Agent Ledger Pro

Real Estate Management Platform

Complete Feature List — 225+ Features | 25 Categories
www.AgentLedgerPro.com

Your All-in-One Solution — One Subscription Replaces Multiple Expensive Tools

Customer Relationship Management (CRM) 16

- ✓ **Complete Customer Database** — manage leads, buyers, sellers, renters, investors & landlords
- ✓ **Contact Management** — primary, mobile, work & home phones with click-to-call
- ✓ **Spouse / Co-Buyer Tracking** — store partner contact details on each record
- ✓ **Lead Status & Priority Tracking** — new lead, active, under contract, closed & more
- ✓ **Client Type Classification** — buyer, seller, renter, investor, landlord categories
- ✓ **Lead Quality Scoring** — 10–100 point quality score for lead prioritization
- ✓ **Property Preferences** — budget range, bedrooms, bathrooms, sq ft, style & location
- ✓ **Financial Profile** — pre-approval status, lender info, down payment & financing type
- ✓ **Activity & Follow-Up Tracking** — last contact, next follow-up dates, methods & notes
- ✓ **Personal Details** — birthdays, anniversaries, hobbies & gift preferences
- ✓ **Customer Notes & History** — timestamped interaction log with search
- ✓ **Tags & Custom Fields** — organize and filter customers by custom criteria
- ✓ **Bulk Customer Upload** — import from CSV or Excel with field mapping
- ✓ **Customer Printout & PDF Export** — professional client summary with all details
- ✓ **QR Code Intake Forms** — shareable lead capture forms with automatic CRM import
- ✓ **Business & Commercial Contacts** — dedicated tracking for commercial clients & entities

☑ Follow-Up Checklists 6

- ✓ **Reusable Checklist Templates** — buyer, seller, new lead, closing & custom templates
- ✓ **Inline Template Assignment** — add checklists directly in the customer form
- ✓ **Interactive Checkbox Tracking** — check off items with real-time progress bars
- ✓ **Completion Date Stamps** — automatic date tracking for each completed item
- ✓ **Multiple Checklists Per Customer** — assign different templates per client need
- ✓ **Print & PDF Support** — checklists appear on customer printouts and exports

Deal & Commission Management 12

- ✓ **Deal Pipeline Dashboard** — visual drag-and-drop with horizontal scrolling stages
- ✓ **Multi-Owner / Multi-Party Deals** — co-listing agents and split commissions
- ✓ **Commission Calculator** — automatic calculations with custom splits
- ✓ **Commission Payment Tracking** — record payments with custom validation
- ✓ **Deal Auto-Population** — auto-fill from contracts with legal description field
- ✓ **Customizable Deal Dates** — contract, inspection, appraisal, closing & more
- ✓ **Auto Deal Stage Progression** — deals advance when tasks are completed
- ✓ **Deal Notes & Activity Log** — document every step of each transaction
- ✓ **AI Deal Health Monitor** — automated risk analysis and missing-step alerts
- ✓ **Deal Document Storage** — attach contracts, disclosures & files to each deal
- ✓ **QuickBooks IIF Export** — export commissions directly for accounting
- ✓ **Excel, PDF & CSV Reports** — sales, commission & activity reports

Property Management 8

- ✓ **Property Listings** — comprehensive property database with photo galleries
- ✓ **Interactive Map View** — Google Maps integration with property markers
- ✓ **Professional Property Brochures** — single-page PDF marketing sheets
- ✓ **Property Notes** — showing feedback, features & special instructions
- ✓ **Property Banner in Deals** — visual property reference in deal forms
- ✓ **Rental & Lease Management** — track leases, payments & renewals
- ✓ **Dynamic Lease Sections** — customizable lease agreement sections
- ✓ **InstaStage AI Virtual Staging** — AI-powered room staging with furniture styles

Task & Calendar Management 10

- ✓ **Task Manager with Kanban Board** — drag-and-drop task organization
- ✓ **Recurring Tasks** — daily, weekly, monthly & custom schedules
- ✓ **Task Template Library** — pre-built real estate task templates with auto-generation
- ✓ **Task Checklists** — sub-items within tasks for detailed step tracking
- ✓ **Google Calendar Sync** — synchronization of tasks & events with Google Calendar
- ✓ **Integrated Calendar View** — tasks, events & deal deadlines in one calendar
- ✓ **ICS Export & Calendar Invites** — share events via standard calendar format
- ✓ **Daily Task Notifications** — automated email digest of upcoming & overdue tasks
- ✓ **Task-to-Deal Linking** — associate tasks with specific deals for auto-progression
- ✓ **Manual Events** — create custom events independent of tasks or deals

