



UI/UX DESIGN DOCUMENT

Luxury Realty Lead Qualification + Broker Dashboard (Catalog #6)

KnightRoad Veritas AI Platforms · Dominic R. Nottage · July 2026 · v1.0

PRODUCT

Veritas Luxury Realty
Agents

AUDIENCE

Brokers / Ops / Principals

BASELINE

Qualification + Dashboard

1. Purpose & Scope

This design document defines the user experience for Catalog #6 — a lean UHNW inquiry qualification pilot with broker command dashboard, expandable via logistics, tax/residency advisory, and post-sale concierge module add-ons. Screen mockups reflect the Veritas AI BIPLATFORMS suite scoped for Bahamas Sotheby's International Realty.

- In scope (base):** UHNW intent scoring UI, broker command dashboard, training/handoff presentation.
- In scope (add-on mockups):** Cross-island logistics map, advisory chat, post-sale concierge board.
- Out of scope:** Full CRM replacement, custom mobile apps, headset/hardware procurement.

2. Design Principles

- **Broker time first** — escalate only verified high-intent buyers; tourists get automated nurture.
- **Command clarity** — KPIs and autonomous actions are scannable in under 10 seconds.
- **Module honesty** — base vs add-on capabilities are labeled so buyers know what they purchased.
- **Jurisdiction trust** — advisory answers cite thresholds (VAT, residency) and offer checklist generation.

3. Brand & Visual System

Color palette

#16335B

Navy

#1E4A82

Navy 2

#5EA233

Green

#EEF3F8

Sky

#8B939B

Gray

#0F2744

Ink

DISPLAY

Montserrat Bold

Headings, badges, KPI numbers

BODY

Open Sans / Inter

UI copy, chat, tables, forms

4. Deliverable & Module Map

#	Screen / Module	Tier	User goal
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1	Executive Command Dashboard	Included	See leads, itineraries, actions at a glance
2	UHNW Qualification Engine	Included	Score intent; escalate or auto-nurture
3	Cross-Island Logistics	Add-on	Plan multi-leg tours; weather reroutes
4	Tax & Residency Advisory	Add-on	Answer VAT / EPR questions; checklists
5	Post-Sale Concierge	Add-on	Track turnkey post-close workflows

