PropCore AI

Builder Platform

COMPLETE FEATURE GUIDE

For Real Estate Builder Teams

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Introduction

PropCore is a purpose-built platform for real estate builders and their teams. It replaces fragmented spreadsheets, WhatsApp threads, and disconnected tools with a single unified workspace — making it easier to manage projects, leads, brokers, campaigns, and bookings from one place.

This guide covers every feature available in the Builder workspace (also referred to as the Admin role), explains how each area works, and shows how PropCore compares to the way these tasks were managed before.

Who is this guide for?

This document is intended for builder account owners, team leads, and any staff member who needs to understand the full capabilities of the PropCore builder workspace.

If you are a super admin or a broker user, you will have a different set of screens and permissions not covered in this guide.

1. Account Creation & Sign-In

Getting started with PropCore is designed to be quick. Builders can self-register directly from the public signup page without needing any pre-provisioned credentials.

1.1 Signing Up as a Builder

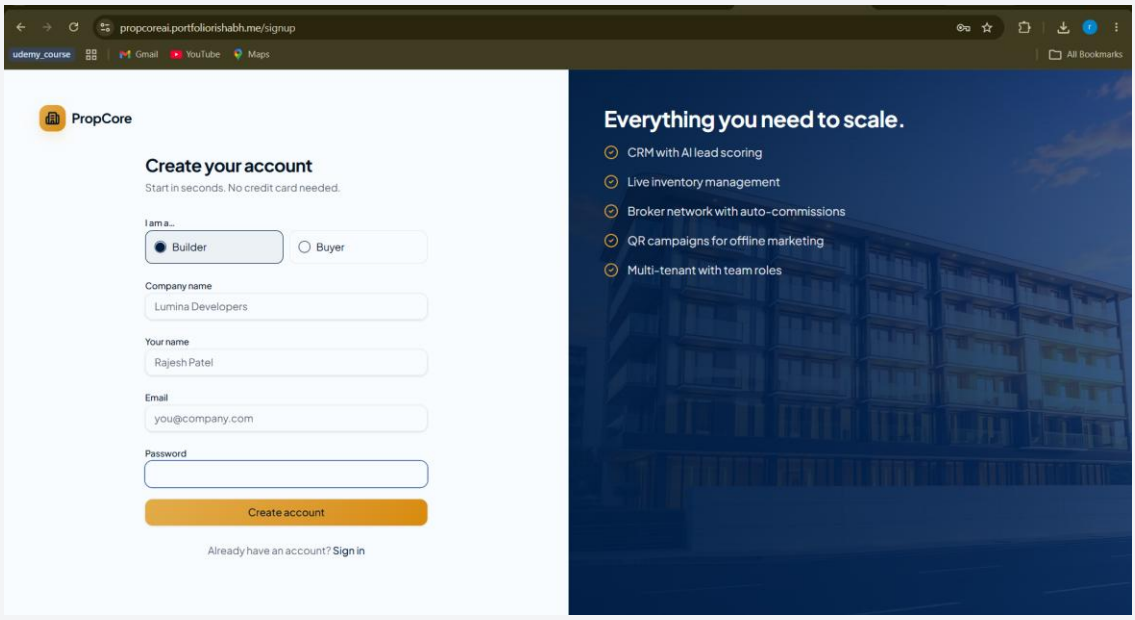
Navigate to /signup in your browser. The page presents an account type selector — choose Builder to proceed with the builder registration flow.

Complete the following fields:

1. Company Name — the legal or brand name of your real estate firm.
2. Full Name — the account owner's full name.
3. Email Address — used for login and all platform notifications.
4. Password — must meet the platform's minimum security requirements.

After submitting the form, PropCore creates your Supabase authentication account and assigns the admin role automatically. You are then redirected to your builder dashboard at /admin.

Screenshot: /signup page — Builder account type selected

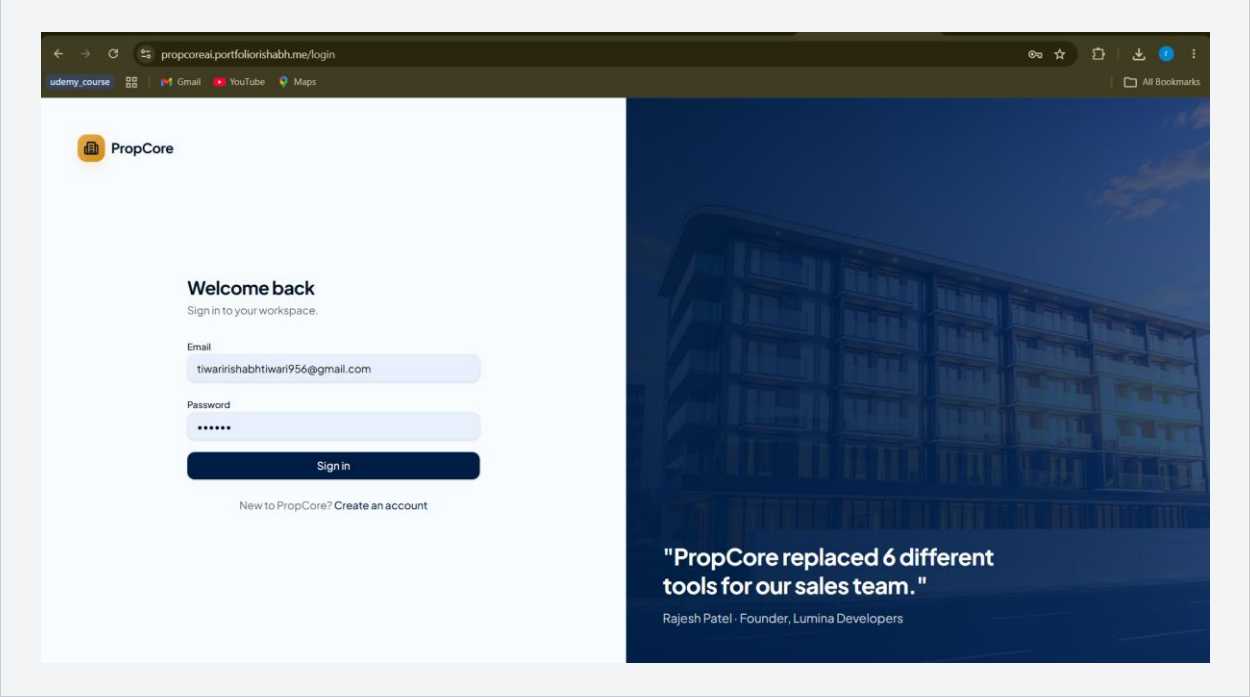


1.2 Signing In

Return to /login to sign in at any time. PropCore reads the role attached to your account and sends you to the correct workspace automatically:

Role	Redirected to
admin (Builder)	/admin — Builder workspace dashboard
super_admin	/super-admin — Platform administration
user	/profile — Standard user profile

Screenshot: /login page



Important: Super Admin accounts

The super_admin role cannot be self-assigned from the public signup flow. It must be granted directly in the database by a platform administrator. Builders should always sign up as Builder.

