

 Industry Best

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1. About This Case Study

This case study outlines the design and implementation of a **Real Estate SaaS CRM platform** that enables real estate organizations to manage their teams, jobs, and property inspections in a centralized system.

The platform is built with a **multi-tenant architecture**, allowing multiple organizations to operate independently within the same system.

2. Product Goals

The primary objectives of the platform are:

- Enable real estate organizations to **quickly onboard via self-signup**
 - Provide controlled access through **admin-approved subscriptions**
 - Allow organizations to **manage teams and roles efficiently**
 - Ensure field teams have **restricted, task-based access**
 - Streamline operations around:
 - **Job Management**
 - **Inspection Management**
-

3. User Roles & Access Control

A. Super Admin (Platform Owner)

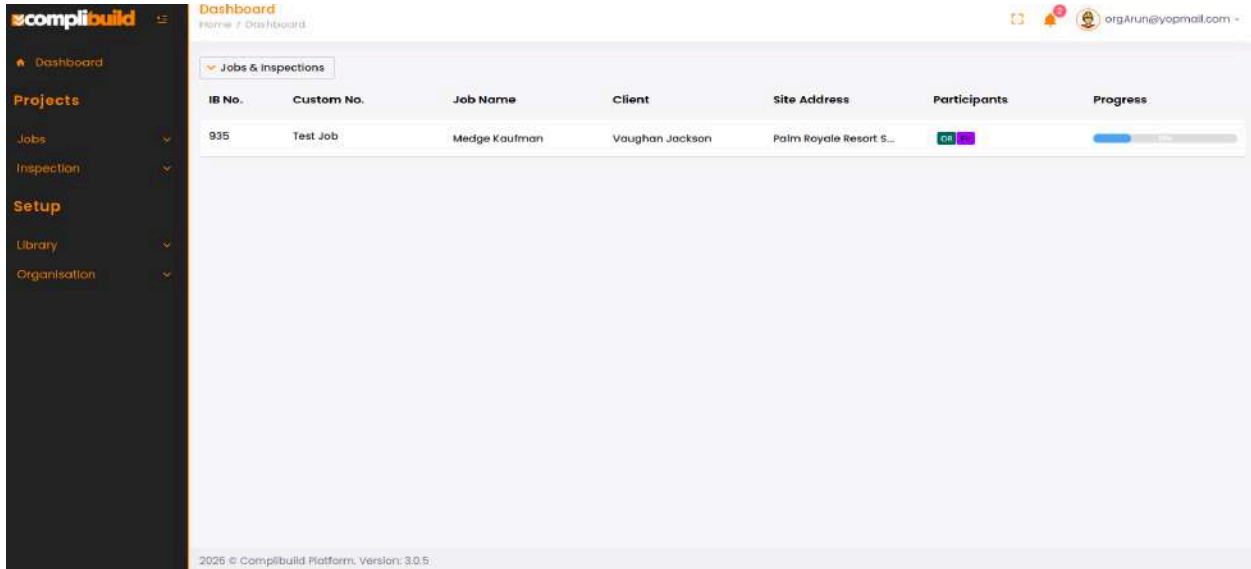
- Manages organization approvals
- Grants/revokes platform access
- Handles subscription lifecycle

B. Organization Admin

- Manages internal users (agents, inspectors, staff)
- Assigns roles & permissions
- Creates and monitors jobs & inspections

C. Members (Agents / Inspectors)

- Limited access based on assigned tasks
- Can only view and act on:
 - Assigned Jobs
 - Assigned Inspections



4. Authentication & Access Flow

1. Organization signs up on the platform
2. Access remains **restricted until admin approval**
3. Organization contacts admin for subscription purchase
4. Once approved:
 - Organization gets **full access**
 - Can onboard team members
5. Users log in and access only **role-specific dashboards**



Register to CompliBuild

Please enter the details to register.

First Name

Last Name

Email

Password

By registering you agree to the CompliBuild's [Terms of Use](#).

Already have an account? [Log In](#)

5. Core Modules

5.1 Organization & User Management

- Multi-user onboarding
- Role-based access control (RBAC)
- Permission mapping
- User activity tracking

The screenshot shows the 'Manage Users' page in the compliBuild application. The page header includes the logo, navigation menu, and user profile. A notification banner states: 'Licensed for Org Owner with 9 Web & 10 Mobile Users. End Date: 21-May-2027'. An 'Add a User' button is visible in the top right. The main content area features a table with the following data:

#	Display Name	Email	Type	Onboard Status	Action
1	Flavia Horton Vernon Morrow	tiloqe@malinator.co...	web	Active	
2	Ima Finch	godetyim@yopmail.com	web	Active	

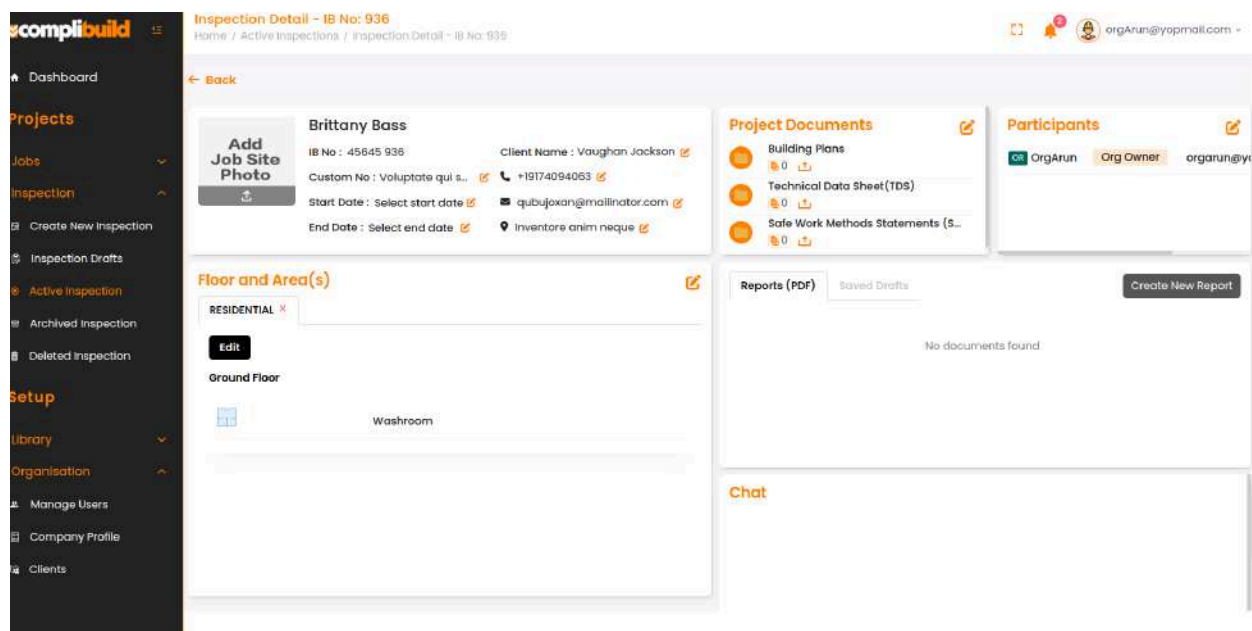
The screenshot shows the 'Manage Users' page with an 'Add User' modal form open. The modal form contains the following fields:

