ANTILLIA / REALTOR OPERATING GUIDE

Make your AI Chief of Staff work for you

Step-by-step instructions for getting useful reports, prepared follow-ups and a manageable approval queue.

The Caribbean, verified. • Prepared 18 October 2026

AI does the groundwork. You remain in control.

Keep your office records current, let the Chief of Staff prepare the work, then review the facts and approve decisions. Buyer messages are not automatically sent. New listings do not become active simply because the AI has analysed them.

01 Open your Realtor desk

Go to antillia.online/realtor and sign in with your own verified Realtor account. You can also select **Your desk** on the website. Look for the **AI Chief of Staff** panel.

Check: Your office name, Today’s Brief, Approval inbox and Tasks & Follow-ups are visible. If access is unavailable, ask the Antillia office administrator to verify your Realtor account.

02 Confirm scheduled reporting and delivery

Ask the office administrator to confirm that your daily brief is enabled, your reporting time is set, and the hourly scheduled check is operating. If you want email delivery, ask them to confirm whether your individual account is supported and explicitly configured.

Check: Get confirmation of the time zone and recipient. There is no schedule or email-settings control on the current Realtor desk.

Edward’s reporting arrangement

Edward’s last-confirmed setup is **7 a.m. Saint Lucia time (11:00 UTC)**. His morning email is individually configured. That arrangement does not automatically apply to every Realtor. This guide does not certify a fresh email delivery.

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02 / GIVE THE AI RELIABLE INPUTS

Record the work you want reported

03 Maintain your buyer enquiries

In **Leads & CRM**, review enquiries assigned to you. Record the buyer's contact details, budget and currency, buying timeline, destination, property preferences and useful conversation notes wherever the form allows. Update the lead's stage as it moves from new to contacted, qualified, viewing, offer, closed or lost. Save your notes.

Check: The enquiry appears in your desk under your account. A lead assigned to another Realtor is not part of your private report.

04 Create dated follow-ups

Under **Tasks & Follow-ups**, choose Call, Viewing, Email or Other. Enter a title and **Follow-up due time**, select the related lead when available, add notes, and press **Add follow-up**.

Check: The task appears with the correct due date and time. Undated tasks cannot reliably appear in deadline-based summaries.

05 Add appointments separately

Under **Calendar**, choose the event type, enter the date/time and title, add a location and related lead if useful, then press **Add event**. A calendar appointment records when you will meet; a follow-up task records work that must be completed.

Check: The event appears in the Calendar. Check your device's local time zone before entering a time.

06 Keep listing information accurate

In **Listings**, open the property title to inspect its detail page. Use **Edit** for desk fields or **Edit Listing Details** on the detail page where available. Save accurate price and currency, location, description, property type, beds, baths, square footage, lot size, features and any Special Note. Add supporting evidence and appropriate listing photos.

Check: Open the saved listing again and confirm the changes. Unknown facts must remain unknown; never enter estimates as verified measurements.

07 Record actual money received or spent

Open your private accounting page at antillia.online/realtor/accounting. Record commissions, other income and expenses with the correct date, currency and amount; press **Save entry**.

Check: Your P&L changes only when a financial entry is recorded. An enquiry, viewing, offer or commission-calculator estimate does not create income.

03 / START WORK AND APPROVE DECISIONS

Trigger the Chief of Staff

08 Prepare a brief immediately

At the top of the AI Chief of Staff panel, press **Refresh Brief**. Wait while the button reads **Writing brief…**. Read the saved result under **Today's Brief**. Use this after you have updated your office records.

Check: The "Written" time changes and the report reflects the records you just saved. This updates the desk report; it does not guarantee a new email.

09 Process new listings and enquiries

In **Approval inbox**, press **Run autopilot now**, or wait for the hourly scheduled check. Eligible new pending listings receive prepared investment analysis. Recent, assigned, unscored leads receive scoring, suggested properties and a prepared reply.

Check: Look for prepared items in the inbox. "All clear" may mean there were no eligible records, not that the service failed.

