TeamClozr Local

Realtor Help Guide

Complete page, button, and entry-field guide for realtor handoff and support.
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This PDF is generated from the launch documentation in the TeamClozr repository and is ready to post as a website help guide.

This guide explains every current page, button, and entry area in TeamClozr Local for realtor handoff and support use. The app stores work locally on the iPhone. It does not require an account and does not sync to a cloud service in the current launch build.

Main Tabs

The bottom tab bar has four tabs:

- `Home`: daily dashboard and client list.
- `New`: create a seller or buyer client.
- `Tasks`: all tasks across all clients.
- `Settings`: branding, permissions, reminders, and local data tools.

Launch Dashboard Page

Purpose:

- Shows a branded overview before entering the main app.
- Uses the app name and brokerage name from Settings.
- Summarizes active clients, due-today work, storage mode, next action, workflow spotlight, and feature chips.

Buttons:

- `Enter the App`: opens the tabbed app on Home.
- `Create New Listing`: opens the New tab.

What to know:

- Storage mode shows `Local` because this version does not cloud sync.
- If there are no clients yet, the page encourages creating the first client.

Home Page

Purpose:

- Gives the realtor the current next action and the active client list.

Top bar:

- `Dashboard`: returns to the launch dashboard page.
- App name: displays the current App Name from Settings.
- `Edit`: turns on manual client reorder.

- `Done`: exits manual client reorder.
- `Dashboard actions` menu: round ellipsis icon.

Dashboard actions menu:

- `Import Client Archive`: opens the iOS file picker to import a TeamClozr/ListingFlow archive.
- `Create Client`: opens the New Client form.

Next Best Action:

- Shows the highest-priority pending dated task.
- Tap the card to open the related client.
- If nothing is pending, it shows `No pending actions`.

Clients section:

- Filter buttons:
  - `All`: active non-closed buyers and sellers.
  - `Buyers`: active non-closed buyer clients.
  - `Sellers`: active non-closed seller clients.
  - `Closed`: closed clients.
- Client row:
  - Tap the row to open Client Detail.
  - Row shows profile photo or initials, display name, company or address/search area, current workflow stage, progress count, progress bar, and status badge.
- Client actions menu:
  - `Edit`: opens Edit Client.
- Reorder mode:
  - Up arrow: moves the visible client up.
  - Down arrow: moves the visible client down.

New Client Page

Purpose:

- Creates a seller or buyer client.
- Saves meaningful input locally as you work.

Header:

- Back arrow / `Close`: returns to Home.
- `New Client`: page title.

- Question mark icon: decorative/help placeholder in the current UI.

Client Type:

- `Buyer`: switches the form to buyer search/preferences mode.
- `Seller`: switches the form to seller listing mode.

Contact Details:

- `First name`: client first name.
- `Last name`: client last name.
- `Company / LLC / Estate`: company, estate, trust, LLC, or other entity name.
- `Phone`: primary phone.
- `Email`: primary email.

Additional Contacts:

- Plus button: adds another contact, up to five.
- Trash button: removes that additional contact.
- Additional contact fields:
  - First name
  - Last name
  - Role / relationship
  - Phone
  - Email

Property Details, for sellers:

- `Type`: Land, Single Family, Condo, Apartment, Multi Family, Town Home.
- `Status`: Draft, Prelisting, Active, Under Contract, Under Contract With Option, Pending With Contingency, Temporarily Off Market, Closed.
- `Property address or lot description`: optional. Use for a street address, lot description, or placeholder description.
- `List price`: seller target or list price.
- `Showing Count`: number of showings.
- `Number of beds`
- `Number of baths`
- `Sq feet`
- `Short notes`: internal working notes.
- `Set estimated listing date`: turn on to choose an estimated listing date.

Buyer Preferences, for buyers:

- `Type`: desired property type.
- `Status`: buyer workflow status.
- `Preferred area or location`: required before creating a buyer.
- `Price range`: buyer budget.
- `Showing Count`: number of buyer showings.
- `Number of beds`
- `Number of baths`
- `Sq feet`
- `Short notes`: buyer preferences, timing, must-haves, or deal breakers.

Transaction Status:

- `Status`: same status picker used above.
- Informational note: reminds you that status and details can be updated later.

Transaction:

- `Set Option Period End`: toggles an option-period date.
- `Set Inspection Date`: toggles an inspection date.
- `Set Appraisal Date`: toggles an appraisal date.
- `Set Appraisal Due Date`: toggles an appraisal due date.
- `Set Closing Date`: toggles a closing date.
- `Lender`: lender name.
- `Title Company`: title company name.
- `Other Agent`: other agent name.

Vacant Property, sellers only:

- `Vacant Property`: shows or hides vacant-property detail fields.
- `Access notes`: lockbox, gate, showing, or entry details.
- `Upkeep expectations`: lawn, pool, cleaning, utilities, and similar expectations.
- `Owner out of town details`: travel or remote-owner context.