- First Name
- Last Name
- Email
- Type (dropdown menu)
- Save button

5.2 Job Management Module

Key Features:

- Multi-step job creation workflow
- Assign multiple team members to a job
- Track job progress and status
- Centralized job listing



Workflow:

1. Background

In real estate operations, creating a job is a critical starting point that defines the scope of work, assigns responsibilities, and ensures structured execution across teams.

Traditional systems often lack standardization, leading to:

- Incomplete data capture
- Poor task clarity
- Inefficient collaboration

To solve this, the platform introduces a **guided, multi-step job creation workflow**.

2. Objective

Design a **structured and scalable job creation system** that:

- Captures all essential job data
 - Standardizes workflows across organizations
 - Enables team collaboration
 - Prepares jobs for execution and inspections
-

3. Solution Approach

A **6-step guided wizard** was implemented to simplify job creation while ensuring completeness and accuracy.

Each step focuses on a specific data layer, progressively building a fully structured job entity.

4. Job Creation Workflow

Step 1: Job Details

The first step captures foundational information about the job and the client.

Key Inputs:

- Job Name (*mandatory*)
- Custom Job Number (optional)
- Client Details (Name, Email, Phone)
- Site Address
- Client Address (with auto-fill option)

System Behavior:

- Validates mandatory fields
- Integrates address auto-suggestion

- Supports quick data entry via address duplication

Outcome:

A draft job entity is initialized with core metadata.

The screenshot shows the 'Create New Job' interface in the CompliBuild system. The page title is 'Create New Job' and the breadcrumb is 'Home / Create New Job'. The user is logged in as 'argArun@yopmail.com'. The main content area is titled 'Job Details' and '1/6' steps. Below the title, it says 'Enter the details below'. The form has the following fields:

- Custom Job no.: Ut dolorem ullamco t
- Client Name: Vaughan Jackson
- Job Name *: Tana Stephens
- Client Email: qubujaxan@mallinator.com
- Job Phone Number: +10713025432
- Client Phone Number: +10174094063
- Site Address: Saepe velit quidem
- Client Address: Saepe velit quidem (checked 'Same as Site Address')

At the bottom right, there are three buttons: 'Save', 'Next', and 'Quick Create'.

Step 2: Job Category

This step classifies the job based on its nature.

Options:

- Residential
- Commercial
- Infrastructure

Each category further includes:

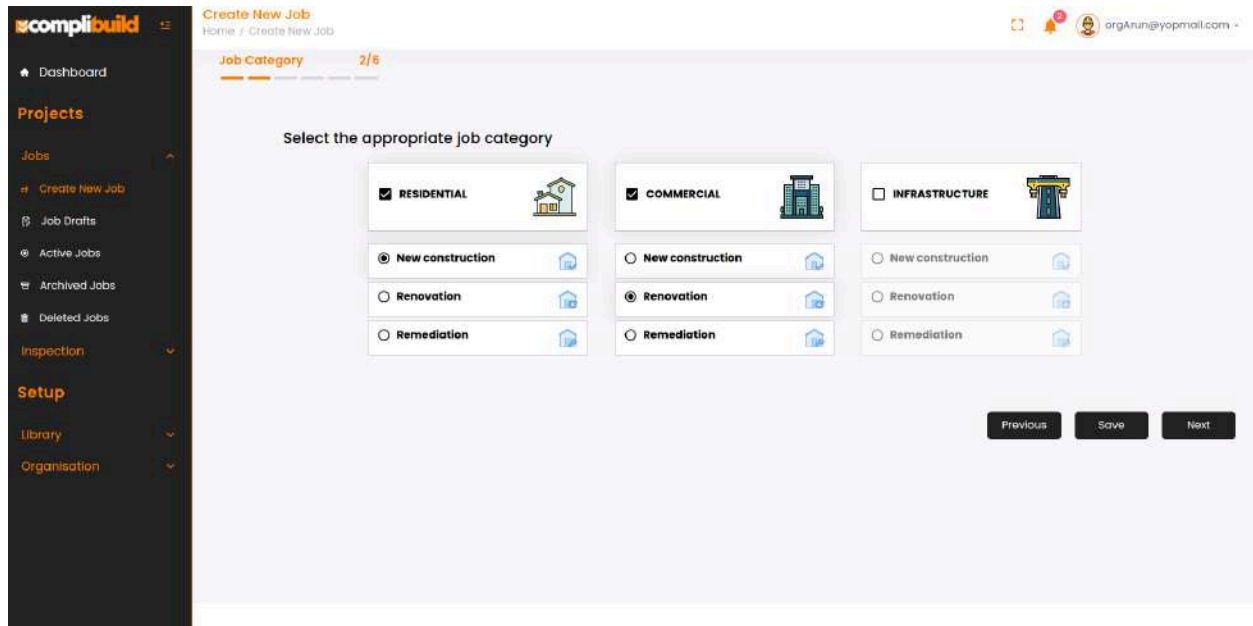
- New Construction
- Renovation
- Remediation

System Behavior:

- Tags the job with category metadata
- Drives conditional logic for downstream steps

Outcome:

Job classification is defined, enabling contextual workflows.



Step 3: Building Class

This step ensures regulatory and structural classification of the property.

Key Inputs:

- Multi-select building classes (Class 1a to Class 10c)

System Behavior:

- Stores compliance-related classifications
- Enables future integration with regulatory workflows

Outcome:

The job is aligned with building standards and classifications.