5. Screen Mockups

5.1 Executive Command Dashboard

INCLUDED

VERITAS AGENT
Sotheby's · Nassau HQ

Dashboard

Logistics & Routing

Client Intel

Advisory Agent

Concierge Services

Executive Command Dashboard Live

Global Overview · Nassau, Bahamas HQ

ACTIVE HIGH-INTENT LEADS
14
↑ 3 escalated today

LOGISTICS ITINERARIES
5
2 Exuma · 3 Eleuthera

ACTIVE AI CONCIERGES
8
Managing 8 properties

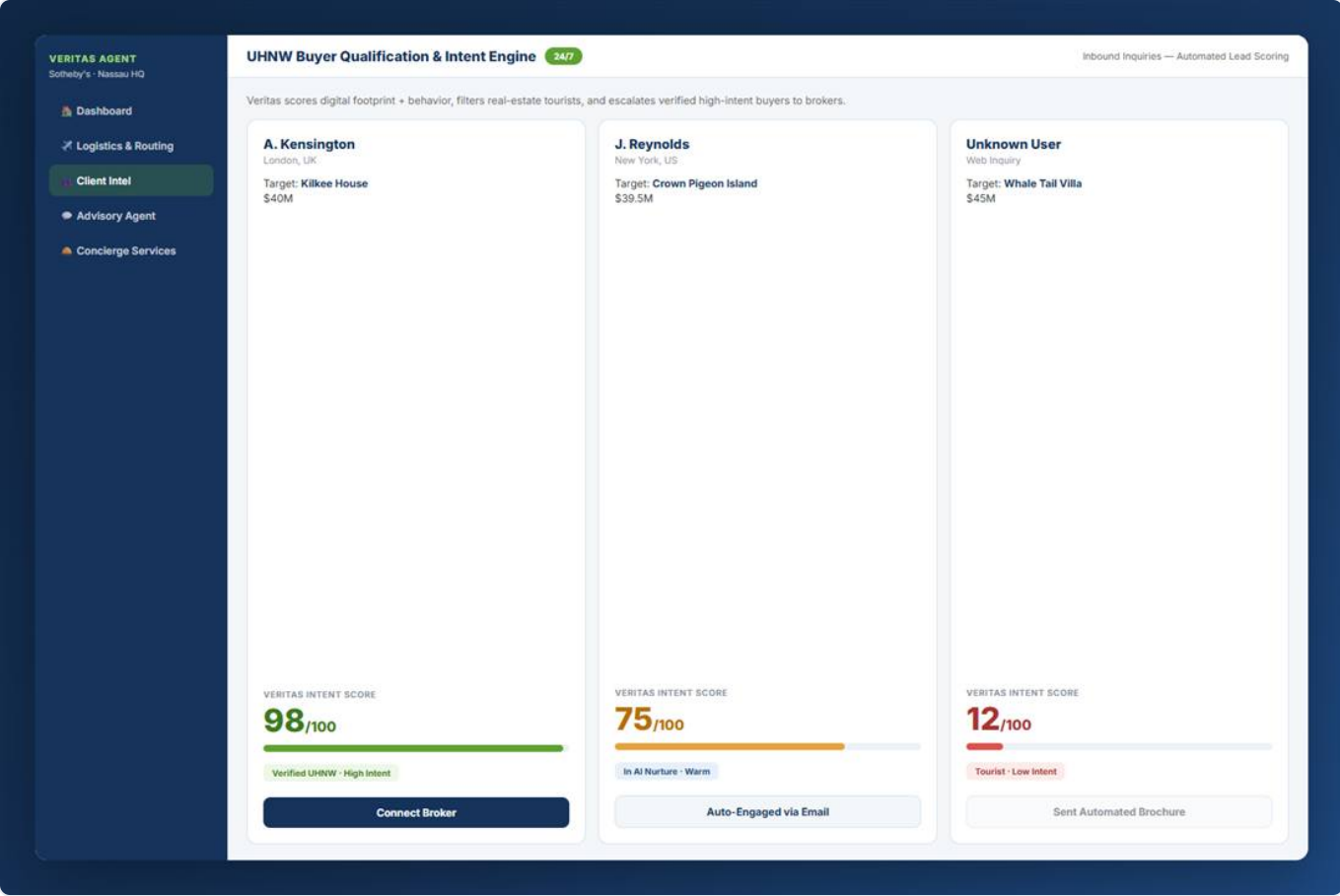
AVG. INQUIRY RESPONSE
12s
↓ Down from 4 hrs

Recent Autonomous Actions

Agents online

TIME	AGENT SYSTEM	ACTION TAKEN	STATUS
10:42 AM	Advisory Agent	Sent Residency Application Checklist to UAE Client	Completed
09:15 AM	Client Intel	Qualified inquiry for Kilkee House (Score: 94)	Broker Alerted
08:30 AM	Logistics	Rerouted flight to North Eleuthera due to weather	Adjusted
08:05 AM	Client Intel	Filtered low-intent web inquiry — Whale Tail Villa	Auto Brochure
07:40 AM	Concierge	Confirmed yacht slip registration — Paradise Island	Completed