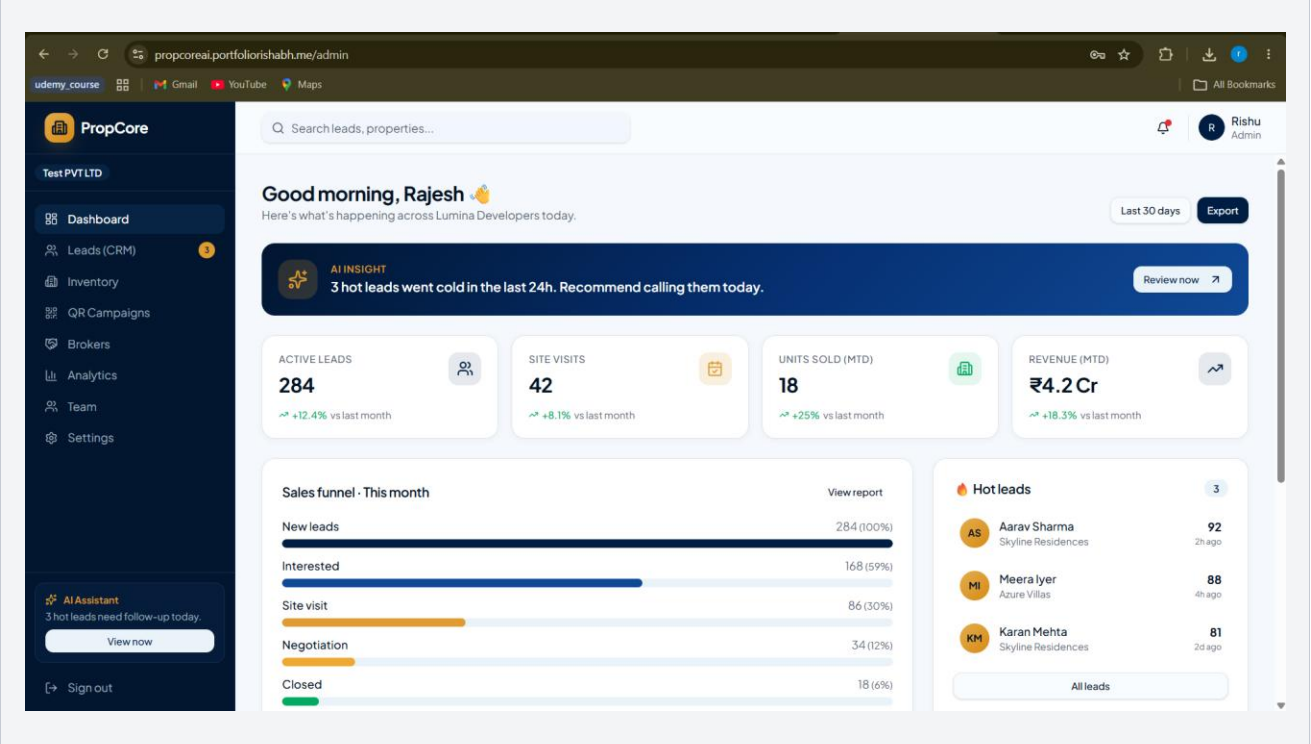
2. Dashboard

The dashboard is the first screen you see after signing in. It gives you an at-a-glance operational summary so you can start your working day with full context — without opening multiple tabs or making calls to your team.

2.1 What You Can See

- Summary metrics — total leads, site visits, active inventory, and conversions.
- Active leads panel — leads that have been recently updated or require follow-up.
- Site visit and sales progress — visual progress indicators.
- Live inventory cards — unit availability across your projects.
- Hot lead follow-up actions — flagged leads that need immediate attention.
- AI-style insights and reminders — automated nudges based on your data.

Screenshot: Builder Dashboard — full view showing metrics, leads, and inventory cards



2.2 Dashboard Use Cases

The dashboard is designed for two primary scenarios:

5. Morning check-in — review overnight leads, check visit bookings, and see if any hot leads have gone cold.
6. Weekly performance review — compare week-on-week lead volume, visit rates, and revenue metrics without opening analytics.

3. Leads CRM

The Leads CRM is your central record system for every prospective buyer. It replaces scattered contact lists, WhatsApp saved messages, and Excel sheets with a structured, searchable, and assignable lead database.

3.1 What You Can Do

- Create new lead records manually or from inbound enquiries.
- Edit any field on an existing lead at any time.
- Delete leads that are duplicates or irrelevant.
- Assign leads to specific team members for follow-up.
- Link a lead to a specific project in your inventory.
- Track source, budget range, lead score, and current status.
- Filter and search across the full lead database.

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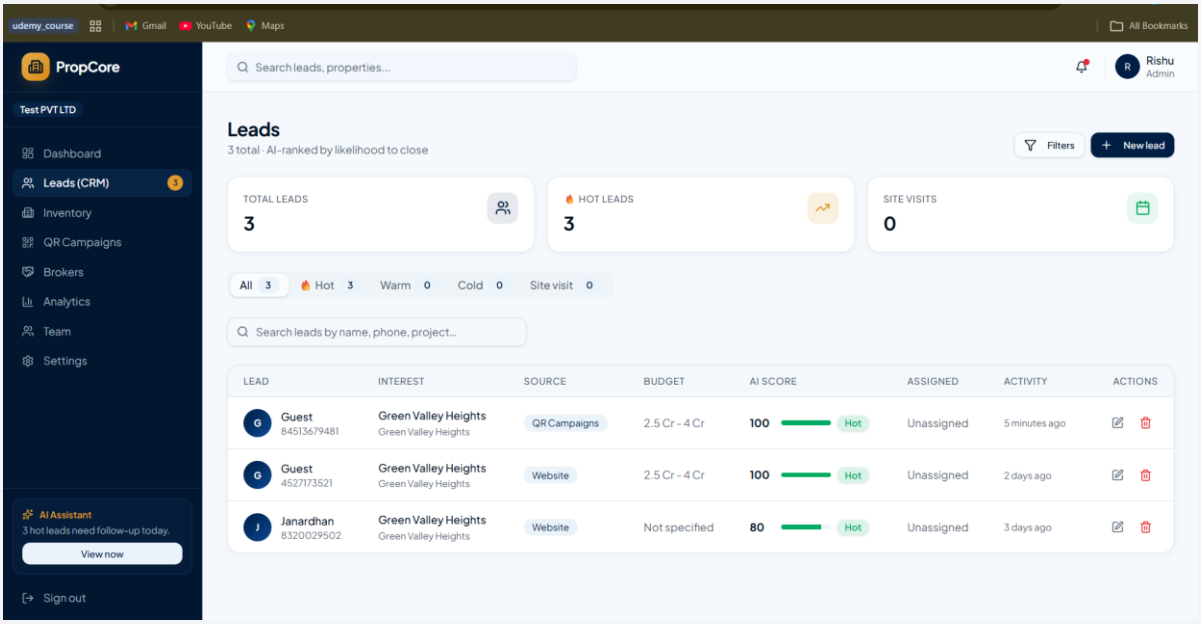
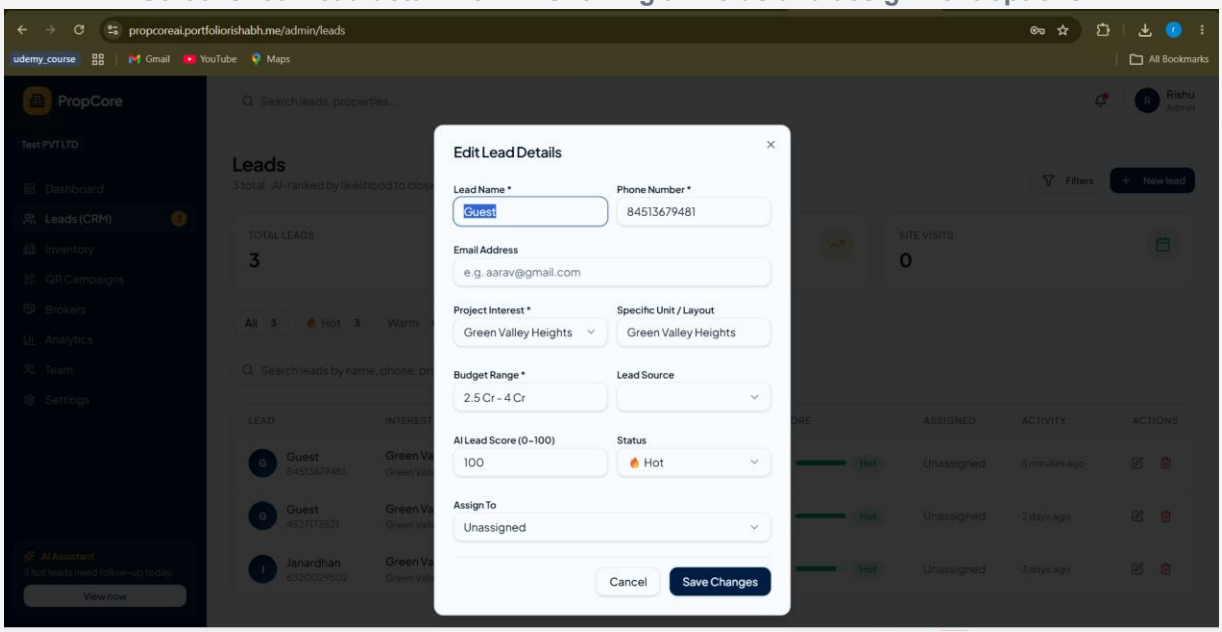
Screenshot: Leads CRM — list view with filters and search active