CREATE NEW JOB
Home / Create New Job

Building Class 3/6

Classification of building

RESIDENTIAL COMMERCIAL

Select all the appropriate class that are applied 3/16 Selected

<input checked="" type="checkbox"/> Class 1a	<input type="checkbox"/> Class 1b	<input type="checkbox"/> Class 2
<input checked="" type="checkbox"/> Class 3	<input type="checkbox"/> Class 4	<input type="checkbox"/> Class 5
<input type="checkbox"/> Class 6	<input checked="" type="checkbox"/> Class 7a	<input type="checkbox"/> Class 7b
<input type="checkbox"/> Class 8	<input type="checkbox"/> Class 9a	<input type="checkbox"/> Class 9b
<input type="checkbox"/> Class 9c	<input type="checkbox"/> Class 10a	<input type="checkbox"/> Class 10b
<input type="checkbox"/> Class 10c		

Classify Your Job

Previous Save Next

Step 4: Floor & Areas Configuration

This step defines the physical scope of the job.

Key Inputs:

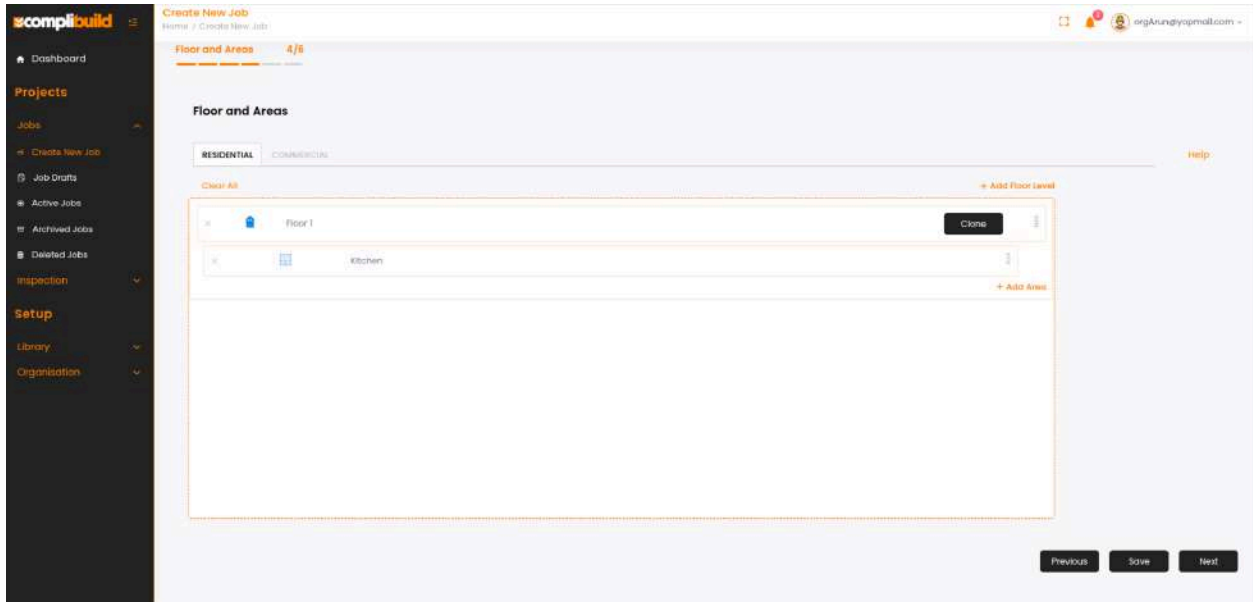
- Floor Levels
- Areas within each floor

System Behavior:

- Creates a hierarchical structure:
 - Job → Floors → Areas
- Prepares the system for granular task allocation

Outcome:

A clear execution structure is established.



Step 5: Checklist Configuration

This step prepares execution guidelines for teams.

Key Inputs:

- Checklist Name
- Sections and Items
- Option to upload or reuse templates

Advanced Capabilities:

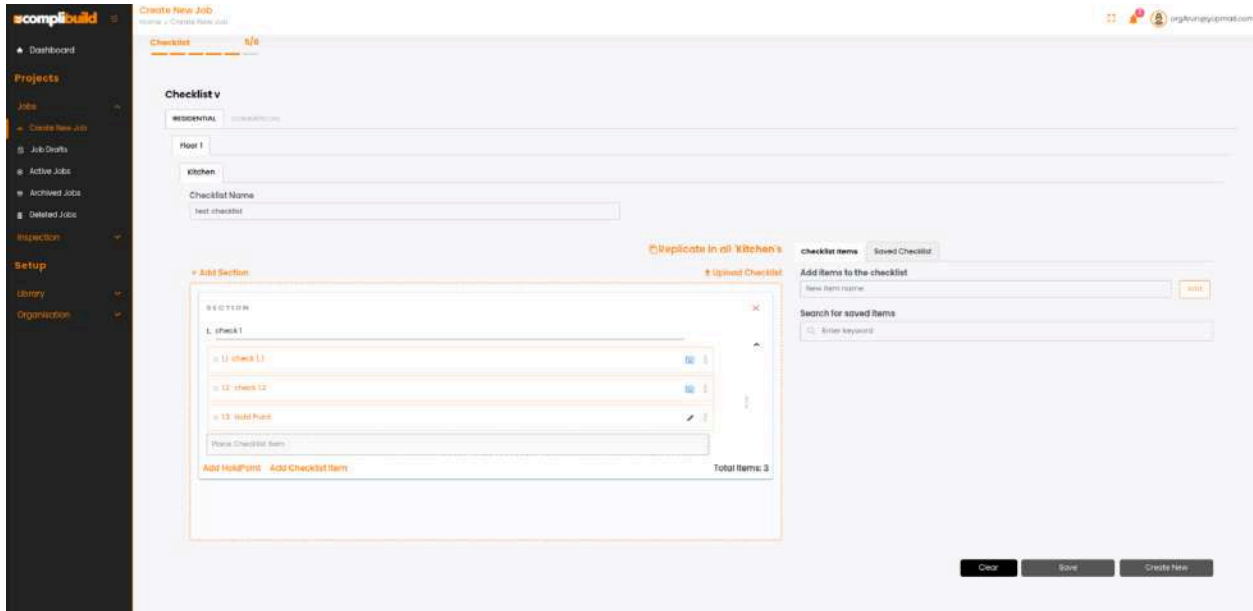
- Replicate checklist across multiple areas
- Use saved checklist templates

System Behavior:

- Maps checklist to defined floors and areas
- Stores reusable checklist configurations

Outcome:

Standardized execution and inspection criteria are defined.



Step 6: Finalisation

The final step ensures completeness before activation.

