HEARTH

PRODUCT OVERVIEW · FOR BROKERAGES, THEIR AGENTS, AND INVESTORS

One desk for your whole brokerage.

Leads, calling, transactions, e-signature, commissions, trust accounting, compliance, marketing, recruiting, and team chat in one place, with each office's data kept apart. Investors get off-market search, sourced deal math, and rental management in the same desk.

Every lead in one place
Website forms, Lead Ads, portal lead emails, and CRM imports, routed to the right agent.

Built-in dialer
Browser dialer, call queue, scripts, calling hours, encrypted recording. Twilio. Needs setup

Deals to payout
Timelines, checklists, Hearth e-signature, and commission splits worked out at close.

Agent websites
Home search from your MLS/IDX feed, your listings, and forms that drop leads into Hearth. Needs setup

Marketing ready to print
The Listing kit, CMAs, flyers, and property sites with your brand.

Investor tools
Off-market search, the Opportunity Score, and calculators that fill in only sourced numbers.

Sourced, in plain English
Acronyms explained, a source on every number, PDF and Print.

Office data kept apart
2-step sign-in, encrypted keys, and a record of who opened what.

What Hearth is

Hearth is a web-based back office and CRM for real estate brokerages. Brokers, office managers, agents, transaction coordinators, and ISAs sign in to the same desk, and each person sees what their role allows. Clients never need an account: they get the private links you send them (client portal, signing, showing feedback, property sites, rent payment).

Outside services (email, texting, MLS/IDX, e-signature, accounting, and others) belong to each office. Until an office connects one, the desk says so plainly and runs that part in demo mode. It doesn't pretend to send or show real data. Keys an office saves are encrypted and used only for that office.

Who it's for

Independent brokerages and multi-office companies that want one system instead of separate CRM, transaction, commission, and marketing tools, and investors who underwrite deals, work off-market seller lists, and manage rentals. It works in any country: each office sets its currency, language format, time zone, and units.

Role	What they do in Hearth (defaults)
Broker	Runs the office. Sees everything and changes roles, permissions, office keys, billing, payouts, trust accounting, and data settings. Can view the desk as a teammate to help them ("Act as"), and adjusts what TCs, ISAs, and office managers may do.
Office manager	Sees every office deal and task, manages the roster and invites, profiles and branding, chat channels, the email log, and recruiting and licenses. The broker can also grant billing, keys, payouts, and trust accounting.
Agent	Works their own leads and deals, sees their own commissions, and uses the marketing and investor tools.
Transaction coordinator (TC)	Works every office deal: milestones, documents, forms and e-sign, tasks, and compliance review. Never moves money.
ISA (inside sales agent)	Works the unassigned lead pool, qualifies leads, and hands them to agents. Never sees deal money.
Super admin	Hearth's own staff: offices, platform billing, and support. Must use 2-step sign-in.

What's on the desk

The tools many brokerages and investors buy one by one, and where each lives in Hearth. On the desk they share one sign-in, one set of leads and deals, and one office's data. Cards tagged Plug & play connect to an account you already have.



CRM PLUG & PLAY Leads & Prospecting → Leads

E-sign PLUG & PLAY Documents → Forms & e-sign

Flyers Marketing → Marketing tools

Property data PLUG & PLAY Leads & Prospecting → Off-market search

Recruiting Team & Compliance → Recruiting & licenses

Agent website PLUG & PLAY Settings → Profile & branding → Agent website

Transactions Clients & Deals → Transactions

Dialer PLUG & PLAY Leads & Prospecting → Leads → Call queue

CMA PLUG & PLAY Marketing → Marketing tools → CMA

Commissions PLUG & PLAY Money → Finance, Trust & escrow, Payouts & billing

Deal analysis PLUG & PLAY Calculators, and Investors & Property Mgmt → Underwriting

Typical published prices as of Oct 26, 2026; your costs may vary.