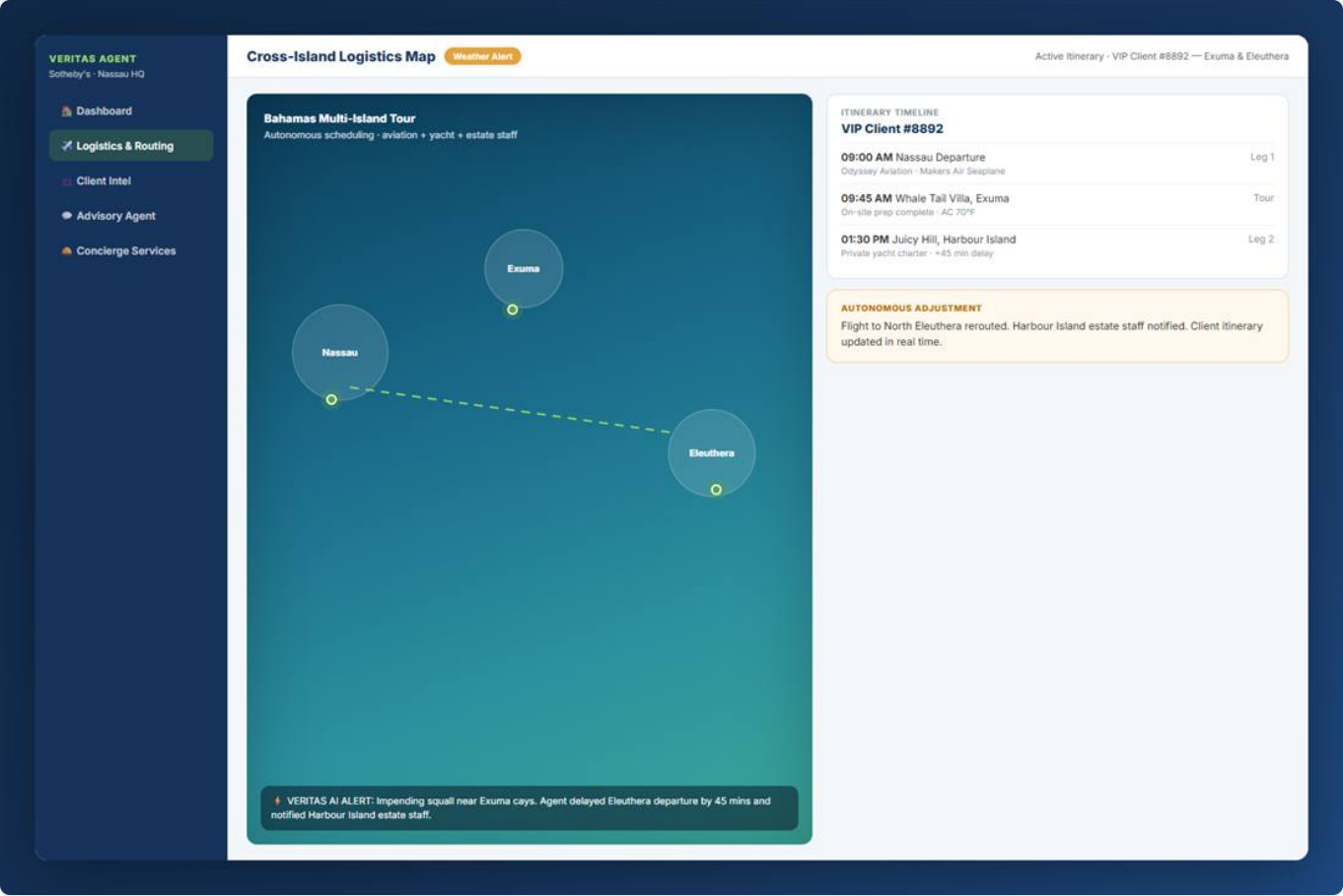
UX notes: Left nav for Dashboard / Logistics / Client Intel / Advisory / Concierge. KPI strip (high-intent leads, itineraries, concierges, avg response). Autonomous actions table with status pills.