User Actions:

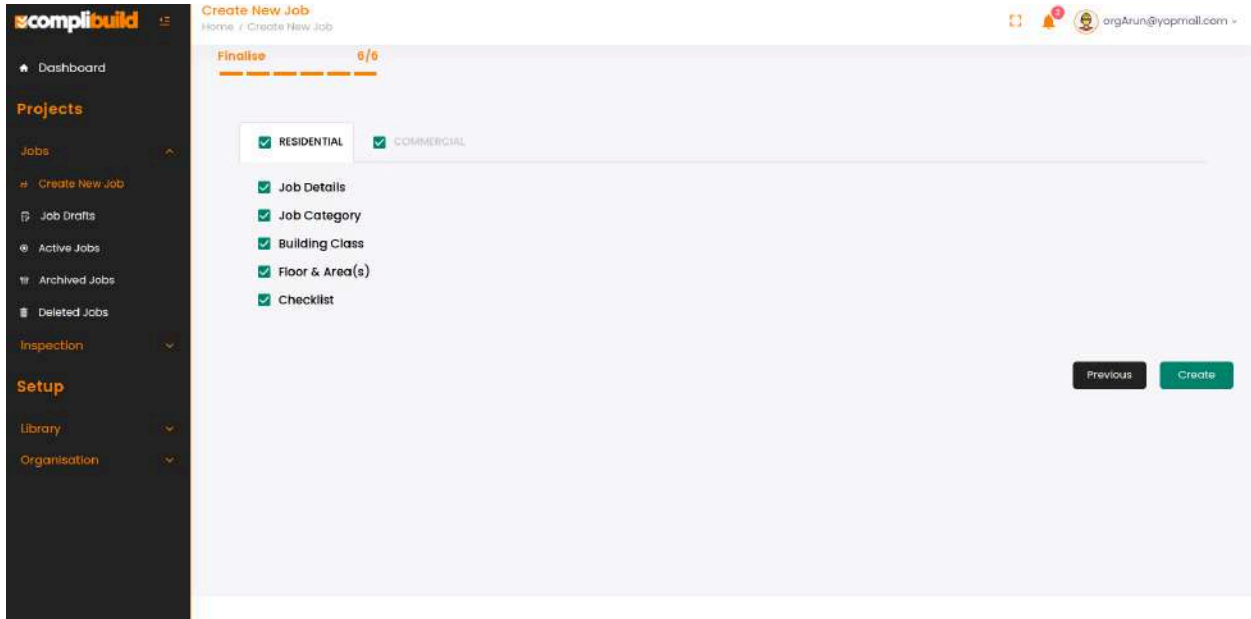
- Review all entered data
- Confirm job creation

System Behavior:

- Performs full validation
- Transitions job state from:
 - *Draft* → *Active*
- Prepares job for assignment and execution

Outcome:

The job becomes active and ready for team collaboration.



5. Key Design Decisions

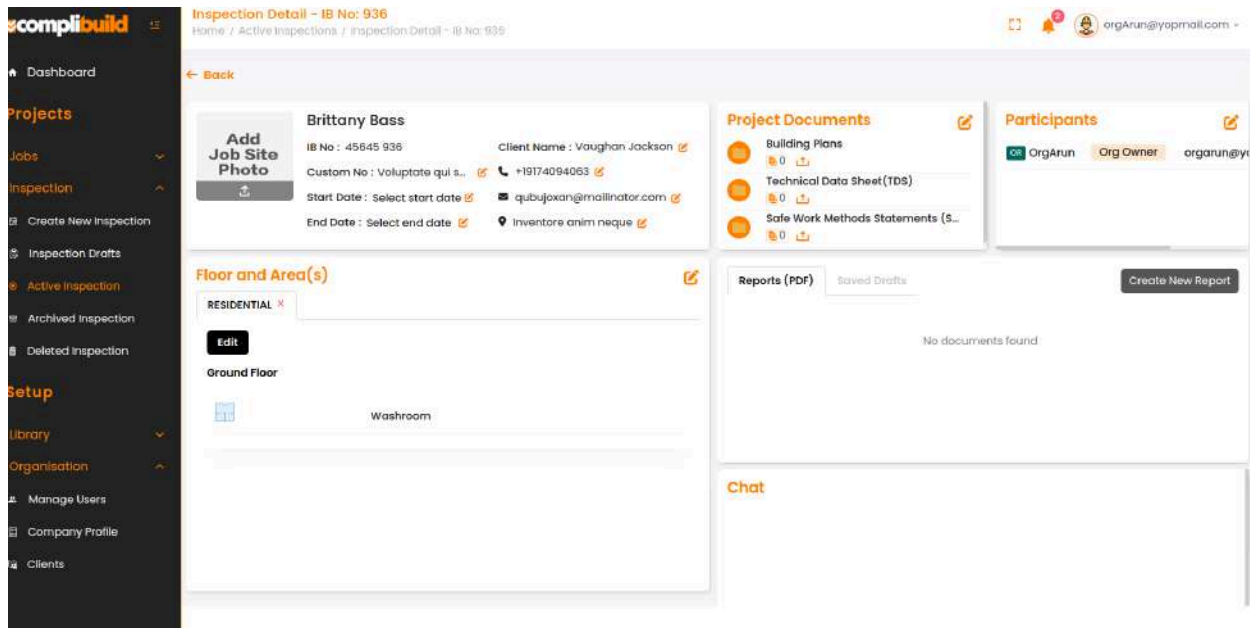
- **Multi-step Wizard Approach:**
Reduces user overwhelm and ensures structured data capture
- **Hierarchical Data Modeling:**
Enables scalability for complex real estate projects
- **Template-Driven Checklist System:**
Promotes consistency and operational efficiency
- **Conditional Workflow Logic:**
Adapts system behavior based on job category and inputs

5.3 Inspection Management Module

Key Features:

- Multi-step Inspection creation workflow
- Assign multiple team members to a job

- Track job progress and status
- Centralized job listing



1. Background

In real estate operations, inspections are critical for validating work quality, ensuring compliance, and maintaining documentation across projects.

However, traditional inspection processes often suffer from:

- Lack of standardized checklists
- Poor traceability
- Inconsistent data capture across sites

To address this, the platform introduces a **structured, checklist-driven inspection workflow**, aligned with the job creation system.

2. Objective

Design a **scalable and standardized inspection system** that:

- Ensures consistent inspection processes
 - Enables field teams to perform structured assessments
 - Links inspections directly to job execution
 - Captures detailed, actionable insights
-

3. Solution Approach

A **6-step guided inspection creation workflow** was implemented, mirroring the job creation journey for consistency and ease of use.

This allows users to quickly adapt while maintaining structured data capture.

4. Inspection Creation Workflow

Step 1: Inspection Details

This step captures the core information related to the inspection.

Key Inputs:

- Inspection Name (*mandatory*)
- Custom Inspection Number (optional)
- Client Details (Name, Email, Phone)
- Site Address
- Linked Job (if applicable)

System Behavior:

- Validates required fields
- Supports address auto-fill
- Enables linking inspection to an existing job

Outcome:

A draft inspection entity is created.