Media:

- `Add Media`: opens media only after the client has been created.
- If no saved client exists yet, the app shows `Create Client First`.

Create action:

- `Create Client`: saves the record locally and returns to Home.
- Buyers need a preferred area/location first.

- Sellers can be created without a street address.

Keyboard:

- `Done`: dismisses the keyboard and formats price/square-foot fields where applicable.

Client Detail Page

Purpose:

- Main workspace for one buyer or seller client.

Top bar:

- `Back`: returns to the previous page.
- `Edit client`: opens Edit Client.
- `Export client`: creates a single-client archive and opens the iOS share sheet.
- `Client actions` menu:
  - `Run AI`: creates/updates editable AI summary, generated tasks, and generated content.
  - `Delete Client`: asks for confirmation and deletes the client plus local media files.

Hero card:

- Shows profile image or initials.
- Shows display name, buyer/seller context, address/search area, status, property type, workflow progress, price/budget, beds, baths, and square footage.

Quick actions:

- `Add Task`: opens Add Task.
- `Add Media`: opens Add Media.
- `Add Note`: opens Quick Note.
- `Add Link`: opens Add Listing URL.

Secondary actions:

- `AI Summary`: runs AI processing.
- `Export`: exports this client.
- `Edit Client`: opens Edit Client.

Disclosure sections:

- Tap a section header to expand or collapse it.
- `Contact & Client`: client type, company, first/last name, phone, email, and additional contacts.
- `Property & Status`: property/search fields from intake.

- `Transaction`: dates, lender, title company, and other agent.
- `Vacant Property`: seller access/upkeep/owner travel details.
- `Tasks`: tasks for this client.
- `Workflow`: stage progress, target dates, and checklists.
- `Media`: attached media for this client.
- `Online Listings`: saved URLs.
- `Notes & AI Summary`: read-only notes and editable summary.

Additional contact actions:

- `Call`: opens the phone dialer.
- `Message`: opens Messages.
- `Email`: opens Mail.

Tasks section:

- Checkmark circle: completes a task.
- Task actions menu:
  - `Edit`
  - `Delete`
- `Add Task`: opens Add Task.
- `Open Content Generator`: opens editable listing description, social post, and email draft.

Workflow section:

- Tap a stage row to expand it.
- `Add Target Date`: assigns a target date for the stage.
- Date picker: changes the target date.
- `Clear Target Date`: removes the date.
- Checklist row: tap to complete or uncheck an item.
- Stage action:
  - `Complete <stage>` for active/pending stages.
  - `Reopen <stage>` for complete stages.

Media section:

- Tap a media row to open Media Detail.
- Media actions menu:
  - `Use as Profile Photo`, image media only.
  - `Clear Profile Photo`, shown for the current profile image.
  - `Delete`

- `Add Media`: opens Add Media.
- `Use Image as Profile`: sets the first image media as the profile image.

Online Listings section:

- Tap a link row to open the URL.
- Link actions menu:
  - `Edit`
  - `Delete`
- `Add Listing URL`: opens Add Listing URL.

Notes & AI Summary:

- Short notes are selectable and can be copied.
- Phone numbers detected in notes appear as phone chips.
- Phone chip actions:
  - `Call`
  - `Message`
  - `Copy Number`
- `AI Summary` text editor: edit generated or manual summary text.
- `Add Note`: appends a quick note to the main notes field.
- `Save Edited Summary`: saves changes to the AI Summary field.
- `Run AI`: processes the client again.

Edit Client Page

Purpose:

- Update an existing client. Most fields match New Client.

Header:

- `Close`: saves pending autosave changes and returns to detail.
- `Save`: saves immediately and closes.
- `Edit Client`: page title.

Sections:

- Client Type
- Contact Details
- Additional Contacts
- Property Details / Buyer Preferences

- Transaction
- Notes
- Vacant Property, sellers only

Primary action:

- `Save Client`: saves and closes.

Autosave:

- Changes autosave after a short delay.
- Closing flushes pending autosave.

Add/Edit Task Page

Purpose:

- Add or update a task for a client.

Header:

- `Close`: closes and flushes pending task autosave.
- `Save`: saves and closes.
- Title: `Add Task` or `Edit Task`.

Task section:

- `Title`: task name. Add mode can autosave as `Untitled Task` after meaningful detail entry.
- Client name: read-only context.
- `Description`: task detail.

Details section:

- `Category`: General, Client, Prep, Marketing, Showing, Offer, Closing.
- `Priority`: Low, Normal, High.
- `Workflow Stage`: None or a stage from the client workflow.

Due Date section:

- `Set due date`: shows or hides due date/time.
- `Due`: date and time picker.

Status section, edit mode only:

- `Status`: Pending, Completed, Skipped.

Keyboard:

- `Done`: dismisses keyboard.

Add Media Page

Purpose:

- Attach property/client media to a saved client.

Header:

- `Close`: closes the sheet.
- `Done`: saves text media if text exists, then closes.