Screenshot: Lead detail view — showing all fields and assignment options



3.2 Lead Fields Reference

Each lead record stores the following data:

Field	Purpose
Name & Contact	Phone, email, and full name for reaching the buyer.
Source	Where the lead came from — website, QR campaign, broker referral, etc.
Budget Range	Buyer's stated or estimated purchasing capacity.
Lead Score	A numeric or tier rating indicating lead quality.
Status	Current stage: New, Contacted, Site Visit Scheduled, Negotiating, Booked, Lost.
Assigned To	The team member responsible for this lead.
Project	The PropCore project this lead is interested in.
Notes	Free-text field for call notes, follow-up reminders, and context.

4. Inventory

Inventory is your project content management system. Every real estate project you launch — from a single tower apartment complex to a sprawling township — is created, managed, and published from this section.

4.1 Creating a Project

Click New Project to open the project creation form. Fields are grouped into logical sections:

Basic Information

- Project Name, Tagline, Project Type (Residential / Commercial / Mixed)
- RERA Number, Summary, Description, USP (Unique Selling Proposition)
- Status (Pre-launch / Active / Sold Out / Archived)

Pricing & Configuration

- Budget Range (minimum and maximum ticket size)
- Price per Sq. Ft.
- Configurations available (1 BHK, 2 BHK, 3 BHK, etc.)
- Towers, Floors, and Unit Mix

Construction & Amenities

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- Construction Status (Under Construction / Ready to Move / Near Possession)
- Construction Partner name
- Parking Type (Open / Covered / Stilt / Basement)
- Payment Plan details
- Loan Contact information

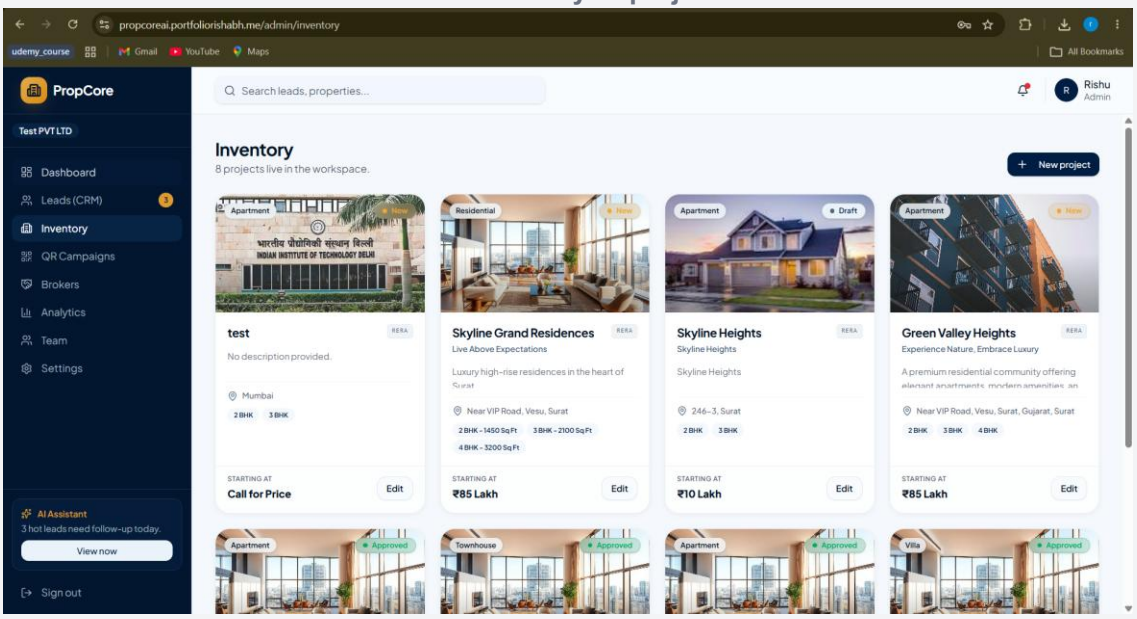
Location & Connectivity

- City, Zone, Address, Pincode
- Landmarks, Commute details
- Distance from Airport and Highway