10 Review each listing analysis

Read the score, summary and risks; check them against the property's evidence. If the listing is pending and you accept the result, choose **Approve & make active**. For an already-active listing's queued analysis, choose **Approve & publish analysis**. Choose **Reject** if the result is unsuitable. Correct source details before requesting another review.

Check: Open the public detail page after approval to confirm the intended result. Missing rental or cost evidence can leave projected IRR unavailable; that is not permission to invent it.

11 Review a prepared buyer reply

Check the buyer's name, preferences, matched properties and every claim. Edit the reply in the inbox. Choose **Approve & open email** when ready, then review the email compose window and send it yourself. Choose **Reject** if unsuitable.

Check: Approval is not proof of sending. Check your email application's Sent folder. If no recipient email or email application is available, copy your approved wording into your chosen communication channel.

What the hourly check does not do

It does not automatically reanalyse every active listing or rescore every scored lead. Each pass is bounded: up to **3 listings, 3 unscored leads and 5 daily briefs**. Busy queues can carry over to later passes. Repeatedly pressing Run autopilot now while it is already running will not speed it up.

04 / TURN PREPARATION INTO ACTION

Follow-ups, scores and voice

12 Score an unscored lead

Use **Score [lead name]** in the Chief of Staff panel if the enquiry has not yet been scored. Read the score, reasoning and recommended next action under **Top Priority Leads**.

Check: Scores run from 1 to 100. A score **above 80** creates a high-priority task due in four hours; a score of exactly 80 does not trigger that rule. A score is guidance, not a guarantee of purchase.

13 Draft your next communication

On the relevant follow-up task, press **Draft with AI**. Review and edit the result, then choose **Copy draft**. Use it in your email, message or call workflow. For the best result, link the task to its lead and provide useful notes first.

Check: Call follow-ups prepare a call script; viewing follow-ups prepare a confirmation; other task types use the email-style draft in the current desk. Drafting does not send anything.

14 Record outcomes and completion

After the call, viewing or email, record what happened in the task's notes and press **Save notes**. Set the status to Pending, In progress or Completed, or use the check control to complete the task. Add a new dated follow-up if another action is needed.

Check: Completed tasks no longer appear as pending work. Use **Show completed** to review them; reopen a task if necessary. Update the lead's stage in Leads & CRM as well.

15 Ask questions by typing or speaking

Under **Ask your Chief of Staff**, type a question and press **Ask**, or use the microphone control and allow microphone access. In supported browsers, the spoken question is submitted and the answer is read aloud. Use the stop-listening control when finished.

Check: If the microphone is unavailable or permission is denied, type instead. Check device volume for spoken answers; browser support varies.

Useful questions

- "What is most urgent in my office today?"
- "Which leads should I contact first, and why?"
- "Which follow-ups are overdue?"
- "What appointments do I have today?"

Voice answers are not completed actions

The current voice tool answers questions using your office data. Asking it to book, send or change something does **not** actually complete that action. Use the calendar, task, approval and communication controls, and confirm the saved result yourself.

05 / MAKE SURE THE REPORT DELIVERS

Read the brief and confirm receipt

16 Check the report, then act

Read **Today's Brief** and its "Written" time. Compare urgent items with your actual task and calendar records. Prioritise your day, complete the actions, then record outcomes. When email reporting is configured, separately check your inbox and spam/junk folder.

Check: A saved brief in the desk and an email delivered to your inbox are two different confirmations. A report saved successfully can still have an email-delivery problem.

Report includes	What you must maintain
Priority buyers	The top five recently scored leads, their qualification facts, reasoning and next actions.
Urgent work	Dated pending/in-progress tasks, overdue follow-ups and work due in the next 48 hours.
Appointments	Saved calendar events for today and the upcoming reporting window.
Pipeline and listings	Current lead stages and office-assigned listing records, including approval status.
Month-to-date finances	Actual recorded income and expenses, grouped separately by currency. No guessed currency conversion.

How scheduled delivery works

The scheduled check runs hourly. Once your configured reporting time has passed, it can create your day's brief, provided daily reporting is enabled and no brief already exists for that date. Scheduled generation normally creates one brief per Realtor per UTC date; manual Refresh Brief can create a newer desk report.

