

TeamClozr | Consistent Client & Listing Management

Give agents one repeatable place to capture buyer and seller information, listing details, property-specific notes, tasks, reminders, and handoffs - so important work is less likely to live only in notebooks, text threads, or memory.



CONSISTENCY ACROSS AGENTS

- Give buyers, sellers, and listings the same basic structure every time: contact information, property criteria, location, notes, and next actions.
- Capture details that are easy to lose between showings and transactions - access instructions, vacant-home concerns, mowing or maintenance, repairs, contractors, and work still to be performed.
- Track operational tasks such as title-company notification, inspections, follow-ups, property work, and other transaction milestones.
- Use reminders and task status to make outstanding work visible instead of relying on an agent to remember it.

WHY THAT MATTERS

- A common workflow makes expectations easier to teach, reinforce, and repeat across a brokerage.
- Better-organized working notes improve continuity when an agent, assistant, team lead, or other authorized team member needs context.
- Consistent task tracking helps reduce missed follow-ups, forgotten property obligations, and "I thought someone else handled it" gaps.

PORTABILITY & CONTINUITY

- **Single-client sharing:** import or export an individual client record app-to-app, by email, or by text message.
- **Full-list transfer:** export an entire client list to another TeamClozr app holder, email, text, or the user's own macOS TeamClozr application.
- Client and listing information can be moved intentionally when responsibility changes, supporting cleaner handoffs and less re-entry of information.
- Portability helps prevent important working information from becoming trapped on one device or inside one person's personal process.

BUILT FOR THE WAY AGENTS WORK

- Apple Watch companion app brings reminders and simple tasks to the agent without requiring the phone app to be open.
- macOS application coming: manage the same content from a laptop for easier desk-based review, updates, and organization.
- The result is a lightweight system agents can use in the field and at their desk - making a consistent process easier to adopt rather than harder.

SUPPORT & HELP
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[TeamClozr User Guide](#)

TeamClozr is an organizational and workflow tool. Brokerage policies, approved transaction systems, document-retention requirements, privacy rules, and applicable law remain controlling.