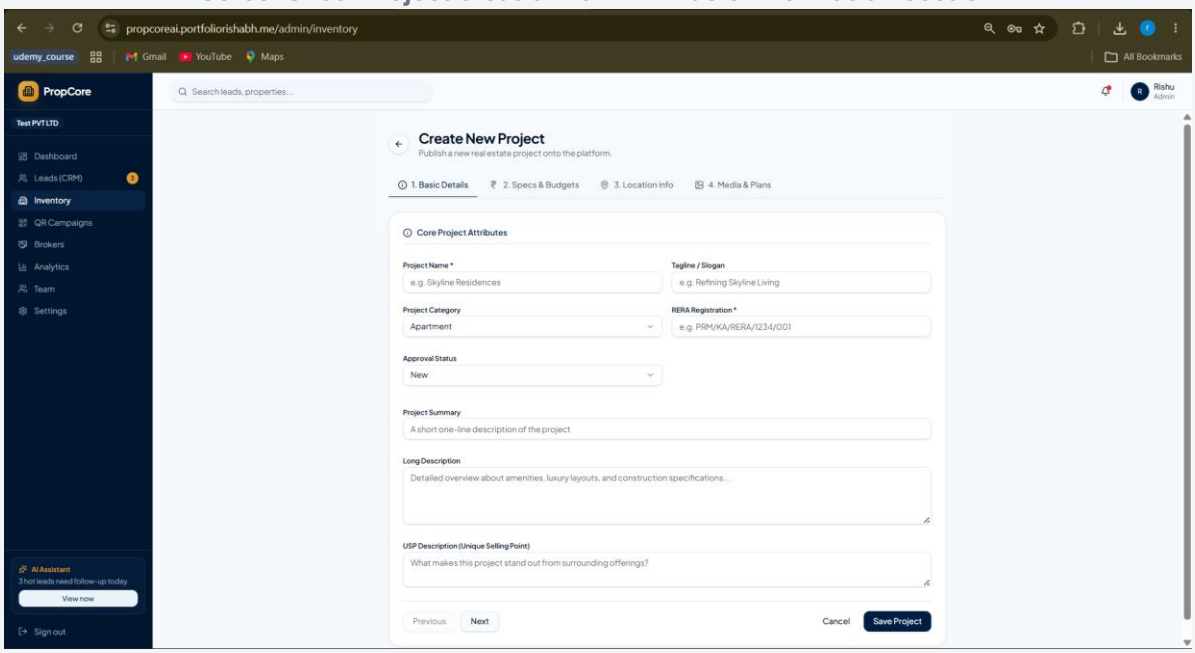
Media & Marketing

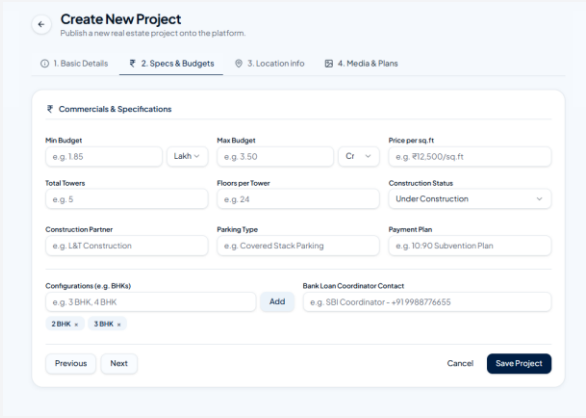
- Cover Image and uploaded media gallery
- Video URL, 360 Tour URL, Podcast URL
- Master Plan (URL or uploaded file)
- Project Highlights (bullet points shown on the project page)
- Internal Notes (not visible to buyers or brokers)

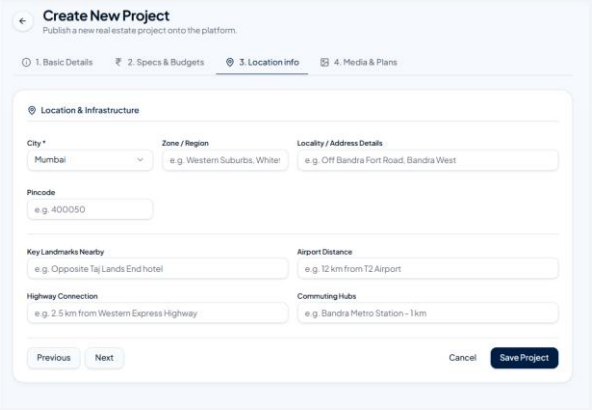
Screenshot: Inventory — project list view



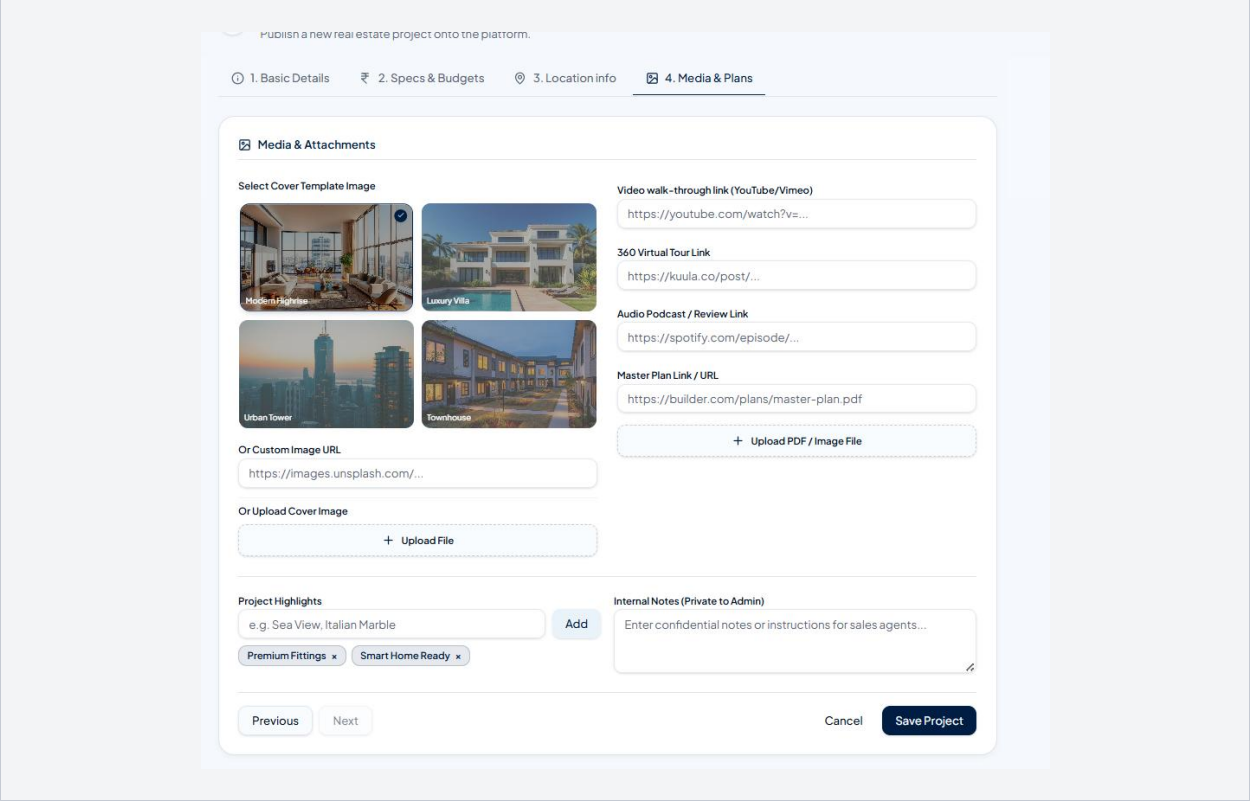
Screenshot: Project creation form — Basic Information section







Screenshot: Project creation form — Media & Marketing section



4.2 Editing and Browsing Projects

- Open any existing project from the inventory list to edit all fields.
- Browse previously created projects with search and filter options.
- Choose from image templates or attach custom media directly from your device.

5. QR Campaigns

The QR Campaigns module bridges your offline marketing materials — hoardings, pamphlets, site banners, newspaper ads — with your digital lead tracking. Every scan of a PropCore QR code creates a traceable inbound event you can attribute directly to a campaign.

