 06 Messages**

Secure project thread, reply, and file drop. New files return to broker review rather than publishing immediately.

/portal/messages

Simple actions, protected by precise scope.

The client can decide, download, reply, or upload without seeing internal drafts or bypassing the broker review and publication boundaries.

RB **Role-based navigation**

Options and Decision appear when their broker-published records exist; Portfolio appears when project-scoped portfolio records exist. Documents and Messages remain stable client tabs. An observer is routed to designated Documents only and cannot browse the broader client project; Ask still requires reviewed content.

Client actions

Every action stays inside the active project

Approve and proceed

CONFIRMATION

Records the client decision against the published recommendation.

Reject and return to broker

IN PLACE

Returns the scenario for broker follow-up with a governed decision state.

Download original

AUTHORIZED FILE

Client access uses reviewed project documents. Observer access remains limited to exact documents explicitly designated by an administrator.

Send reply

PROJECT THREAD

Adds a message to the secure client ↔ broker conversation.

Upload to project

BROKER REVIEW QUEUE

Queues extraction and review; it does not approve or publish the file.

Back to broker workspace

/home?mandate=...

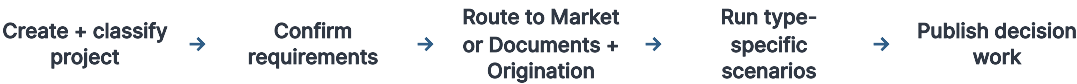
Visible in broker preview only.

What happens across pages

These are the handoffs that make CROP one operating platform instead of disconnected tools.

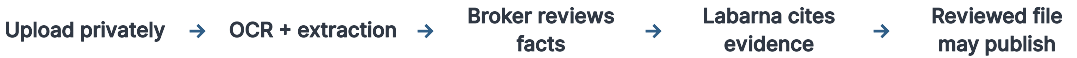
Project to decision

Confirmed inputs become market work, analysis, a recommendation, and a client decision.



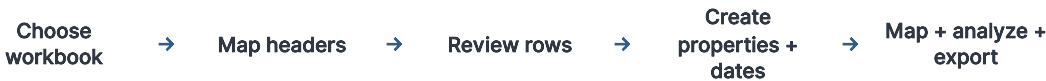
Document to answer

Source content stays governed from upload through answer and publication.



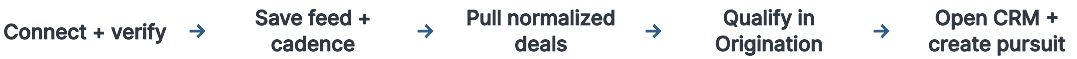
Workbook to portfolio

No blind import: the user sees worksheet, mapping, normalized rows, and final effects.



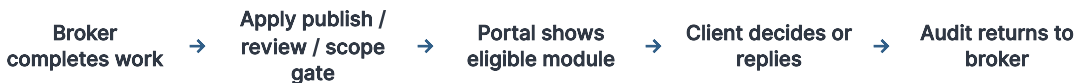
PitchBook to pursuit

A verified session and saved result feed become normalized, project-linked deal intelligence.



Broker work to client view

Published decision records, project-scoped portfolio records, reviewed client documents, and scoped messages cross their specific portal gates.



Internal QA-only pages are intentionally excluded. Use the filters to show the surface relevant to each audience.

Every production page

| WORKSPACE / PAGE | ROUTE | WHAT IT DOES | WHO SEES IT |
|--------------------------------|-------------------------|---|-------------|
| Home | /home | Resume the next project action, review priorities, and open a workspace. | Broker |
| Projects · Overview | /dashboard | Create, classify, select, continue, archive/restore, and inspect projects. | Broker |
| Projects · Requirements | /intake | Intake analysis, Project Detective, fact review, requirement confirmation, and exports. | Broker |
| Projects · Options | /market | Market/property research, scoring, shortlist, publication, and client preview. | Broker |
| Projects · Scenarios | /scenarios | Type-specific financial models, saved results, recommendation, publication, and decision history. | Broker |
| Projects · Terms / LOI | /transactions | RFP, proposal, LOI, normalized terms, review, versions, risks, and negotiation exports. | Broker |
| Projects · Diligence | /diligence | Routed diligence workstreams, owners, findings, research, costs, and evidence. | Broker |
| Projects · Execution | /handoff | Handoff package, obligations, milestones, landlord deliverables, and linked dates/docs. | Broker |
| Projects · Compare | /compare | Side-by-side proposal and LOI economics with comparison exports. | Broker |
| Projects · Incentives | /incentives | Programs, criteria, filings, compliance milestones, contacts, research, and exports. | Broker |
| Projects · Capital Markets | /capital | Information packets, cap-rate references, and capital-markets deliverables. | Broker |
| Projects · Scoring | /scoring | Weighted ranking, controlled weight editing, review, and scoring exports. | Broker |
| Projects · Issues | /issues | Issue queue, severity/status filtering, full decision record, create, and edit. | Broker |
| CROPCRM · Home | /crm?view=home | Authorized CRM records and dashboard preferences become personal triage and recommended navigation. | Broker |
| CROPCRM · Clients / Client 360 | /crm?view=clients | Exact account scope connects contacts, pursuits, tasks, activity, files, projects, commercial context, and record-scoped Labarna. | Broker |
| CROPCRM · Opportunities | /crm?view=opportunities | Manually owned pursuits move through Qualification to Won/Lost; Origination rows never convert automatically. | Broker |
| CROPCRM · Tasks | /crm?view=tasks | Client/project/pursuit work becomes owner-, priority-, status-, and due-date-controlled action. | Broker |
| CROPCRM · Files | /crm?view=files | Private vault uploads, review, original download, provider snapshots, and file-register export. | Broker |
| CROPCRM · Contacts | /crm?view=contacts | Account-scoped contacts and authorized enrichment feed Client 360 and relationship context. | Broker |
| CROPCRM · Calendar | /crm?view=calendar | Due-dated Tasks appear on the calendar; edits write back to the owning Task. | Broker |
| CROPCRM · Commercial | /crm?view=commercial | Read-only client/opportunity reporting with client navigation; no billing or license mutation. | Broker |
| CROPCRM · Import & sync | /crm?view=sync | Provider, Salesforce, CSV, or XLSX inputs pass through verification, preview/mapping, provenance, commit, and rollback controls. | Broker |
| Origination | /origination | PitchBook feeds, normalized deals, trigger intelligence, relationship workbench, and CRM handoff. | Broker |
| Documents · Document room | /documents | Upload, OCR/extraction, review, reader, Ask Labarna, reprocess, download, and room outputs. | Broker |
| Documents · Export Center | /exports | Client deliverables and internal reports in PDF, XLSX, DOCX, and PPTX. | Broker |
| Documents · Playbook | /playbook | Searchable knowledge capture, guidance, case studies, and DOCX export. | Broker |