Bought separately, for one person: $254.84/mo

Follow Up Boss Grow ($58) + dotloop Premium ($28.67) + Mojo Agent Access + Single Line Dialer ($99) + Canva Pro ($12) + DocSend Personal ($10) + Placester Agent Essential ($47.17), at published prices. For an office: 5 agents $1,579.20/mo, 15 agents $4,254.60/mo, 50 agents $13,224/mo (see "The full desk, for an office").

Hearth, for the whole office

Boutique: $499/mo up to 15 seats (about $33.27 a seat when every seat is used)
Growth: $999/mo up to 50 seats (about $19.98 a seat when every seat is used)
Scale: $1,499/mo up to 100 seats (about $14.99 a seat when every seat is used)
Introductory, per office, billed monthly. The 6 per-person tools for 2 or more people cost more than Boutique; for one person, separate tools can cost less.

Use some or use all, same price. The plan price is the same whether your office uses one of these tools or all of them. Plug & play parts still need your own account with that company, billed by them.

Published prices, side by side

One example tool for each kind of tool Hearth covers, at the price its company publishes, with the page it was read from.

Typical published prices as of Oct 26, 2026; your costs may vary.

Kind of tool	In Hearth	Example tool and its published list price	Source
CRM INCLUDED + PLUG & PLAY CRM (customer relationship manager)	Leads, routing & drips Leads & Prospecting → Leads **Plug & play:** Texts and email go out through the office's own Twilio and SendGrid or Postmark accounts; BoldTrail lead data can be read in.	**Follow Up Boss Grow: $58/mo** per user, billed annually ($69 billed monthly).	https://www.followupboss.com/pricing Checked Oct 26, 2026
Transactions INCLUDED Deal files, checklists, broker review	Deal files & compliance Clients & Deals → Transactions	**dotloop Premium: $28.67/mo** per agent, billed annually at $344/year ($34.99 billed monthly); includes e-signatures.	https://www.dotloop.com/premium/ Checked Oct 26, 2026
E-sign INCLUDED + PLUG & PLAY E-signatures and notary requests	Signing & notary Documents → Forms & e-sign **Plug & play:** Optional: send through the office's own DocuSign account, and remote online notarization through its own Proof (Notarize) account.	**Docusign Real Estate: $25/mo** per user, billed annually; 100 envelopes per user per year. Not added to the totals: the dotloop plan above already includes e-signatures.	https://ecom.docusign.com/plans-and-pricing/real-estate Checked Oct 26, 2026
Dialer INCLUDED + PLUG & PLAY Calling through a lead list	Call queue & scripts Leads & Prospecting → Leads → Call queue **Plug & play:** Calls and texts run on the office's own Twilio account, and Twilio bills them per use.	**Mojo Agent Access + Single Line Dialer: $99/mo** per dialing agent, month to month ($10 Agent Access + $89 dialer license).	https://www.mojosells.com/pricing/ Checked Oct 26, 2026
Flyers INCLUDED Flyers, social posts, business cards	Listing kit & cards Marketing → Marketing tools	**Canva Pro: $12/mo** per person, billed yearly at $144/year ($18 month to month).	https://www.canva.com/learn/canva-pro-vs-canva-enterprise/ Checked Oct 26, 2026
CMA INCLUDED + PLUG & PLAY CMA (comparative market analysis) reports	From your MLS/IDX Marketing → Marketing tools → CMA **Plug & play:** Comparable homes come from the office's own MLS/IDX feed (SimplyRETS or a RESO Web API connection).	**Cloud CMA with Homebeat: Not published** per agent, price shown only after a sign-up form; many MLSs include it for members. Not added: no price on an open page, and many MLSs include a CMA tool.	https://cloudagentsuite.com/tools/cma Checked Oct 26, 2026
Property data INCLUDED + PLUG & PLAY Property data and skip tracing (finding an owner's contact details)	Off-market search Leads & Prospecting → Off-market search **Plug & play:** Skip tracing, nationwide owner lists and property details use the office's own BatchData, ATTOM, PropStream or RentCast account; Lob sends letters.	**PropStream Essentials: $99/mo** per account, billed monthly; nationwide data. Not added: Hearth's free parcel records cover Santa Clara County only (ZIP-level market data is nationwide), so outside the county you would still need a data provider.	https://www.propstream.com/pricing Checked Oct 26, 2026
Commissions INCLUDED + PLUG & PLAY Commissions, payouts and trust accounting	Splits, payouts, trust Money → Finance, Trust & escrow, Payouts & billing **Plug & play:** Optional: closed deals can be sent to the office's own QuickBooks Online or Xero.	**Paperless Pipeline with Commission Module: $127/mo** per office, month to month, for up to 5 new transactions a month, rising with volume ($198 up to 10, $254 up to 25, $304 up to 40, $454 up to 80); unlimited users. Not added to the one-person total: it's priced per office. Office totals use the step that fits about 9 transaction sides per agent a year.	https://www.paperlesspipeline.com/pricing Checked Oct 26, 2026
Recruiting INCLUDED Recruiting and license tracking	Pipeline & CE alerts Team & Compliance → Recruiting & licenses	**Brokerkit Starter: $99/mo** per office (1 user seat), annual agreement, paid monthly. Not added to the one-person total: it's priced per office (counted once in office totals).	https://getbrokerkit.com/home/pricing/ Checked Oct 26, 2026
Deal analysis INCLUDED + PLUG & PLAY Rentals, flips, BRRRR (buy, rehab, rent, refinance, repeat)	Calculators & analyzer Calculators, and Investors & Property Mgmt → Underwriting **Plug & play:** Sold comparables for ARV come from the office's own MLS/IDX feed.	**DealCheck Plus: $10/mo** per person, billed monthly (a free Starter plan also exists). Not added: an investor tool, so it's left out of the agent and office totals.	https://dealcheck.io/pricing/ Checked Oct 26, 2026
Agent website INCLUDED + PLUG & PLAY Agent website with home search from the MLS (multiple listing service)	Home search & agent site Settings → Profile & branding → Agent website **Plug & play:** Home search and the agent's listings come from the office's own MLS/IDX feed account; the website itself is Included.	**Placester Agent Essential: $47.17/mo** per agent website, billed annually at $566/year ($59 billed monthly); its MLS/IDX integration is a $25/month add-on, not counted.	https://placester.com/pricing Checked Oct 26, 2026