Photos section:

- `Choose Photo`: opens photo library.
- `Open Camera`: opens camera photo capture when available and permitted.
- `Camera photo captured`: appears after a camera image is captured.

Attached to This Listing:

- Shows the number of media items already attached.
- Lists attached media rows.

Attach Note as Media:

- Text field prompt: `Attach a note, email, or text thread as media`.
- This saves as media, not as the client's main notes.

Audio and Video:

- `Attach Audio or Video`: opens chooser.
- Chooser buttons:
  - `Audio`
  - `Video`
  - `Cancel`

Alerts:

- `Create Listing First`: shown if media is opened without a saved client.
- `Media Unavailable`: shown if camera/video hardware or permission is unavailable.

Record Audio Page

Purpose:

- Record a local audio note.

Recorder section:

- Status text: `Ready to record`, `Recording`, or `Recording ready to save`.
- Timer: shown while recording.
- `Start Recording`: starts audio recording after microphone permission.
- `Stop Recording`: stops the recording.

Header:

- `Close`: stops without saving and closes.
- `Save`: attaches the recording and closes. Disabled until a recording exists.

Alert:

- `Microphone Unavailable`: shown when permission or recording setup fails.

Media Detail Page

Purpose:

- Preview a selected media item.

Behavior:

- Images show a preview when the file is available.
- Video shows a playable video view when the file is available.
- Audio shows a play/pause button when the file is available.
- Text media shows saved text.
- Missing files show a fallback message.

Button:

- `Close`: closes Media Detail.

Content Generator Page

Purpose:

- Edit generated marketing and communication text.

Header:

- `Close`: closes without forcing a save.
- `Save`: saves generated content and closes.

Fields:

- `Listing Description`: editable public listing description.
- `Social Post`: editable social copy.
- `Email Draft`: editable email copy.

Keyboard:

- `Done`: dismisses keyboard.

Add/Edit Listing URL Page

Purpose:

- Save public/private listing links for a client.

Header:

- `Close`: closes without saving.
- `Save`: asks for confirmation.

Platform section:

- Platform segmented picker:
  - Zillow
  - Realtor.com
  - MLS
  - Other

Link section:

- `Title`: display title. If blank, the app uses the platform name.
- `URL`: web address. `https://` is added if no scheme is entered.

Confirmation:

- `Confirm Add` or `Confirm Save`
- `Cancel`
- `Add` or `Save`

Quick Note Page

Purpose:

- Append a note to the client's main notes field.

Header:

- `Close`: closes without saving.
- `Save`: saves nonblank note text and closes.

Field:

- `Quick Note`: text editor.

Tasks Page

Purpose:

- Manage all tasks across all local clients.

Header:

- Shows Team Clozr branding.
- Search/filter icons in the header are decorative in the current UI.

Stats card:

- `Due Today`: count of pending tasks due today.
- `High`: count of open high-priority tasks.
- `Open`: count of pending tasks.

Board mode buttons:

- `Today`: Due Today, No Due Time, Completed Today.
- `Upcoming`: future pending dated tasks and No Due Time.
- `Overdue`: pending tasks before today.
- `Completed`: completed tasks.

Task rows:

- Completion circle: completes pending tasks.
- Task title.
- Client name.
- Client address/search area.
- Priority/category/stage pills.
- Due time or `No due time`.
- Task actions menu:
  - `Edit`
  - `Delete`

Delete confirmation:

- `Cancel`
- `Delete`

Settings Page

Purpose:

- Control local branding, permission visibility, reminder mode, and local data import/export.

Team Clozr Identity:

- `App Name`: changes the app name shown on launch/dashboard surfaces.
- `Brokerage Name`: changes brokerage/company label.
- `Accent Color`: color picker for buttons and highlights.
- `Background Color`: color picker for launch page background.

Permissions:

- `Camera`: readiness status.
- `Microphone`: readiness status.
- `Photos`: availability status.
- `Notifications`: local-device status.

Reminders:

- `Delivery`: locked to Local Device in the current launch build.
- Note: `Temporarily locked to Local Device.`

Local Data:

- `Export All Data`: exports all local clients, tasks, dates, media, and notes through the iOS share sheet. Disabled when no clients exist.
- `Import Data Archive`: opens the iOS file picker for single or full local archive import.

Footer:

- Shows `Developed by LeadTrue - Version <version> (Build <build>)`.

Archive Import And Export

Export a client:

1. Open Client Detail.

2. Tap `Export client` or `Export`.
3. Use the iOS share sheet to save or send the archive.

Export all data:

1. Open Settings.
2. Tap `Export All Data`.
3. Use the iOS share sheet to save or send the archive.

Import:

1. Open Home or Settings.
2. Tap `Import Client Archive` or `Import Data Archive`.
3. Pick a `.listingflow.zip` or compatible archive file.
4. Imported clients appear at the top of the local list.

Important:

- Export archives are the intended backup and transfer path.
- Deleting the app can remove local data unless an archive has been exported.