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.

RELEASE V2.0.69
AUGUST 2026

INSIDE THIS GUIDE

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.

RECEIVES
Information entering the workspace.

DEPENDS ON
Authorization, review, readiness, or configuration gates.

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

THE OPERATING MODEL

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 workstream.

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.

TRANSACT
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.

PRIMARY RAIL · START HERE

`/home`

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

STEP 1
Open Home
The user lands in a role-appropriate personal workspace with governed access already applied.

→

STEP 2
Select project
Choose an active project once; the same project follows navigation across the broker workspace.

→

STEP 3
Resume next action
CROP reads the workstream and lifecycle position, then points to the correct next workspace.

→

STEP 4
Work in context
The user completes the work inside Projects, CROPCRM, Documents, Portfolio, or More.

→

STEP 5
Priority feedback
New issues, reviews, decisions, messages, tasks, and deadlines return to Today’s priorities.

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

Button	Destination	Description
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.

PRIMARY RAIL · TRANSACTION WORK

Projects

`/dashboard?mandate=…`

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

START
Create + classify
Create the project and select one of five required classifications; this establishes the correct workstream.

→

INPUT
Requirements
Capture and confirm source-backed objectives, decision criteria, stakeholders, and Project Detective evidence.

→

DISCOVER
Market / pipeline
Tenant work routes through Market and Options. Seller, landlord, sale-leaseback, and investment-sale marketing routes through Documents and Origination before Scenarios.

→

DECIDE
Scenarios
Run the project-type financial model, review complete saved results, and publish a governed recommendation.

→

VERIFY
Terms + diligence
Track proposals, LOIs or purchase terms, then route source-backed diligence findings and issues.

→

FINISH
Execute + publish
Build the execution package, obligations, milestones, deliverables, portfolio follow-through, and approved client view.

WORKSPACE CONNECTIONS

What a Project depends on and what it creates

Classification controls lifecycle and financial-model routing.

RECEIVES FROM

CROPCRM + requirements
Selected project, optional linked client, stakeholders, objectives, and confirmed decision criteria.

Documents + research
Authorized reviewed evidence, official terms, and governed market or diligence research.

→

DEPENDS ON
PROJECTS
Role/scope + classification + readiness gates

→

SENDS TO

Decision + execution records
Options, saved models, official terms, diligence, issues, handoff, dates, and portfolio follow-through.

Controlled client outputs
Only explicitly published shortlists and recommendations reach their portal pages.

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

5×

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

1. Requirements
2. Market strategy
3. Options and shortlist
4. Lease scenarios
5. RFP and LOI
6. Diligence
7. Incentives
8. Execution and occupancy
9. Portfolio follow-through

PROJECTS · PAGE ROUTES

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

PROJECTS · WORKSTREAMS AND CONTROLS

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

Button	Route	Description
+ 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.

PRIMARY RAIL · RELATIONSHIPS

/crm?view=…

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

START
CRM Home
CRM Home presents the user's chosen dashboard, recommended next action, and pinned or recent relationships.

→

ACCOUNT
Client 360
Open Client 360 to work from one exact account, including record-scoped Ask Labarna.

→

CONTEXT
Contacts + files
Add contacts, relationship activity, project links, and reviewed private-vault source files.

→

PIPELINE
Opportunity
Create or advance a pursuit from Qualification through Won or Lost with value, owner, and next step.

→

ACTION
Tasks + calendar
Assign tasks, due dates, priority, calendar timing, and follow-up activity to keep the relationship moving.

→

GROW
Origination loop
Origination normalizes project-linked targets and provides Open deal-flow pipeline. The user then creates or advances the qualified pursuit; feed rows never create CRM opportunities automatically.

WORKSPACE CONNECTIONS

How relationship context becomes owned work

Client 360 narrows Labarna and actions to one exact account.

RECEIVES FROM

Manual + governed imports
Authorized account/contact entry, CSV/XLSX mapping, Salesforce sync, and completed provider transfers.

Qualified context
Project links, reviewed vault files, relationship activity, and manually qualified Origination leads.

→

DEPENDS ON
CROPCRM
Account permission + exact Client 360 scope + review state

→

SENDS TO

Owned relationship work
Contacts, pursuits, tasks, calendar items, activity, and reviewed private-vault evidence.

Project links + priorities
Linked diligence routes and due work that surfaces in CRM Home and the broader work queue.

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.

CROPCRM · PAGE VIEWS

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`

↻

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`

CROPCRM · OPERATIONS AND GROWTH

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.”

PRIMARY RAIL · SOURCE EVIDENCE

`/documents?mandate=…`

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

PRIVATE
Upload source
The original file enters a private project or CRM room and remains unavailable to clients.

→

READ
Extract / OCR
The document reader uses native text where available and current OCR for image-only or unreadable pages, preserving page markers plus complete or partial reader status.

→

GOVERN
Broker review
A broker opens the reader, checks source text and extracted values, corrects facts, and explicitly marks the file reviewed.

→

ANSWER
Ask Labarna
Ask Labarna uses actual reviewed content and cites the document plus available page, field, or row context.

→

SHARE
Export / publish
Approved evidence can support exports or appear in the scoped Client Portal; new uploads never bypass review.