More of the desk, and the full desk for an office

Five more kinds of tool Hearth covers that aren't drawn on the desk.

Kind of tool	In Hearth	Example tool and its published list price	Source
Lead routing INCLUDED Who gets each new lead	Round robin & pool Settings → Office (lead routing) and Settings → Lead sources	**Part of the CRM line:** Lead routing comes with CRMs like the one above, so it isn't priced on its own. Not added: counted with the CRM line, so it isn't added twice.	https://www.followupboss.com/pricing Checked Oct 26, 2026
Secure links INCLUDED Private, tracked links for clients and partners	Private document links Documents → Secure links	**DocSend Personal: $10/mo** per user, billed yearly ($15 billed monthly); 1 user.	https://www.docsend.com/pricing/ Checked Oct 26, 2026
Social scheduling INCLUDED Social media scheduling	Post now or later Marketing → Marketing tools → Social posting	**Buffer Team: $30/mo** per office (3 channels at $10 each), billed yearly at $120 per channel ($12 a channel billed monthly); unlimited team members. Not added to the one-person total: it's priced per office channel (counted once in office totals, for Instagram, LinkedIn and YouTube).	https://buffer.com/pricing Checked Oct 26, 2026
Listing sites INCLUDED A one-page site for each listing	One-page property sites Marketing → Marketing tools → Property sites	**SinglePropertySites 10 Active Listings (multi-user): $49/mo** per office, month to month, up to 10 live listing sites (more cost more). Not added to the one-person total: it's priced per office (counted once in office totals, at the 10-listing level).	https://singlepropertysites.com/pricing.php Checked Oct 26, 2026
Notary requests INCLUDED + PLUG & PLAY Sending a document to a notary and tracking it	Send & track Documents → Forms & e-sign → Notary **Plug & play:** Remote online notarization runs on the office's own Proof (Notarize) business account.	**No like-for-like tool:** We found no published price for an office tool that only sends and tracks notary requests; remote notarization itself is priced by the partner (Proof's page asks you to talk to sales). Not added: no comparable published price.	https://www.proof.com/pricing Checked Oct 26, 2026

The full desk, for an office

Every Included line with a published price, bought separately: each per-person tool for every agent, and each per-office tool once. Plug & play accounts and anything Not offered are left out.