The screenshot shows the 'Create New Inspection' form in the CompliBuild system. The form is titled 'Inspection Details' and is part of a 7-step process (1/7). The form is divided into two columns and contains the following fields:

- Custom Job no.:** A text input field with the placeholder 'Enter custom job no.'
- Client Name:** A text input field with the placeholder 'Enter client name.'
- Job Name *:** A text input field with the placeholder 'Enter job name'.
- Client Email:** A text input field with the placeholder 'Enter client email'.
- Job Phone Number:** A text input field with a dropdown menu for the country code (currently set to '+61') and a placeholder 'Phone'.
- Client Phone Number:** A text input field with a dropdown menu for the country code (currently set to '+61') and a placeholder 'Phone'.
- Site Address:** A text input field with the placeholder 'Search address ---'.
- Client Address:** A text input field with the placeholder 'Search address ---' and a checkbox labeled 'Same as Site Address'.

At the bottom right of the form, there are three buttons: 'Save', 'Next', and 'Quick Create'.

Step 2: Inspection Category

This step defines the nature of the inspection.

Options:

- Residential
- Commercial
- Infrastructure

Each includes:

- New Construction
- Renovation
- Remediation

System Behavior:

- Tags inspection with category metadata

- Enables context-specific checklist suggestions

Outcome:

Inspection classification is established.

The screenshot shows the 'Create New Inspection' interface. The sidebar on the left includes 'Dashboard', 'Projects', 'Jobs', 'Inspection', and 'Setup'. The main area is titled 'Create New Inspection' and 'Inspection Category 2/7'. It prompts the user to 'Select the appropriate job category' and displays three columns: 'RESIDENTIAL', 'COMMERCIAL', and 'INFRASTRUCTURE'. Each column has three radio button options: 'New construction', 'Renovation', and 'Remediation'. At the bottom right, there are 'Previous', 'Save', and 'Next' buttons.

Step 3: Building Class

Ensures inspection aligns with property classification standards.

Key Inputs:

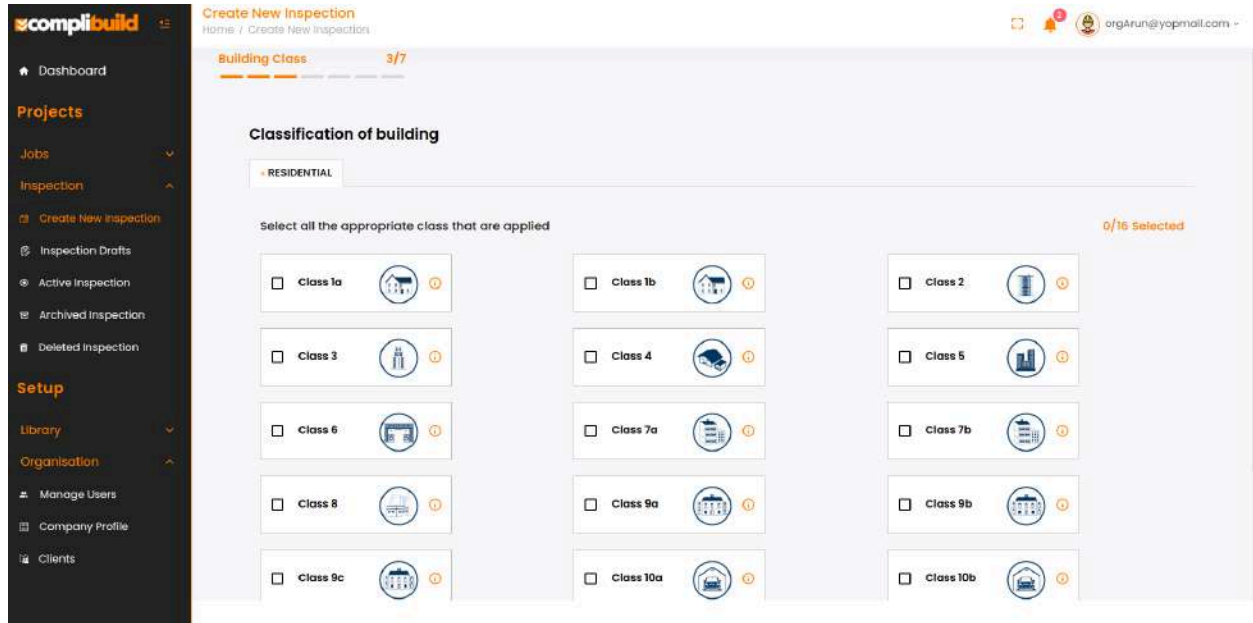
- Multi-select building classes (Class 1a to Class 10c)

System Behavior:

- Stores classification for compliance and reporting
- Aligns inspection criteria with building standards

Outcome:

Inspection is mapped to regulatory classifications.



Step 4: Floor & Areas Mapping

Defines where the inspection will take place.

Key Inputs:

- Floor Levels
- Areas within floors

System Behavior:

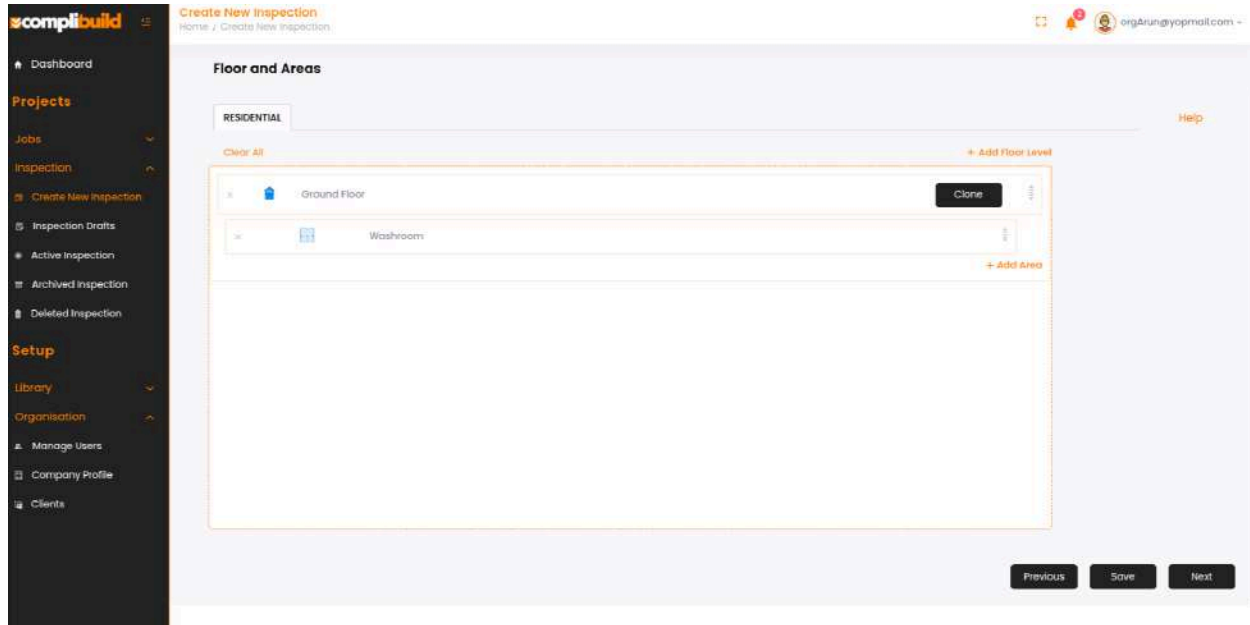
- Maps inspection scope to:

Inspection → Floors → Areas

- Enables granular inspection tracking

Outcome:

Inspection scope is clearly structured.



Step 5: Checklist Configuration

This is the core of the inspection workflow.

Key Inputs:

- Checklist Name
- Sections and Items
- Upload or reuse templates

Advanced Features:

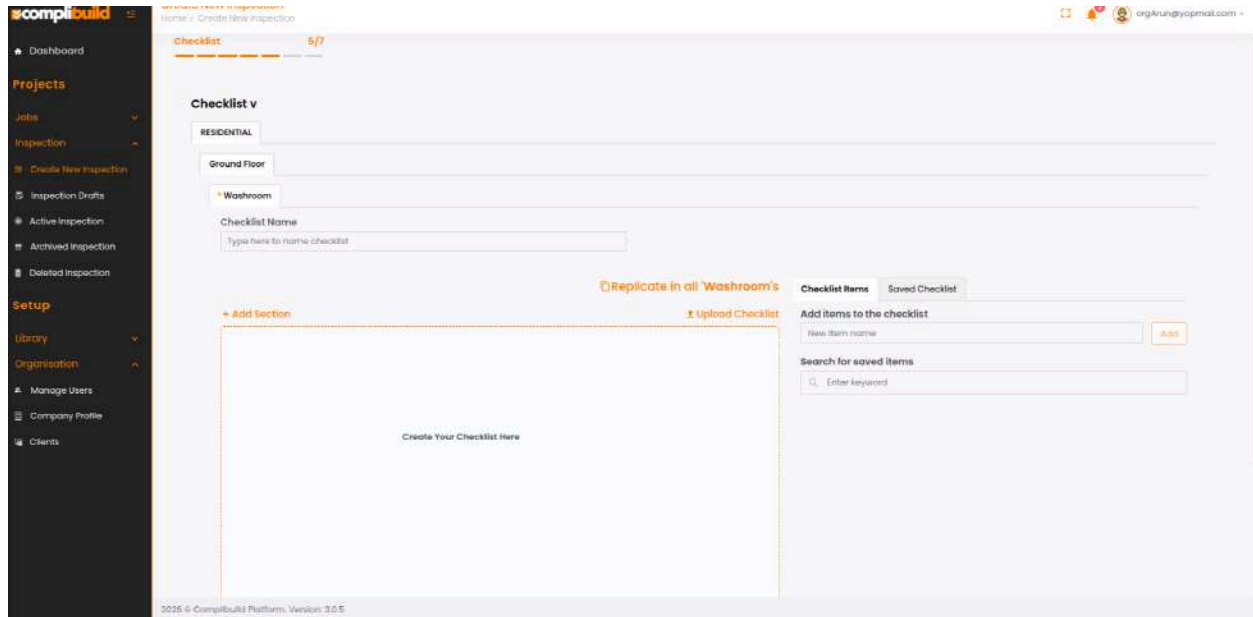
- Replicate checklist across areas
- Use saved checklist templates

System Behavior:

- Associates checklist with floors and areas
- Ensures consistent inspection execution

Outcome:

The inspection checklist is fully configured.



Step 6: Finalisation

Final review before activating the inspection.

User Actions:

- Review all details
- Confirm inspection creation

System Behavior:

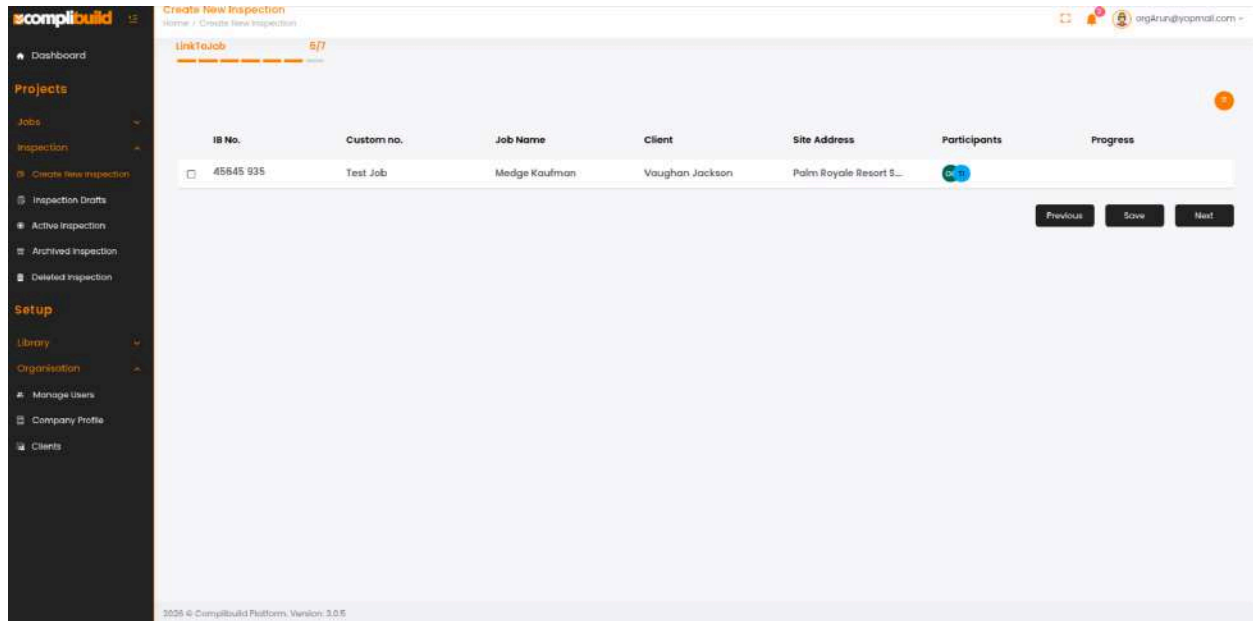
- Validates all steps
- Changes state:

Draft → Active

- Prepares inspection for execution

Outcome:

Inspection is ready for field teams.