WORKSPACE CONNECTIONS

How Documents becomes the evidence layer

Extraction is evidence; review determines governed downstream use.

RECEIVES FROM

Scoped uploads
Project, CRM-vault, portal-review-queue, and generated-output files with tenant and record scope.

Reader + human review
Native text, OCR, page markers, extraction state, corrections, and explicit broker review.

→

DEPENDS ON
DOCUMENTS
Authorization + reader state + broker review

→

SENDS TO

Cited project evidence
Ask Labarna, Project Detective, diligence, terms review, and source-backed project work.

Delivery surfaces
Export Center, project document room, activity trail, and authorized reviewed Portal documents.

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`

DOCUMENTS · CONTROLS AND DELIVERY

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?mandate=…`

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

SOURCE
Choose workbook
Choose a CSV or XLSX up to 5 MB and the active project. The file is reviewed inside the preview wizard before any record is written.

→

PREVIEW
Select worksheet
Select the worksheet and preview the actual headers, including supported adjacent two-row headers.

→

MAP
Map columns
Map source columns to property, address, lease, critical-date, and map fields before any record is created.

→

CHECK
Review rows
Review normalized rows, formatting, validation messages, source-row references, and coordinate attestation.

→

COMMIT
Create records
Import the approved rows into properties, linked lease information, addresses, and property-specific critical dates.

→

OPERATE
Analyze + export
Use the verified map, analytics, expiration ladder, date board, and PDF/XLSX/DOCX/PPTX outputs.

WORKSPACE CONNECTIONS

How source schedules become operating records

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

RECEIVES FROM

CSV/XLSX + handoff inputs
Selected schedule, project records, governed automation output, or explicit manual entry.

Mapping + review
Worksheet, columns, normalized rows, source-row references, validation, and coordinate attestation.

→

DEPENDS ON
PORTFOLIO
Active project + row review + verified mapping

→

SENDS TO

Operating records
Properties, addresses, linked lease information, mapped expiration/notice dates, and verified pins.

Decision views
Map, analytics, Critical Dates, strategy runs, exports, and project-scoped Portal portfolio.

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`

PORTFOLIO · CONTROLS AND OUTCOMES

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.

PRIMARY RAIL · PLATFORM OPERATIONS

`/data`

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

HUB
Choose a tool
Open More to enter Automation, Connections, Activity, Help, Prototype, or authorized Administration.

→

ACT
Run / inspect
Run a guided task, inspect integration health, reply to activity, find guidance, or model a structural program.

→

SCOPE
Apply context
Project context follows the user where applicable; Admin remains intentionally outside project context.

→

PROVE
Record evidence
Completed runs, checks, messages, configuration changes, and governed confirmations retain evidence and status.

→

RETURN
Continue workflow
Return to the originating project, relationship, document, or operational queue with the result available.

WORKSPACE CONNECTIONS

How platform services support operating work

Admin is deliberately outside active-project context.

RECEIVES FROM

Scoped requests + events
Project, relationship, document, workflow, message, and platform-health inputs.

Configuration + permissions
Connector setup, verified sessions, admin role, governance policy, and service health.

→

DEPENDS ON
MORE
Role + connector health + governed task inputs

→

SENDS TO

Operational results
Completed guided runs, messages, connection status, evidence, and guidance back to owning workspaces.

Control evidence
Configuration, invitations, access changes, verification, truth confirmations, and audit events.

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`

MORE · ADMINISTRATION

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-FACING SURFACE · GOVERNED SCOPE

`/portal?mandate=…`

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

BROKER
Govern source
The broker explicitly publishes a shortlist or recommendation, maintains project-scoped portfolio records, and reviews documents before client Ask access.

→

ORIENT
Portal Overview
The client opens Overview to see project position, recommended next step, top option, and available published modules.

→

REVIEW
Options + decision
Published Options and Decision pages explain evidence, tradeoffs, economics, and the broker recommendation.

→

EVIDENCE
Docs + portfolio
The client can ask questions from authorized reviewed documents, inspect project-scoped portfolio records, and download authorized originals.

→

RESPOND
Decide + message
The client approves, rejects, replies, or securely uploads a new file; uploads return to broker review.

→

LOOP
Back to broker
The decision, message, or uploaded source returns to the broker workflow with project scope and audit evidence intact.

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`

CLIENT PORTAL · DECISIONS AND COLLABORATION

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.

END-TO-END FLOWS

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.

Create + classify project → Confirm requirements → Route to Market or Documents + Origination → Run type-specific scenarios → Publish decision work

Document to answer

Source content stays governed from upload through answer and publication.

Upload privately → OCR + extraction → Broker reviews facts → Labarna cites evidence → Reviewed file may publish

Workbook to portfolio

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

Choose workbook → Map headers → Review rows → Create properties + dates → Map + analyze + export

PitchBook to pursuit

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

Connect + verify → Save feed + cadence → Pull normalized deals → Qualify in Origination → Open CRM + create pursuit

Broker work to client view

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

Broker completes work → Apply publish / review / scope gate → Portal shows eligible module → Client decides or replies → Audit returns to broker

COMPLETE ROUTE DIRECTORY

Every production page

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

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