5.1 What You Can Do

- Create a new QR campaign and link it to a specific project.
- Set UTM parameters (source, medium, campaign name) for analytics attribution.
- Activate or pause campaigns at any time.
- Copy or download campaign QR assets for use in print materials.
- Print or view a flyer-style campaign output directly from the platform.
- Review campaign-level performance: scan count, lead conversions, and more.

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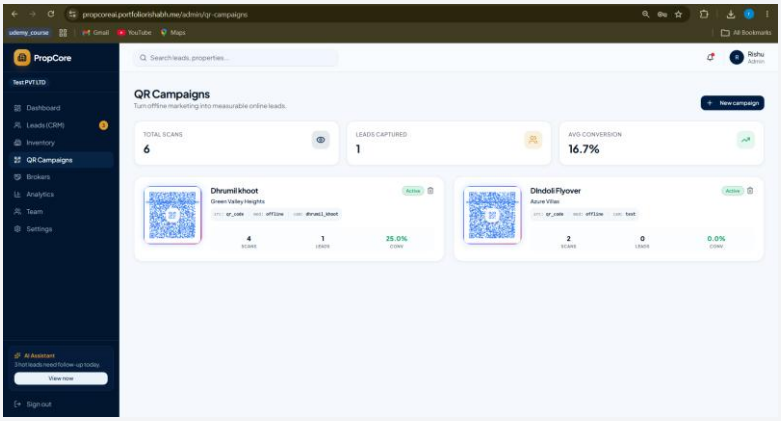
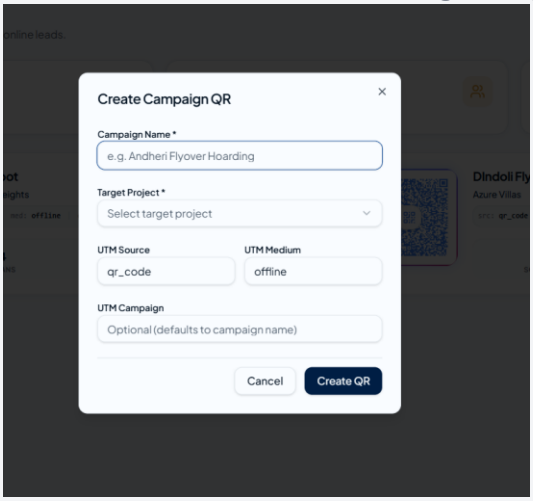
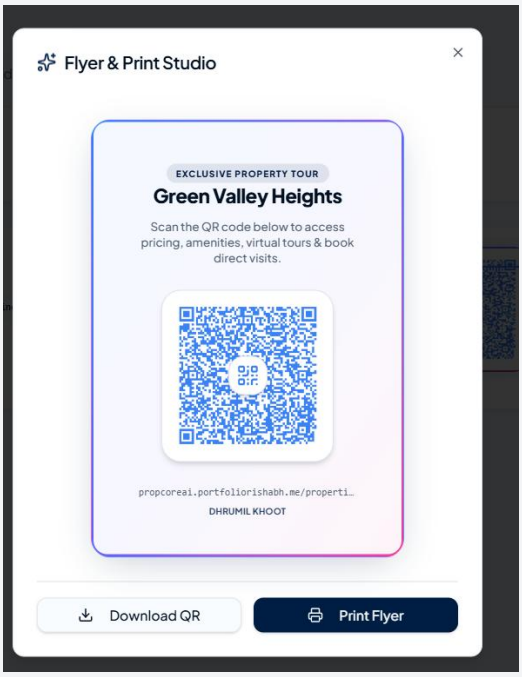
Screenshot: QR Campaigns — campaign list view with status indicators



Screenshot: Campaign detail — QR code with UTM settings and performance summary





5.2 How UTM Tracking Works

PropCore automatically appends UTM parameters to the campaign landing URL. This means every lead who scans your QR code is tagged with the campaign source, medium, and name — letting you see in Analytics exactly which hoarding, pamphlet, or newspaper ad generated that lead.

6. Brokers

The Brokers section is your channel partner management hub. It replaces scattered WhatsApp groups and individual call logs with a structured registry of every broker relationship your firm maintains.

6.1 What You Can Do

- Add new brokers manually with full contact details.
- Invite brokers via contact information — PropCore can send an invitation.
- Edit any broker record at any time.
- Remove brokers who are no longer active partners.
- Assign commission percentage values per broker.
- Track broker status (Active / Inactive).
- Associate a broker with an internal user account when they also use PropCore.

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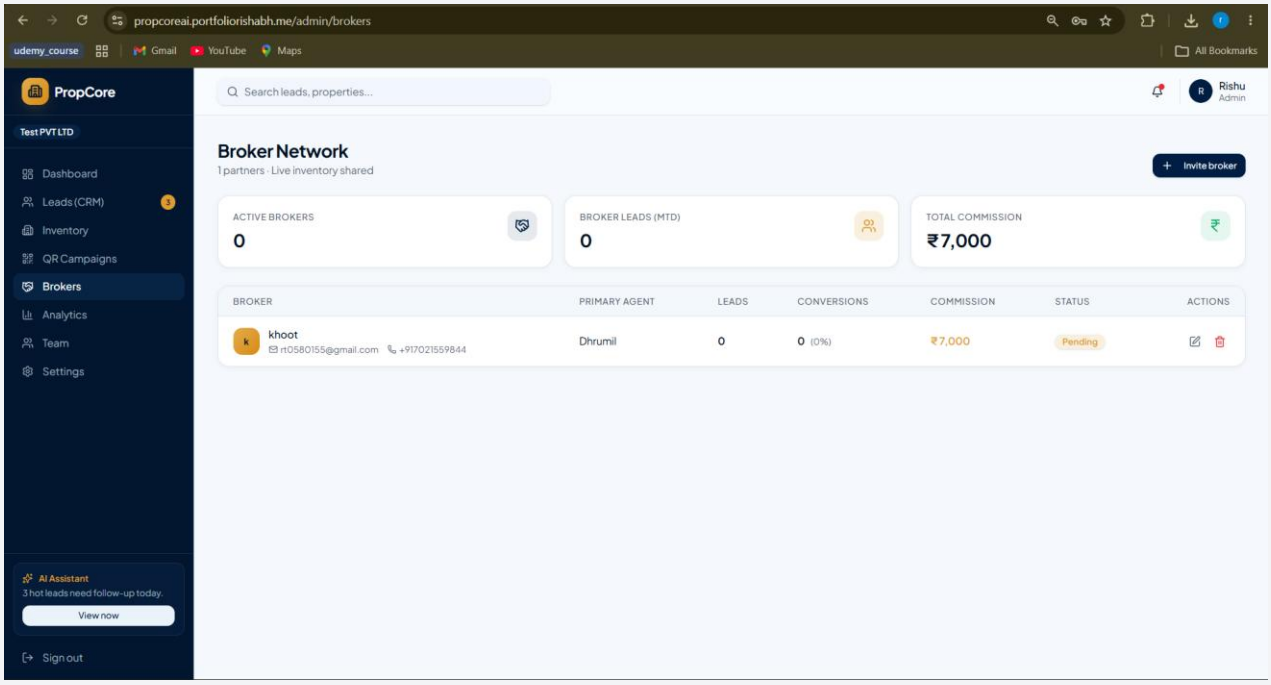
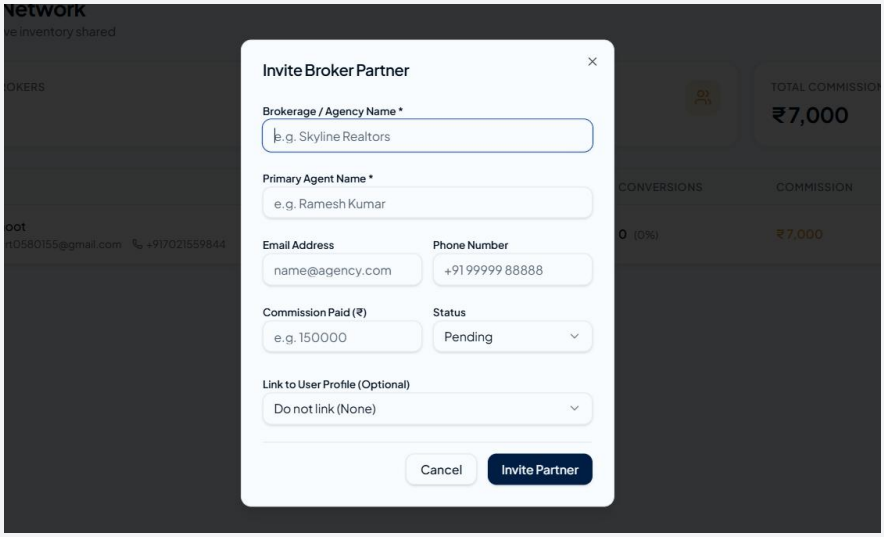
Screenshot: Brokers — list view with commission and status columns