Communication & Email 9

- ✓ **Email Composer** — professional email creation with rich text formatting
- ✓ **AI Email Writing** — generate professional emails with one click
- ✓ **Email Template Library** — save and reuse common email formats by category
- ✓ **Bulk Email Sending** — mass communications to CRM segments
- ✓ **Inbound & Outbound Email Tracking** — log sent and received emails per contact
- ✓ **Inbound Email Webhooks** — process incoming emails automatically
- ✓ **Client Review Requests** — automated review solicitation after closing
- ✓ **SMS / Text Messaging** — two-way text conversations via Twilio
- ✓ **Click-to-Call** — Twilio-powered outbound calling from any phone field

ERICA — AI Virtual Receptionist 14

- ✓ **24/7 AI Phone Answering** — never miss a call, even after hours
- ✓ **Conversational AI** — natural speech recognition with real-time transcription
- ✓ **Live Agent Handoff** — transfer to a real agent when needed
- ✓ **Call Recording & Playback** — review conversations anytime
- ✓ **Automatic Lead Capture** — caller info saved to CRM automatically
- ✓ **Custom Greeting & Responses** — brand-specific phone experience
- ✓ **Live Call Dashboard** — real-time monitoring of active & recent calls
- ✓ **Call Log Management** — searchable history with PDF export
- ✓ **SMS Call Alerts** — instant text & email notifications for new calls
- ✓ **AI Daily Briefing** — personalized morning summary of tasks, deals & calls
- ✓ **ERICA Chat Assistant** — ask questions about your CRM data in plain English
- ✓ **AI Market Updates** — social-media-ready market copy generated on demand
- ✓ **Appointment Booking** — schedule appointments with Google Calendar sync
- ✓ **Voice-to-Text Input** — dictate messages to ERICA hands-free

Softphone & Browser Calling 4

- ✓ **In-Browser Softphone** — make and receive calls directly from your browser
- ✓ **Click-to-Call from CRM** — call any contact with one click from their record
- ✓ **Phone Number Management** — search, purchase & assign local phone numbers
- ✓ **Outbound Call Logging** — automatic call status tracking & duration

AI-Powered Intelligence 9

- ✓ **AI Contract Analysis** — GPT-4o Vision OCR for automatic data extraction
- ✓ **AI Receipt Scanner** — snap a photo to auto-extract expense data with compression
- ✓ **AI Business Card Scanner** — front & back scanning with combined extraction
- ✓ **AI Dashboard Search** — natural language search across all CRM data
- ✓ **AI Broker Assistant** — instant answers to real estate questions
- ✓ **AI Prompts Library** — pre-built prompts for negotiations, marketing & more
- ✓ **AI Web Search** — live market data and real estate statistics lookup
- ✓ **AI Usage Tracking** — per-tenant token counting & cost guardrails
- ✓ **Mobile Camera Support** — HTML5 camera with image compression & enhancement

IntelliPage Word Processor 8

- ✓ **Rich Text Editor** — full formatting with fonts, sizes, colors, alignment, lists & spacing
- ✓ **Office-Style Ribbon** — familiar Home, Insert, and AI tabs like Microsoft Word
- ✓ **AI Writing Assistant** — draft documents from prompts, review writing, spell check & translate
- ✓ **Send to E-Signature** — one-click conversion to e-signature contract with signer assignment
- ✓ **Template Gallery** — save and reuse templates organized by category
- ✓ **Share & Email** — public share links and direct email with company branding
- ✓ **Image Support** — insert images with drag-to-reposition and text wrapping
- ✓ **Auto-Save & Print** — automatic saving, multi-page print, undo/redo & word count