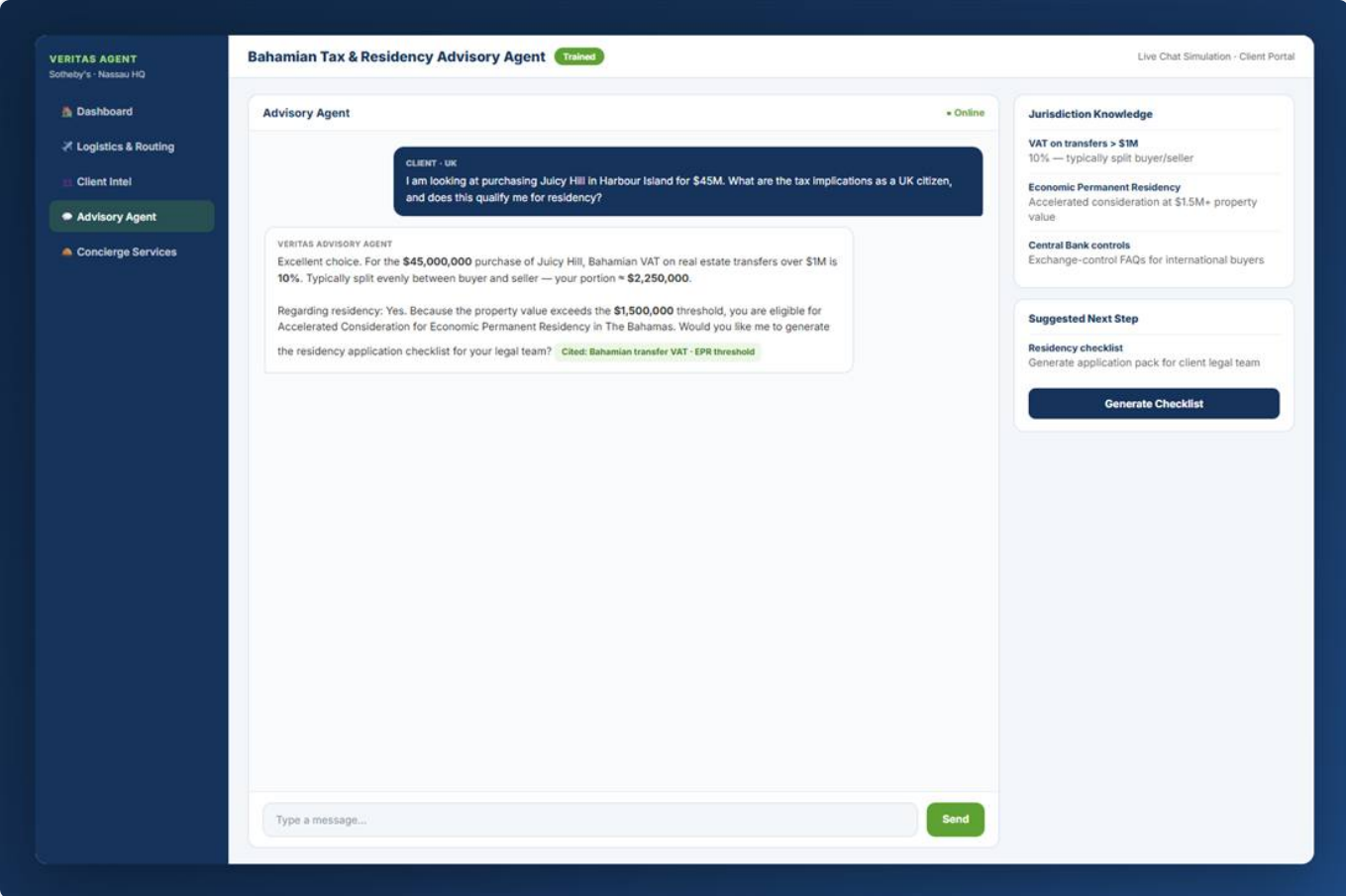
UX notes: Lead cards show intent score (0–100), property target, and action (Connect Broker / AI Nurture / Auto Brochure). Color + text convey High / Warm / Low — never color alone.

