Problem: Commercial real estate brokers process ~300k transactions for nearly $1T annually and rely entirely on excel, emails and phone calls to orchestrate complex transactions.

- All transactions are unique and buyer/sellers/brokers/title agents never have the full picture of what's going on.

Solution: A collaborative platform to enable brokers, buyers, sellers, and title companies to transparently and seamlessly manage transactions.

- Short term: deliver platform to brokers (at a price) who can give free, simplified versions to buyers/sellers/lawyers/title companies
- Long term: Create a partner product that streamlines the process of title origination and closing for Title companies.
    - Marketplace of vendors to assist in closing
        - Appraisals
        - Surveys
        - Environmental testing
        - etc

Value Props:

- Transparency. Stay up to date with real time closing progress for multimillion dollar transactions
- Attract more business: Value add/sales tool for brokers trying to win business from buyers/sellers: “we have a more transparent process:
- Time savings with efficient tooling, templates and automation allowing all parties
- Ease of use
- Document management with secure storage
- Close more deals with less work
- Manage all your deals in one place
- Centralize communication, document sharing, required tasks

Note: we still need to cut a decent amount from overall scope to get mvp. Richie, your input will be key here.
I’ve attached screenshots below certain sections to give you an idea of what we’re aiming to have it look like

Website Landing Page

Sign Up Page

- First
- Last
- Email
- Phone #
- Company
- Role (dropdown menu)
    - Broker
    - Seller
    - Seller Attorney
    - Buyer
    - Buyer Attorney
    - Escrow
    - 3rd Party
    - ☐ “I agree to DealTitan’s Cookie and Privacy Policy.”

Login Page

- Email
- Password
- ☐ Remember Me
- Forgot Password button
- Login button

Home Page

- Navigation Bar - Top Row
    - Company Logo upper left (takes you to Deal page when clicked)
        - Home
        - Assignments
        - Calendar
        - Search Bar
        - Notifications (Top Right)
        - User profile (Top Right) with drop down menu
            - Image (Add Image?)
            - Name
            - Role
            - Account Settings
                - Personal
                - Basic Information
                - Name
                - Email
                - Phone
                - Notifications

- Security
    - Change Password

Home Page

- List of all deals with
    - Picture
    - Deal Name
    - City, State
    - Sale price
    - Close date
    - What stage its at
    - Progress tracker % complete

- Filtering by deal name, address, sale price, close date, stages etc

- Squares vs List View
    - List View goes into vertical rows when sorted by specific filters (eg stages)
    - Rows of data that are filterable

- Create a new deal button
    - This button prompts questions
        - Deal Name
        - Select deal type (from deal templates or New deal)
            - If new, ability to save as template and name template
        - Add photo (skippable)
        - Form to add deal info
            - Summary (see below)
        - Form to add people/roles

Add New Deal button
- Popup
- Prompts you to
    - Name deal & type in key info
        - Address
        - Size
        - Property Type
        - Sale price
        - Status
        - Est. close date
        - Commission
            - buy/sell side

Deal Page

Several tabs on Deal page that users can switch between. All data/info is correlated to specific deal

- Deal overview (data)
    - Summary
        - Address
        - Photo
        - Agency (settlement/title)
        - Date opened/offer date
        - Est close date
        - Purchase price
        - Commission percentage
            - buy/sell
        - Assessor's Parcel Number(s) (if available)
        - Policy Liability Amounts (if available)
        - Borrowers
        -
        - Roles
        - Names
    -
- Progress Tracker (top of screen on main page).
    - To change stage, all tasks in that stage are completed
    - This should be editable based on the stages created in the tasks tab

Offer Tracking

- Creators of the deal are able to send links to potential buyers to submit offers.
- Should have a dashboard for Admin users (deal creators) to show all offers

Tasks

STAGES

- Each Stage has section with list of required tasks to be completed in stage before proceeding
    - Can assign due date & people to it (due dates will appear on calendar)
    - Attach relevant files
    - description

- Ability to edit stages (both adding/subtracting tasks or renaming them)
- Checklist for each stage (comes from template but editable on deal)

Activity Log / Tasks

- On main page, have a skinny bar on far right side of the page with 2 tabs.
    - 1. Activity log of whats been completed/uploaded so users can quickly see what's been done recently
    - 2. Tasks so users can quickly see what tasks they have to complete for this specific deal & what tasks other users have.