Reporting dates and "today" currently use **UTC**. In Saint Lucia, midnight UTC is 8 p.m. on the previous local evening. Near that boundary, a calendar event or accounting date may fall into a different reporting day than you expect. Always compare actual event times.

Email scope and timing

Edward's morning email is specifically configured; other Realtors should not assume automatic delivery. The hourly run, queue, AI availability and email service can delay delivery. Manually refreshing the brief does not guarantee a second email that day. Ask the office administrator to investigate a missing email; do not share your password or private keys.

06 / QUICK REFERENCE

What causes the AI to act?

Trigger	Prepared result	Your responsibility
Reporting time reached	A saved daily office brief, subject to enabled settings and the hourly check.	Maintain records; check the desk and any configured email.
New pending listing saved	The hourly autopilot can prepare investment analysis and queue it.	Provide evidence; approve activation/publication or reject.
Buyer submits a Home enquiry	Immediate lead-scoring attempt using supplied buyer information.	Confirm the assigned enquiry and score appeared.
Recent assigned lead remains unscored	The hourly autopilot can score it, suggest properties and prepare a reply.	Review the match and draft; approve and send yourself.
Lead score above 80	A high-priority task due in four hours.	Contact the buyer and record the outcome.
Refresh Brief pressed	A fresh saved desk brief from current office records.	Verify the Written time and report content.
Run autopilot now pressed	Manual processing of eligible listing and lead work.	Check Approval inbox; allow time to finish.
Draft with AI pressed	An editable communication draft for the follow-up.	Check, copy and use it yourself.
Typed/spoken question submitted	An answer based on the office data supplied to the AI.	Verify facts; carry out any action using the relevant controls.

Important distinctions

Analysis pending is not the same as a pending listing. An active listing may still have no approved analysis. **Listed property** is not the same as money earned. **Approved email** is not the same as a sent email. **AI reconstruction** is illustrative, not a survey or architectural certification.

AI requires a working connection, available access/credits and sufficient evidence. If those are unavailable, generation may pause or fail. The office administrator handles service configuration and schedule checks; the Realtor supplies records and oversight.

07 / PRINT AND KEEP BESIDE YOUR DESK

Troubleshooting and daily checklist

If this happens…	Do this…
The Chief of Staff panel is missing	Confirm you are signed in to your verified Realtor account and open Your desk. Ask the administrator to check access.
No fresh brief / generation error	Save your records first and try Refresh Brief once. Keep the exact error and time; ask the administrator to check AI access, credits and the schedule.
No analysis or reply in the inbox	Check listing status, lead assignment and whether the lead is already scored. Autopilot considers recent unscored leads from the last seven days. Allow for bounded hourly batches.
A lead appears but its prepared reply does not	Immediate enquiry scoring and hourly reply preparation are separate. Already-scored leads are skipped by the hourly unscored-lead path; use a linked follow-up and Draft with AI.
Brief is visible but no email arrived	Check spam/junk and your configured recipient. Ask the administrator to confirm whether your account supports email delivery and inspect that day’s delivery result.
Calendar or financial totals look wrong	Check saved dates, device time zone, currency and transaction entries. Reporting uses UTC; currencies remain separate.
Microphone or email window fails	Type your question if speech is unavailable. Copy an approved reply into your email application if the compose window does not open.

Your daily routine

☐ **Start:** sign in; read Today’s Brief; check its Written time.
☐ **Prioritise:** review urgent leads, overdue follow-ups and appointments.
☐ **Approve:** inspect the Approval inbox; approve only verified, suitable work.
☐ **Act:** contact buyers, attend viewings and send reviewed messages yourself.
☐ **Record:** save outcomes, stages, next due dates and actual financial entries.
☐ **Close:** check tomorrow’s calendar and pending tasks; refresh the brief if needed.

When asking for help

Provide the property reference or lead name, the button you pressed, the time and the exact error. Avoid sending buyer contact details unnecessarily, and never share passwords or private service credentials.

Open your Realtor desk • Open the full Realtor guide