Screenshot: Add Broker form



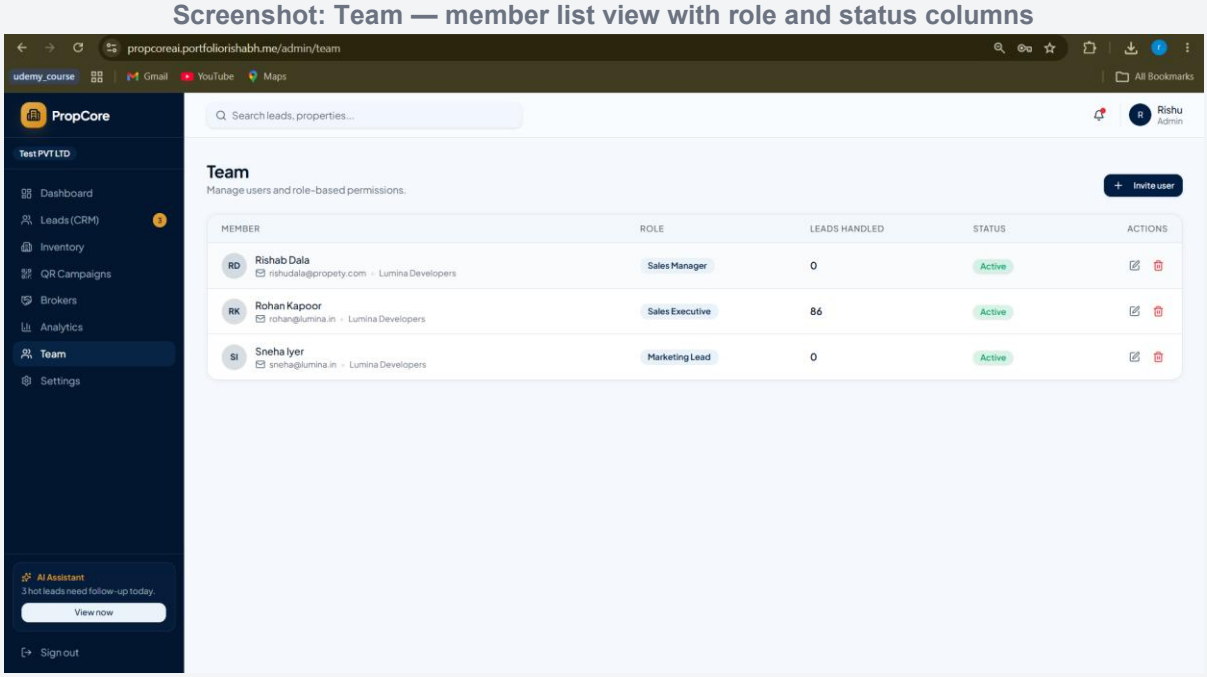
7. Team

The Team section lets you manage everyone who works inside your PropCore builder workspace — sales executives, relationship managers, team leads, and admin staff.

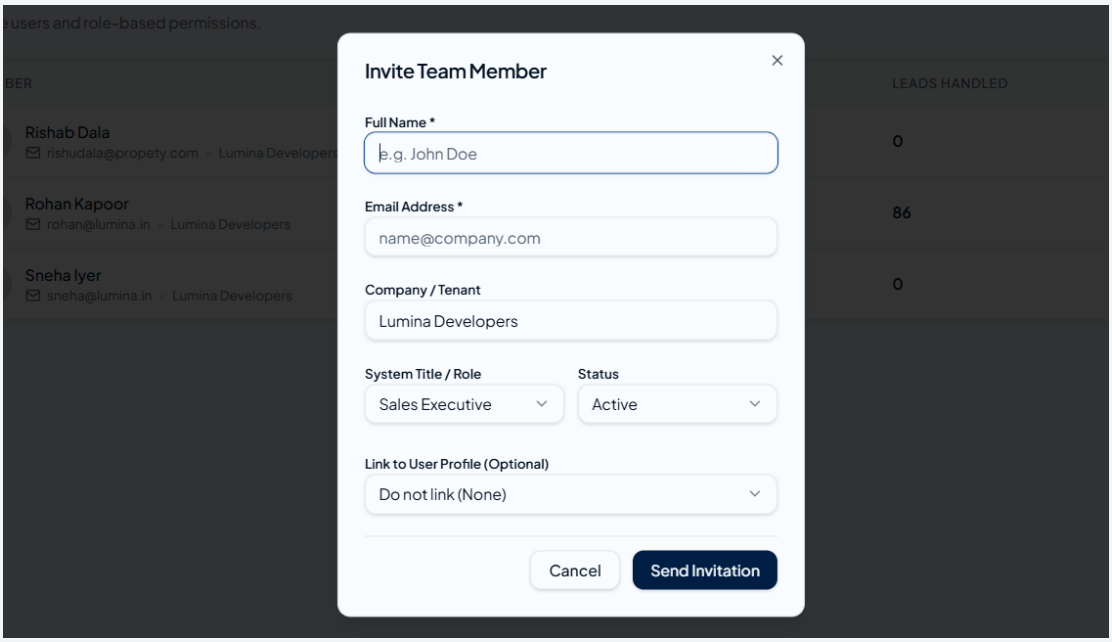
7.1 What You Can Do

- Invite new team members by email.
- Edit team member profiles — name, title, role, and company.
- Remove team members who have left the organisation.
- Set job titles and assign department roles.
- Link a team member entry to their internal PropCore user account.
- Toggle active / inactive status without deleting the account.