Tasks

- List of all the stages in this particular deal
- List of documents/tasks required for each stage
    - Ability to edit document types
- Checkmark that says completed & one to say Not relevant
    - Tracks who made any changes

- Can assign task to person to complete/ review a completed task(document upload / signature/ etc)
- Each task has a designation

  Starts as 'not started'
    - Can change to
    - Not applicable
    - In progress
    - Completed

People

- Roles
    - For now there will be 2 types of users
        - Admin users (those who pay for the account)
            - Admins should be able to
                - Create new deals
                - Send invites to regular users and then manage those users on a per deal (both are on a per deal basis). A regular user should only have access to a deal he was invited to.
                - Create custom permission sets for different teams for what they can and cannot see
                - Document folders
                - Offers dashboard
                - Tasks
                - Members
                -
            - Regular users

- Can create free accounts and have access to only what they are given access to by an Admin
- Can view documents & edit/add tasks if given the ability
- Should have a simplified version of the platform
    - No
        - Templates
        - User management
        - Create deal

- Names
- Emails
- Phone numbers
-

Documents

- For now, integrating with Box api seems like the fastest way to mvp.
- We will need to also access their permission settings and enable functioning UI via our app for documents/folders
    - It's okay if a user can see a document is present but should not be able to click into a document unless authorized
- Box also offers esign capabilities
- Later on we will want the ability to create new documents, either from scratch or from templates we provide or are created by the user.
- Audit log of who edited/touched doc
- Color code for completed, needs review, needs signature
- Request doc button for non admins
    - Send request to doc owner or deal owner to receive access to the document or folder
    -

-

Calendar

- Calendar that ties to dates for tasks/milestones for this specific deal
- For mvp, doesn't need to be editable directly on calendar

Settings

Templates

Templates allow users to preconfigure several aspects of the platform to make workflow more efficient.

Deal Templates

- Create, edit, delete custom deal formats.
- Includes required
    - Summary info
        - Incl commission breakdown
    - documents/folders
    - Roles
    - details on stages for progress bar
    - tasks for a particular deal type
        - E.g. hotel, mutltifamily class A, office building
- Can name templates and save/share them
- All aspects should be editable in a deal once a deal is created, but this allows users to not have to add all these details every time

Roles

- Create/edit list of potential roles in a deal
- When creating a template, you should be able to select roles from this group

Notifications

- Notifications page to manage
    - Type of notifications
    - Frequency
    - Emails
    - In future - SMS

Tasks

- Your tasks for the day/upcoming
- Maybe some type of color coding to indicate upcoming/overdue OR completed, in progress, not started
- Tasks on each deal you have access too (whether yours or not)

- Overdue items
- Recently completed tasks
- Upcoming items
- Sorts by
    - Deal
    - Due date

Calendar

- Overall calendar for this deal -
- Shows the critical dates from the deal page home
- Later we'd like to connect to google/microsoft calendar

USER Profile (top right)

- Name
- My Account (clickable)
- Sign out

My account

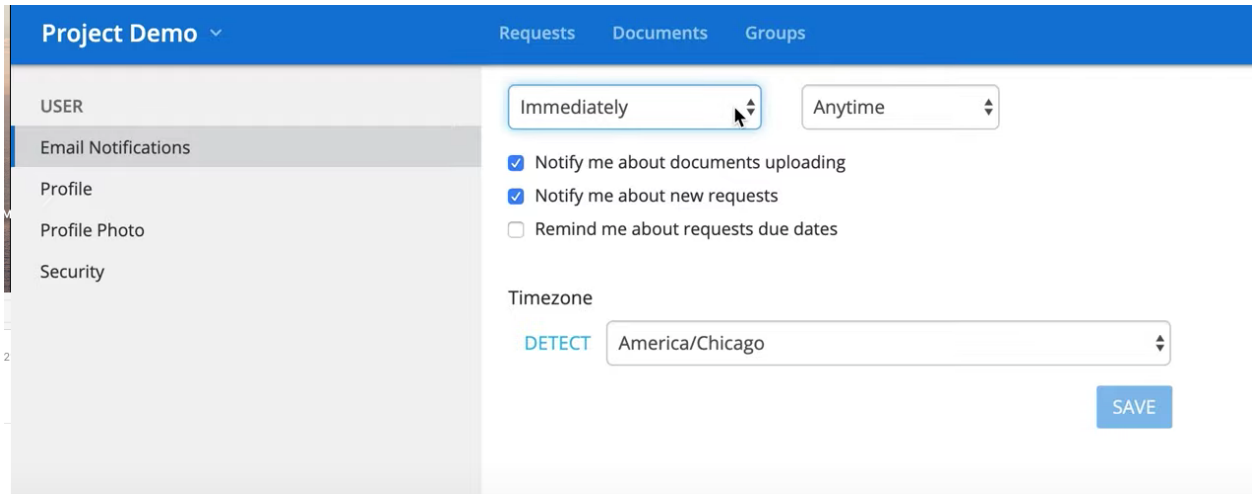
- First Name Last Name
- Email
- Phone
- Address
- Company
- Role
    - Broker
    - Buyer
    - Buyer Attorney
    - Escrow
    - Lender
    - Seller
    - Seller Attorney
    - Title
    - 3rd Party
- Upgrade Tab

Sign Up

- Needs to be extremely simple and fast
- First name, last name, email, phone

Login

- Reset password
- Help docs

Notifications

- Send notifications as tasks are assigned
- Send daily at X time
- Notify me about:
    - New deals I'm added to
    - document/task requests
    - Due dates
    -