5. Key Design Decisions

- **Unified Workflow with Jobs:**
Reduces learning curve and improves usability
- **Checklist-Driven Inspections:**
Ensures consistency and accuracy in field operations
- **Hierarchical Mapping (Floors & Areas):**
Enables detailed inspection coverage
- **Template Reusability:**
Improves efficiency and scalability

6. Integration with Jobs

- Inspections can be:
 - Linked to specific jobs
 - Created independently
- Shared structure (Floors, Areas, Checklists) ensures:
 - Seamless data flow

- Unified reporting
- Better traceability

The screenshot shows the 'Create New Inspection' page in the CompliBuild system. The page is titled 'Create New Inspection' and has a breadcrumb trail 'Home / Create New Inspection'. The user is logged in as 'orgArun@yopmail.com'. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: Dashboard, Projects (Jobs, Inspection, Create New Inspection, Inspection Drafts, Active Inspection, Archived Inspection, Deleted Inspection), Setup (Library, Organisation, Manage Users, Company Profile, Clients). The main content area is titled 'Link to Job' and shows a table with the following data:

IB No.	Custom no.	Job Name	Client	Site Address	Participants	Progress
45645 935	Test Job	Medge Kaufman	Vaughan Jackson	Palm Royale Resort S...		

At the bottom right of the table, there are three buttons: 'Previous', 'Save', and 'Next'.

The screenshot shows the 'Create New Inspection' page in the CompliBuild system, now at the 'Finalise' step 7/7. The page is titled 'Create New Inspection' and has a breadcrumb trail 'Home / Create New Inspection'. The user is logged in as 'orgArun@yopmail.com'. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: Dashboard, Projects (Jobs, Inspection, Create New Inspection, Inspection Drafts, Active Inspection, Archived Inspection, Deleted Inspection), Setup (Library, Organisation, Manage Users, Company Profile, Clients). The main content area is titled 'Finalise' and shows a list of items to be finalized:

- RESIDENTIAL
- Inspection Details
- Inspection Category
- Building Class
- Floor & Area(s)
- Checklist
- Link Jobs

At the bottom right of the list, there are two buttons: 'Previous' and 'Create'.

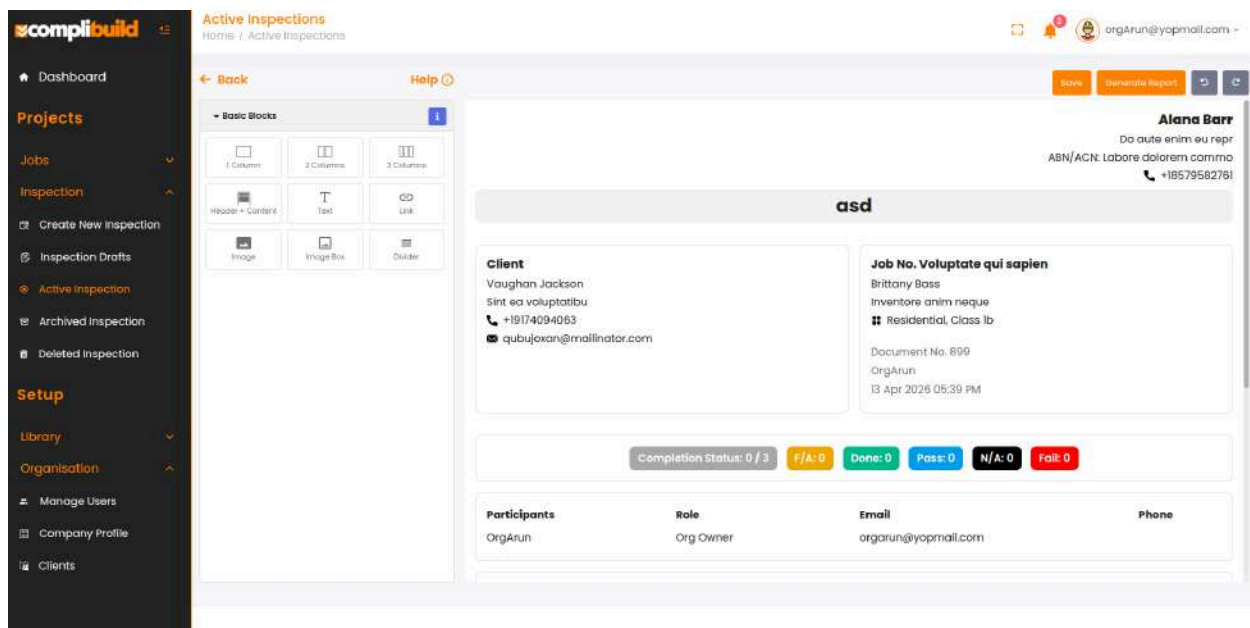
2026 © CompliBuild Platform, Version: 3.0.5

6. Task Execution

Once a job or inspection is created, assigned team members perform structured execution.

6.1 Area & Structure Definition

- Properties are divided into:
 - Floors
 - Areas (e.g., rooms, sections)