5.3 Cross-Island Logistics Map

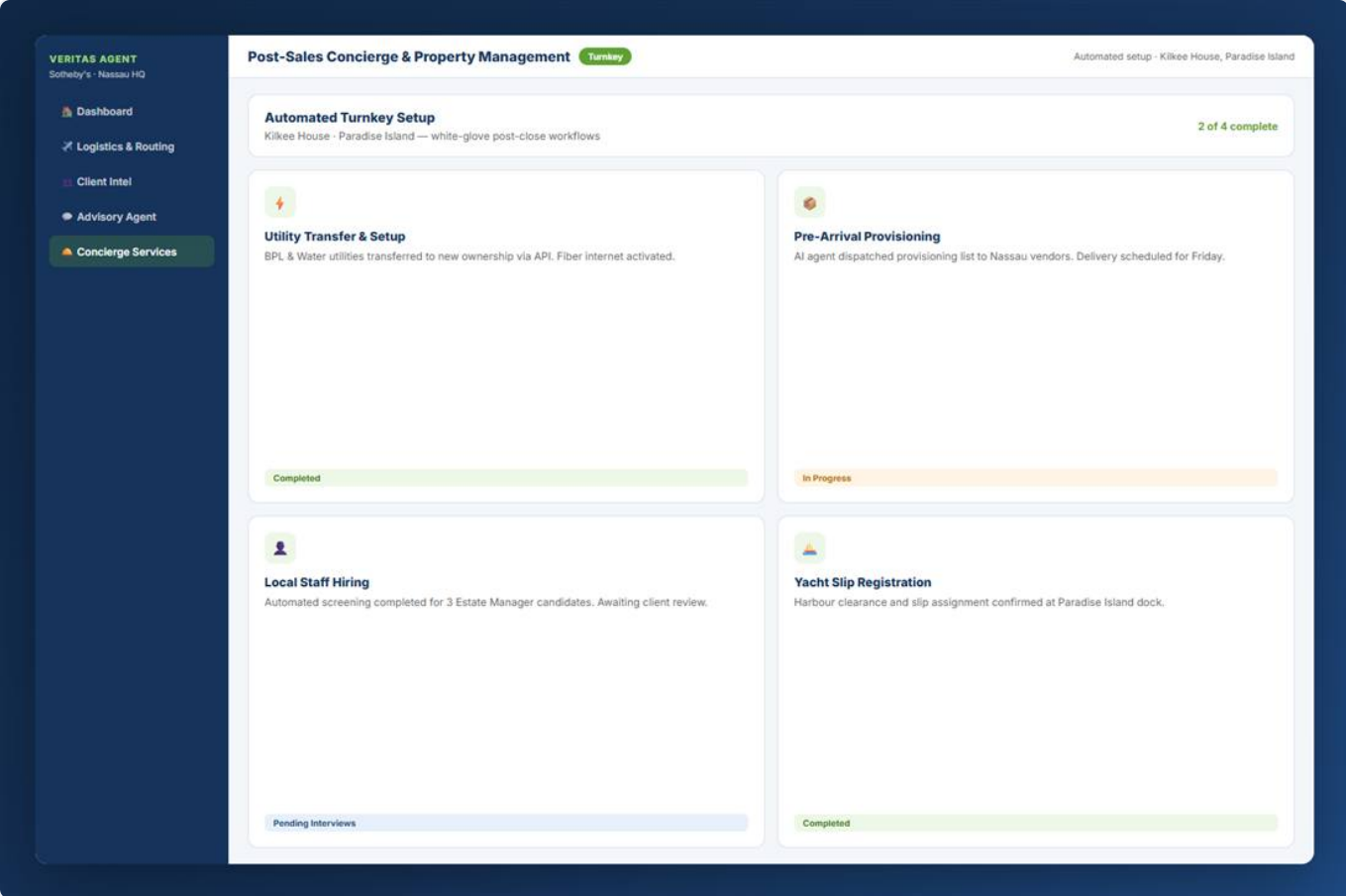
ADD-ON



UX notes: Map + itinerary timeline for multi-island tours. Weather alert banner shows autonomous delay and estate-staff notification. Legs labeled (aviation / yacht / tour).



UX notes: Client chat with citation chips (VAT %, EPR threshold). Side panel lists jurisdiction facts and “Generate Checklist” CTA for legal teams.



UX notes: Turnkey board for utilities, provisioning, staffing, marina. Status pills: Completed / In Progress / Pending. Progress summary (e.g. 2 of 4 complete).

6. Information Architecture

Area	Primary users	Key actions
Dashboard	Brokers, principals	Scan KPIs, review autonomous actions
Client Intel	Brokers, ops	Review scores, connect / nurture / filter
Logistics	Ops, estate staff	Build itineraries, accept reroutes
Advisory	Buyers (portal), brokers	Ask jurisdiction Qs, generate checklists
Concierge	Ops, vendors	Track post-close tasks to ready

7. Accessibility & States

- Intent and workflow status use text + color (High / Warm / Low; Completed / In Progress / Pending).
- Primary actions use navy/green with contrast on white and dark chrome.
- Weather and broker-alert states must interrupt the dashboard — no silent failure.

- Add-on modules remain visible in nav but gated/labeled when not purchased.

8. Project Cover (Catalog Listing)

Catalog #6 cover image

GALLERY



Catalog #6

Luxury Realty - UHNW Brokerage Pilot

Powered by KnightRoad Veritas

LEAD QUALIFICATION + BROKER DASHBOARD

Autonomous agents for luxury & multi-island realty

Base pilot: UHNW inquiry scoring + command dashboard. Expand with logistics, tax/residency advisory, and post-sale concierge add-ons.

1

UHNW Qualification Engine
24/7 intent scoring, tourist filtering, broker escalation
Included

2

Executive Command Dashboard
High-intent leads, response metrics, autonomous actions
Included

3

Cross-Island Logistics
Multi-leg itineraries with weather-aware rerouting
Add-on

4

Tax & Residency Advisory
Jurisdiction FAQs + residency checklist generation
Add-on

5

Post-Sale Concierge
Utilities, provisioning, staffing, marina workflows
Add-on

6

Training & Handoff
Live recorded training + written ops handoff docs
Included

Veritas AI BIPLATFORMS · Bahamas Sotheby's International Realty scoped suite

Tiers: \$4.5K \$7.5K \$11K

1536×1024 Upwork-safe cover listing included deliverables and add-on modules with Veritas branding and tier price anchors.