Electronic Signature System 9

- ✓ **Full E-Signing Workflow** — upload or create contracts, add signers, collect signatures
- ✓ **PDF & HTML Contract Upload** — support for multiple document formats
- ✓ **Built-In Contract Templates** — start from pre-built templates
- ✓ **Multi-Signer Support** — assign multiple signers with roles
- ✓ **External Signer Access** — secure token-based links for outside parties
- ✓ **3-Step Signing Process** — review, sign & confirm with multiple capture methods
- ✓ **In-Browser PDF Annotation** — edit and annotate contracts directly
- ✓ **SHA-256 Document Hashing** — tamper detection for legal integrity
- ✓ **Signed PDF Generation** — WeasyPrint output with embedded signatures & audit trail

Document Library & Resources 9

- ✓ **Document Upload & Organization** — categorize by deal, customer, agent or vendor
- ✓ **Category-Based Filtering** — find documents quickly with search & tags
- ✓ **Multi-File Upload** — upload multiple documents at once
- ✓ **Start E-Signature from Library** — launch signing workflow directly
- ✓ **File Preview & Download** — preview documents in-browser
- ✓ **Resource Center** — downloadable templates in categorized accordion layout
- ✓ **Training Guides** — built-in guides with sections and reference materials
- ✓ **Agent File Drawers** — dedicated document storage per agent record
- ✓ **Referral Agreement Downloads** — ready-to-use partnership documents

Referral Management 7

- ✓ **Referral Partner Directory** — manage external agents & brokerage relationships
- ✓ **Referral Assignment System** — track inbound & outbound referrals per agent
- ✓ **Referral Status Tracking** — pending, accepted, closed & outcome tracking
- ✓ **Referral Follow-Up Dashboard** — centralized view of all open referrals
- ✓ **Referral Fee Tracking** — record referral fees and commission splits
- ✓ **Digital Referral Agreements** — generate and manage referral contracts
- ✓ **Referral Update Log** — timestamped notes and status changes per referral

Financial Tools 10

- ✓ **Business Expense Tracking** — categorized expenses with reporting
- ✓ **AI Receipt Scanner** — snap a photo to auto-extract expense data
- ✓ **Recurring Expense Automation** — auto-generate expenses on schedule
- ✓ **Mileage Tracker** — IRS-compliant mileage logging for tax deductions
- ✓ **Investment Calculator** — ROI analysis with PDF reports & email sharing
- ✓ **Closing Cost Calculator** — buyer/seller net sheets with PDF export
- ✓ **Commission Calculator** — split calculations with PDF & email output
- ✓ **Rental Payment Processing** — Stripe integration for tenant payments
- ✓ **Stripe Connect Payouts** — owner payouts via Stripe Connect
- ✓ **QuickBooks Online Integration** — sync financial data with QuickBooks

Open House Management 5

- ✓ **Open House Scheduling** — create and manage all your open houses
- ✓ **Digital Sign-In Sheets** — capture visitor info on any device
- ✓ **Automatic Lead Import** — visitors automatically added to CRM
- ✓ **Attendance Tracking** — view visitor history and follow-up status
- ✓ **Open House Photo Gallery** — upload and manage event photos

Vacation Rental Management 15

- ✓ **Reservation System** — full booking lifecycle with calendar & pipeline views
- ✓ **Guest Profiles** — detailed guest database with bulk upload support
- ✓ **Rental Pricing & Availability** — seasonal pricing rules & availability blocks
- ✓ **Cleaning Schedules** — housekeeping management linked to reservations
- ✓ **Maintenance Tickets** — property repair tracking with status updates
- ✓ **Guest Communications** — message templates, automations & inbox
- ✓ **Rental Agreements** — customizable lease templates with e-signing
- ✓ **Rental Invoicing** — automated invoices with payment tracking
- ✓ **iCal Channel Sync** — sync with Airbnb, VRBO & other platforms
- ✓ **Owner Portal & Statements** — owner access with financial reports & documents
- ✓ **Reservation Task Lists** — automated task checklists per booking
- ✓ **Rental Expense Tracking** — property-specific expense management
- ✓ **Rental Tax Records** — tax document management for rental income
- ✓ **Rental Document Center** — organized file storage per property & reservation
- ✓ **Rental Payment Processing** — Stripe-powered guest payments

Agents, Vendors & Team 9

- ✓ **Agent Profiles & Directory** — manage licenses, headshots, contact info & production details
- ✓ **Agent Document File Drawers** — per-agent document storage & management
- ✓ **Agent Bulk Upload** — import agent rosters from CSV with sample templates
- ✓ **Agent Export** — Excel, PDF & CSV export of agent directory
- ✓ **Preferred Vendor Directory** — manage vendor network with bulk upload & categories
- ✓ **Vendor Payment & 1099 Tracking** — record payments, generate 1099 records & W9 storage
- ✓ **Vendor Locations** — multi-location tracking per vendor
- ✓ **Saved Broker Profiles** — quick-access broker directory for deal assignments
- ✓ **User Profile Management** — personal settings, timezone & preferences