| WORKSPACE / PAGE | ROUTE | WHAT IT DOES | WHO SEES IT |
|--------------------------------|---------------------------|--|------------------------------------|
| Portfolio | /portfolio | Reviewed imports, properties, maps, analytics, lease expirations, and exports. | Broker |
| Portfolio · Critical Dates | /dates | Owned date boards for this week, days 8–30, and the longer horizon. | Broker |
| More · Automation | /data | Guided business tasks, specialist agents, governed results, and admin data counts. | Broker |
| More · Connections | /connected | All brokers see business status; Super Admin can run checks, inspect evidence, and open exact setup. | Broker Super Admin |
| More · Messages & Activity | /activity | Broker message replies, secure file upload, and recent platform actions. | Broker |
| More · Help Center | /help | Searchable workflow guide, glossary, and recommended workspace links. | Broker |
| More · Structural X-Ray Studio | /prototype | Plan extraction, structure/program review, feasibility, timeline, and PNG output. | Broker |
| Admin · Overview | /admin | Operational action queue across access, integrations, truth, and failed runs. | Super Admin |
| Admin · People | /admin?section=people | Roster, roles, permissions, scopes, password/MFA, revoke, and restore. | Super Admin Admin |
| Admin · Sessions | /admin?section=sessions | Live session coverage, register, and immutable authentication stream. | Super Admin |
| Admin · Invites | /admin?section=invites | Send, resend, and revoke scoped access invitations. | Super Admin |
| Admin · Emails | /admin?section=emails | Email branding, templates, live preview, save, and controlled testing. | Super Admin |
| Admin · Audit | /admin?section=audit | Evidence explorer with actor/event/target/date filters and CSV export. | Super Admin |
| Admin · APIs | /admin?section=apis | Sessions, schedules, fields, checks, exports, and Run now for integrations. | Super Admin |
| Admin · System | /admin?section=system | Runtime/database health, degraded links, metrics, and private search records. | Super Admin |
| Admin · Governance | /admin?section=governance | Truth confirmation, provenance boundaries, explicit states, and locked licensing preview. | Super Admin |
| Client Portal · Overview | /portal | Project position, top option, recommendation, metrics, and approve/proceed. | Client |
| Client Portal · Options | /portal/options | Published shortlist, filters, fit, evidence, gaps, and tradeoffs. | Client |
| Client Portal · Decision | /portal/scenarios | Published scenarios and recommendation approval/rejection. | Client |
| Client Portal · Portfolio | /portal/portfolio | Project-scoped portfolio records drive the map, analytics, list, and XLSX download. | Client |
| Client Portal · Documents | /portal/documents | Ask reads reviewed authorized content; client access is project-scoped and observer access is exact-document designated. | Client Observer |
| Client Portal · Messages | /portal/messages | Secure project thread, reply, and file drop into broker review. | Client |
| Profile & security | /profile | Profile, reset email, MFA, session sign-out, and role-appropriate return route. | Super Admin Broker Client Observer |
| Secure access | /login | Sign in, MFA, first-access, recovery, and activation link. | All invited users |
| Account activation | /activate | Activate an invitation and establish first access. | Invited users |

ASK LABARNA

Answers from the right scope.

Available across authenticated broker, Admin, and client pages unless the user hides it in display preferences. The bar explains whether it is reading the current page, active project, exact CRM record, or selected reviewed document and offers page-specific suggested questions. Project questions can use authorized reviewed project documents; unsupported or absent answers are stated plainly.

DOCUMENT CITATION

PAGE / FIELD / ROW

REVIEW STATE

TRUTHFUL NOT FOUND

READ ONLY

GOVERNED ACCESS

Publication is intentional.

Tenant isolation and record scope are checked before content is loaded. Ask uses reviewed document content; client documents use project review gates, while observer browsing stays limited to exact designated document IDs. Extraction never silently becomes a lease or portfolio fact.

LIVE + VERIFIED

AWAITING SOURCE

CONFLICTED

MANUAL ENTRY

MODELED ASSUMPTION