Screenshot: Team — member list view with role and status columns



Screenshot: Invite / Edit Team Member form



8. Analytics

Analytics gives you a business performance view across sales, marketing, and project-level activity. It is designed to be reviewed by a builder owner or team lead on a weekly or monthly cadence.

8.1 What You Can See

- Lead volume — total new leads over any selected period.
- Site visit count — how many leads have progressed to a physical visit.
- Conversion rate — percentage of leads that became bookings.
- Revenue metrics — token and booking amounts collected.
- Lead sources breakdown — which channel (QR, broker, website, direct) is performing best.
- Month-by-month trend data — line charts showing lead and visit trends over time.
- Top-performing projects — ranked by lead volume, visits, or conversions.

Screenshot: Analytics — overview showing lead volume chart and source breakdown

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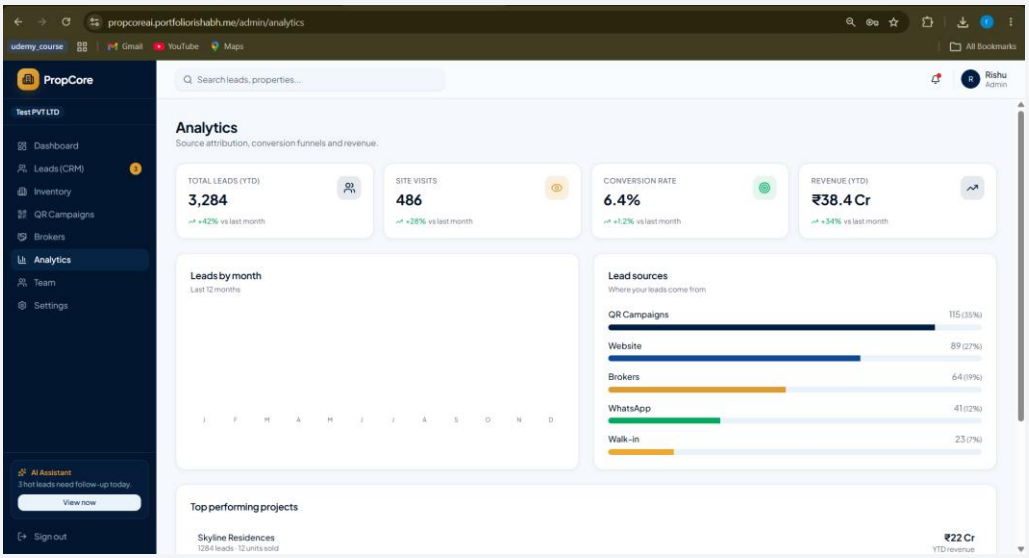
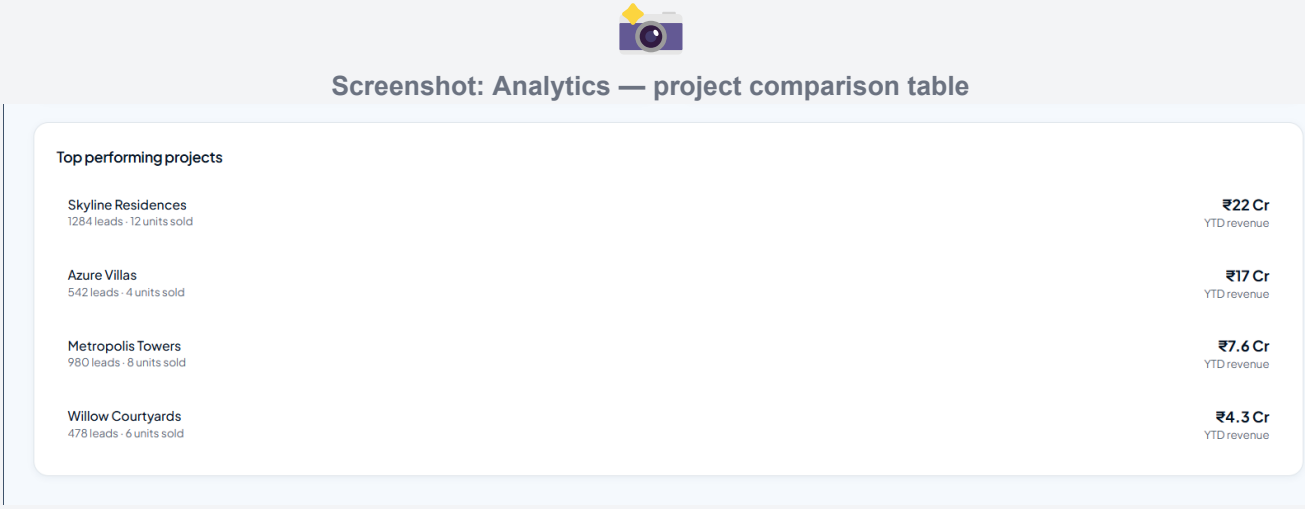