Compliance & Checklists 5

- ✓ **Compliance Document Checklist** — state-specific templates with item tracking
- ✓ **Compliance Notes** — per-deal compliance documentation and annotations
- ✓ **Approval Tracking** — track broker review and sign-off status
- ✓ **Terms of Service Enforcement** — global before-request TOS check
- ✓ **Audit Trail** — complete log of all system actions

Notes Center & Reporting 7

- ✓ **Centralized Notes Center** — view and manage notes across all records
- ✓ **Note Folders & Organization** — folder system with saved views for fast access
- ✓ **Commission Reports** — detailed agent commission summaries
- ✓ **Sales Activity Reports** — deal volume, pipeline & performance
- ✓ **Customer & Lead Reports** — lead source and conversion analysis
- ✓ **Mileage Reports** — IRS-ready mileage summaries with export
- ✓ **Export to Excel, PDF, CSV & IIF** — flexible data export for accounting

Multi-Tenant SaaS Platform 10

- ✓ **Tenant Isolation** — complete data separation between organizations
- ✓ **User Roles & Permissions** — owner, admin, agent, staff & viewer roles
- ✓ **Subscription Billing** — Stripe-powered plan management
- ✓ **Feature Gating by Plan** — tiered feature access based on subscription
- ✓ **Usage Limits & Monitoring** — track usage against plan limits with alerts
- ✓ **Onboarding Wizard** — guided 4-step setup for new tenants
- ✓ **Team Invitations** — invite and manage team members
- ✓ **Billing Status Banners** — proactive payment and plan notifications
- ✓ **Tenant Profile Dashboard** — Stripe status, usage, activity & limits
- ✓ **Tenant Health Scoring** — automated monitoring of account health

Platform Administration 8

- ✓ **Platform Admin Dashboard** — god-mode tenant and system management
- ✓ **Revenue Analytics** — MRR, ARR & churn metrics with snapshots
- ✓ **Support Ticket System** — handle tenant support requests
- ✓ **Tenant Impersonation** — session-based with read-only safety mode
- ✓ **Impersonation Safety Banner** — persistent visual indicator & CSRF protection
- ✓ **Audit Log Viewer** — full activity logging for compliance
- ✓ **Tenant Suspend / Reactivate** — manage tenant status & trial resets
- ✓ **Platform Notifications** — system-wide announcements to all tenants

Notifications & Integrations 9

- ✓ **Real-Time In-App Notifications** — alerts and dashboard banners
- ✓ **Daily Email Briefings** — automated task, deal & activity digest
- ✓ **Google Calendar Integration** — sync events via Replit Connectors
- ✓ **QuickBooks Online Integration** — financial data sync & export
- ✓ **Stripe Integration** — billing, payouts & payment processing
- ✓ **Twilio Integration** — phone calls, SMS, recording & AI receptionist
- ✓ **Resend Email Service** — transactional email delivery & webhooks
- ✓ **SendGrid Email Service** — high-volume email sending support
- ✓ **OpenAI Integration** — GPT-4o & GPT-4o-mini for AI features throughout

User Experience 8

- ✓ **Mobile-First Responsive Design** — works on any device, any screen size
- ✓ **Dark / Light Mode** — user-selectable theme preference
- ✓ **Bilingual Support** — full English and Spanish language access
- ✓ **Fixed Sidebar Navigation** — desktop sidebar, mobile top navbar
- ✓ **Custom Branding** — 3D styling with colored accent boxes
- ✓ **Bulk Data Import & Export** — CSV, Excel, PDF for all major data
- ✓ **Guided Onboarding Tour** — interactive walkthrough for new users
- ✓ **Promotional Website** — public-facing marketing, pricing & signup pages

Starter	Pro	Team	Enterprise
$29/mo	$79/mo	$199/mo	$499/mo
Up to 50 customers	Up to 250 customers	Up to 1,000 customers	Unlimited everything
Essential features	AI features included	Multi-user access	Priority support

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