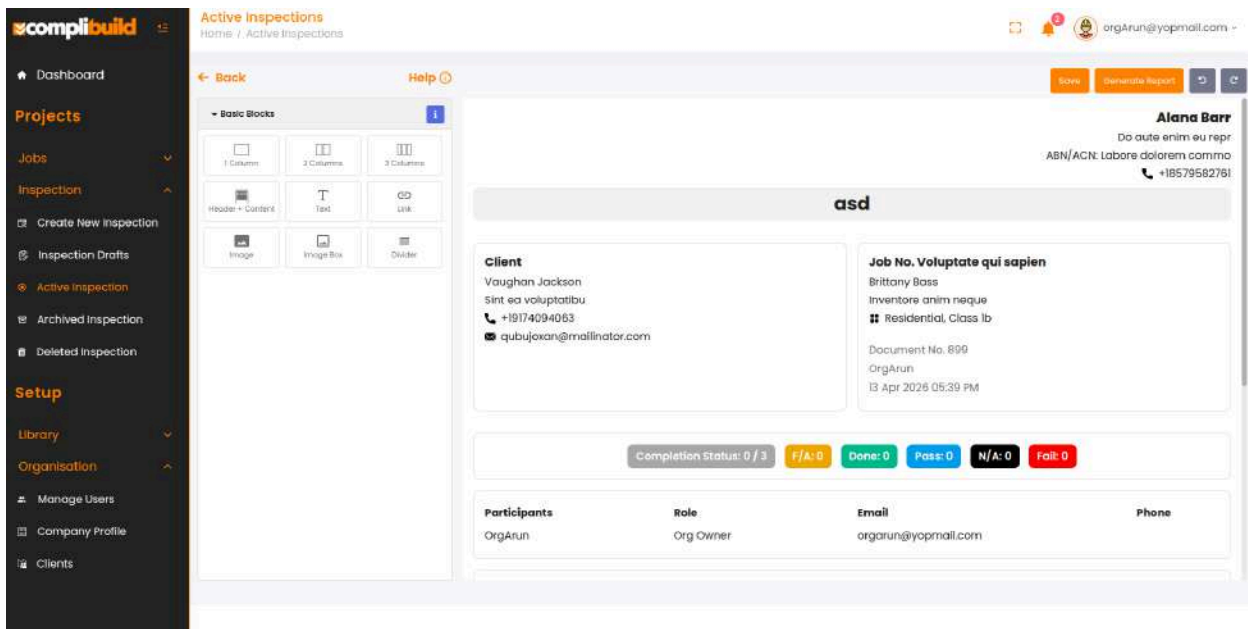
6.2 Checklist-Based Execution

Each area contains predefined checklist items.

Actions available to users:

- Update status:
 - Done
 - Pass

- Fail
- Fix Required (F/A)
- Not Applicable (N/A)
- Add:
 - Notes
 - Photos
 - Attachments
- Perform:
 - Digital sign-off



6.3 Real-Time Progress Tracking

- Completion status tracking
- Status distribution (Done, Fail, etc.)
- Live visibility for admins and stakeholders

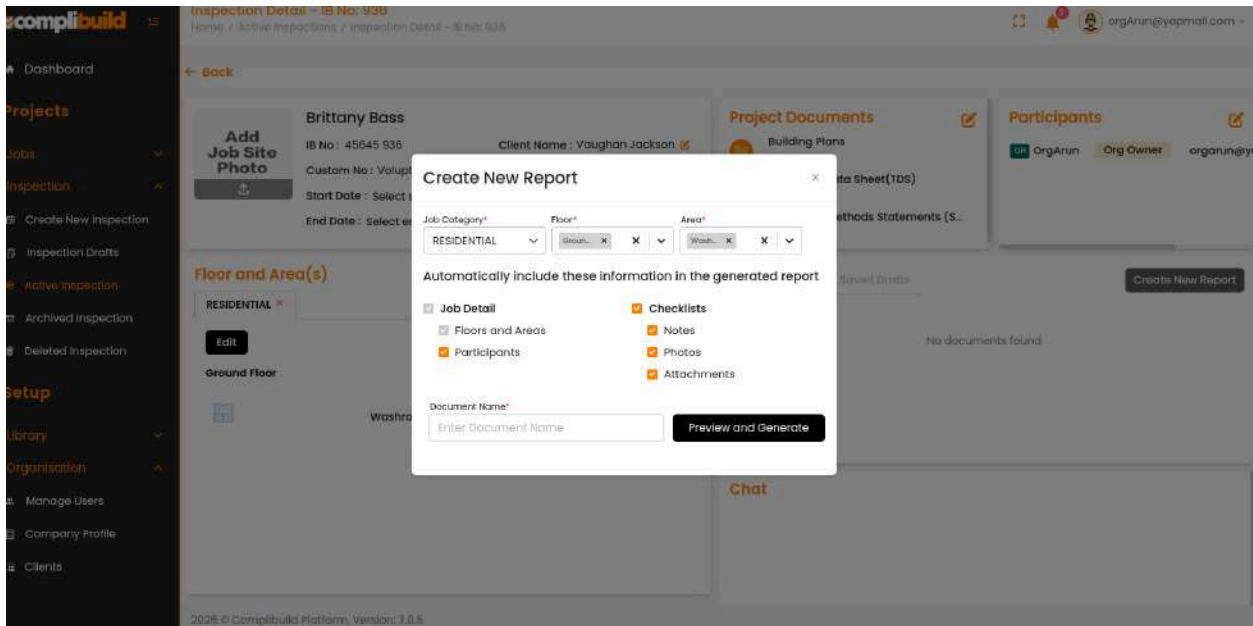
7. Report Generation Module

The platform provides a **dynamic and configurable reporting system** for both jobs and inspections.

7.1 Report Configuration

Users can define:

- Job category
- Floors and areas
- Document name



7.2 Selectable Data Inclusion

Reports can include:

- Job details
 - Participants
 - Floors & areas
 - Checklists
 - Notes
 - Photos
 - Attachments
-

7.3 Output & Storage

- Preview before generation
- Export as PDF
- Stored under report repository
- Shareable with clients and stakeholders

The screenshot displays the 'Active Inspections' page in the CompliBuild application. The left sidebar contains navigation options: Dashboard, Projects, Jobs, Inspection, Create New Inspection, Inspection Drafts, Active Inspection, Archived Inspection, Deleted Inspection, Setup, Library, Organisation, Manage Users, Company Profile, and Clients. The main content area shows a report for 'Alana Barr' with the following details:

- Client:** Vaughan Jackson, Sint ea voluptatibu, +19174094063, qubujoxan@mailinator.com
- Job No. Voluptate qui sapien:** Brittany Bass, Inventore anim neque, Residential, Class 1b, Document No. 899, OrgArun, 13 Apr 2026 05:39 PM
- Completion Status:** 0 / 3 (F/A: 0, Done: 0, Pass: 0, N/A: 0, Fail: 0)
- Participants Table:**

Participants	Role	Email	Phone
OrgArun	Org Owner	orgarun@yopmail.com	

This is a duplicate of the screenshot above, showing the same 'Active Inspections' page in the CompliBuild application. The interface and data presented are identical to the first screenshot.

8. End-to-End Workflow

Signup → Admin Approval → Subscription Activation
→ Organization Setup → Team Onboarding
→ Job/Inspection Creation → Assignment
→ Task Execution (Checklist + Media Updates)
→ Progress Tracking → Report Generation
→ Final Documentation

9. Technical Considerations

- **Architecture:** Multi-tenant SaaS
 - **Auth:** JWT / Session-based with RBAC
 - **Database:** Firestore, MongoDB, mySql
 - **Scalability:** Modular services for jobs & inspections
 - **Security:** Access control at API + UI level
-