Screenshot: Analytics — project comparison table



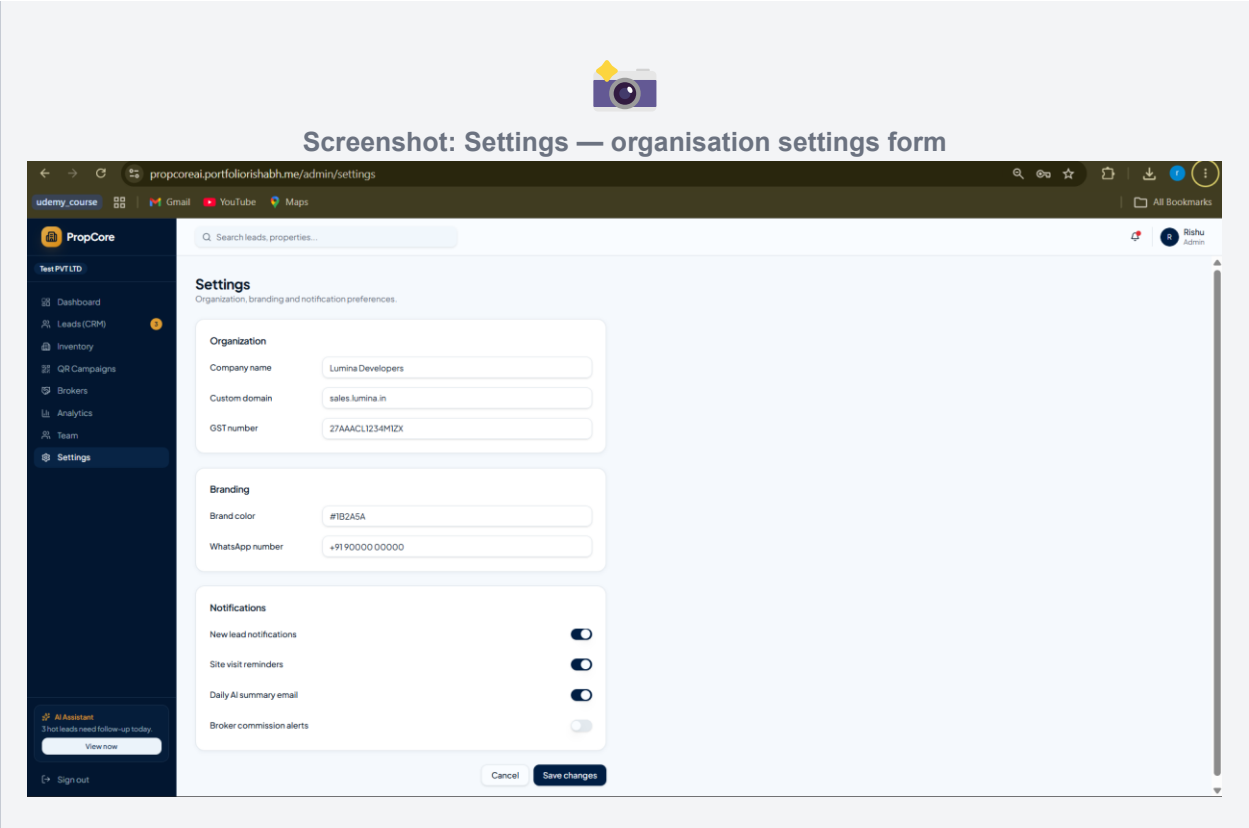
9. Settings

Settings is where you configure your organisation's identity, integrations, and notification preferences on PropCore.

9.1 What You Can Configure

- Company Name — update the name displayed across the platform.
- Custom Domain — connect a branded domain for your project pages.

- GST Details — store your GSTIN for use in booking documents.
- Brand Color — set a primary hex color to theme your public-facing pages.
- WhatsApp Number — link the business number used for buyer communication.
- Notification Preferences — toggle which events trigger email or push alerts.



10. Bookings(Pending)

The Bookings section gives you visibility into all token payments and booking confirmations across your projects. It is a read-and-review area rather than an entry form — bookings are typically created through the lead-to-booking conversion flow.

10.1 What You Can See

- All booking records in a single chronological list.
- Booking ID for each transaction.
- Buyer name and contact details.
- Associated project and unit number.
- Token amount paid and total booking value.
- Current booking status (Pending / Confirmed / Cancelled).

Screenshot: Bookings — list view with buyer, project, unit, and token columns

[Replace this placeholder with actual screenshot]

11. Recommended Onboarding Checklist

Follow these steps when setting up a new PropCore builder account for the first time:

7. Create your builder account at /signup and choose Builder as the account type.
8. Sign in and verify that the /admin dashboard loads correctly.
9. Go to Settings → update your Company Name, Brand Color, GST details, and WhatsApp number.
10. Go to Inventory → create your first project and fill in all fields including media.
11. Go to Leads CRM → add or import your existing lead list.
12. Go to QR Campaigns → create at least one campaign linked to your first project.
13. Go to Brokers → add your active channel partners.
14. Go to Team → invite your sales team members and assign roles.
15. Review Analytics after your first week to baseline your lead volume and sources.

12. Before PropCore vs. With PropCore

This section documents how common real estate builder operations were managed before a platform like PropCore existed — and how the same operations work today. Use this section for internal training, stakeholder presentations, or to demonstrate the business case for adopting the platform.

12.1 Feature-by-Feature Comparison

Feature / Process	Before PropCore	With PropCore
Lead Management	Leads captured in Excel sheets or WhatsApp. No central record. Leads lost when a salesperson leaves.	Every lead stored in the CRM with full history, assignment, and status. Searchable and auditable.
Lead Assignment	Team lead manually forwards WhatsApp messages to sales staff. No tracking of who owns which lead.	Leads assigned with one click in the CRM. Assignment visible to the whole team. Dashboard shows workload.
Project Information	Multiple versions of project brochures in PDF. Outdated	Single source of truth in Inventory. Price, configuration,

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Feature / Process	Before PropCore	With PropCore
	files shared via email and WhatsApp.	media, and RERA details updated in one place.
Offline Campaign Tracking	No way to trace which hoarding, pamphlet, or newspaper ad generated an enquiry.	Every QR campaign links to a specific project and UTM tag. Scan-to-lead attribution in Analytics.
Broker Management	Broker contacts in individual phone books. Commission agreements in separate spreadsheets or verbal.	Broker registry with commission values, status, and contact info. Invite flow for onboarding.
Team Coordination	Team structure tracked in HR software or spreadsheets, disconnected from sales activity.	Team members in PropCore with role, title, and active status. Leads and bookings are linked to team.
Sales Analytics	Weekly or monthly Excel reports compiled manually by a manager. Always 1–2 weeks behind.	Real-time analytics dashboard. Lead volume, visit rate, conversion, and revenue updated live.
Booking Visibility	Bookings tracked in a separate accounting system or CRM. No integration with project inventory.	Bookings visible in PropCore linked to buyer, project, unit, and payment status.
QR / Marketing Assets	QR codes generated from third-party tools. No analytics. No link to project or lead data.	Campaign QR codes generated in-platform. Tied to project, UTM, and live performance data.
Settings & Branding	Brand assets stored in Google Drive or Dropbox. Custom domain set up manually by IT.	Brand color, custom domain, GST, and WhatsApp configured in Settings. No IT dependency.

12.2 Impact Summary

Time Savings

Lead entry and follow-up that previously required manual spreadsheet updates now happens in the CRM.
Campaign performance that required manual Excel tracking is now visible in real time in Analytics.
Weekly report compilation previously took 2–4 hours; Analytics delivers the same view instantly.

Data Quality Improvements

Lead attribution is no longer a guess — UTM tags from QR campaigns link every enquiry to a source.
Broker commission records are stored alongside broker profiles, eliminating version conflicts.
Project data (pricing, configuration, RERA) has a single authoritative version in Inventory.

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Team Accountability
Every lead is assigned to a named team member with a visible status. Nothing falls through the cracks.
Managers can see active lead load per team member from the dashboard without asking individually.
Site visit and conversion rates are visible per team member in Analytics.

13. Builder Permissions Reference

The builder role (admin) has access to all operational areas of the PropCore workspace. The table below summarises which areas a builder can access and what actions are available in each.

Workspace Area	Available Actions	Restricted From
Dashboard	View metrics, insights, hot lead actions	None
Leads CRM	Create, edit, delete, assign, filter leads	None
Inventory	Create & edit projects, manage media	None
QR Campaigns	Create, activate, download, review campaigns	None
Brokers	Add, invite, edit, remove, set commission	None
Team	Invite, edit, remove team members	None
Analytics	View all metrics and trend data	None
Settings	Update org settings and preferences	None
Bookings	View booking records and status	Cannot modify booking status
Super Admin Panel	—	Fully restricted for builder role

14. Notes for Product & Support Teams

The following notes are intended for internal product managers and support staff working with builder accounts.

- Builder accounts use the admin role in Supabase. Do not confuse this with super_admin.
- Post-login routing is determined by the role stored in user metadata. If a builder is being sent to the wrong page, check their role value in Supabase Auth.
- Some builder dashboard views (summary widgets, insights cards) may be connected to seeded or mock data in the current release. Inventory, Leads, Brokers, Team, Campaigns, Settings, and Bookings pull from live Supabase tables.

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- If a builder reports data not appearing after adding a record, first check the relevant Supabase table directly.
- The super_admin role must be granted at the database level — there is intentionally no self-service path for this role.

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