Tool and price basis	5 agents	15 agents	50 agents
CRM Follow Up Boss Grow, $58 per person	$290	$870	$2,900
Transactions dotloop Premium, $28.67 per person	$143.35	$430.05	$1,433.50
Dialer Mojo Agent Access + Single Line Dialer, $99 per person	$495	$1,485	$4,950
Flyers Canva Pro, $12 per person	$60	$180	$600
Commissions Paperless Pipeline with Commission Module, per office, by new transactions a month	$127 (up to 5 a month)	$254 (up to 25 a month)	$304 (up to 40 a month)
Recruiting Brokerkit Starter, $99 per office	$99	$99	$99
Secure links DocSend Personal, $10 per person	$50	$150	$500
Social scheduling Buffer Team, $30 per office	$30	$30	$30
Listing sites SinglePropertySites 10 Active Listings (multi-user), $49 per office	$49	$49	$49
Agent website Placester Agent Essential, $47.17 per person	$235.85	$707.55	$2,358.50
Bought separately, a month	**$1,579.20**	**$4,254.60**	**$13,224**
If only some agents dial: without the dialer line	$1,084.20	$2,769.60	$8,274
Hearth plan that fits	**Boutique $499/mo**	**Boutique $499/mo**	**Growth $999/mo**

Use some or use all, same price. The plan price is the same whether your office uses one of these tools or all of them. Plug & play parts still need your own account with that company, billed by them.

Included, Plug & play, Not offered

Every line on the desk is sorted into one of three tiers, so it's clear what the plan price covers.

Included
Built into Hearth and covered by the plan price. Nothing else to buy.

Plug & play (bring your own account)
Hearth connects to an account your office already has, or opens with that company. That company bills you directly, so it isn't in Hearth's price or in any total here.

Not offered
Hearth doesn't do this. Keep the tool you use for it; it isn't counted.

Plug & play accounts Hearth connects to

Twilio: calls, texts and the browser dialer
SendGrid or Postmark: email from your own domain
Your MLS/IDX feed (SimplyRETS, a RESO Web API, or MLSListings): listings, saved searches, CMA comparables and agent website home search
BatchData or ATTOM: skip tracing and nationwide owner lists
PropStream: lead file property data (equity, vacancy, distress)
RentCast: rent and value estimates
BoldTrail: lead file data (contact stage and score)
DocuSign: if your office already signs there (Hearth e-sign is included)
Proof (Notarize): remote online notarization
Lob: mailed letters
QuickBooks Online or Xero: closed deals sent to your books
Stripe: card payments (Stripe charges its fees)

Not offered

Accounting and payroll: QuickBooks Online or Xero keep the books; Hearth sends closed deals to them.
Running the remote notary session: A partner such as Proof runs it; Hearth sends and tracks the request.
Nationwide parcel records for free: Free parcel records cover Santa Clara County today; elsewhere they come from your own data account.

Each company's own published list prices in US dollars before tax, read on the date shown; prices change and plans differ in what they include. Office totals assume each per-person tool for every agent; if fewer agents use one, subtract its line. The transaction step assumes about 9 transaction sides per agent a year (NAR 2026 Member Profile: the typical agent had 9 transaction sides in 2025, https://www.nar.realtor/newsroom/experienced-realtors-anchor-the-industry-as-housing-affordability-remains-top-hurdle-new-nar-report, checked Oct 26, 2026). Example tools are named only to show typical prices; they aren't affiliated with Hearth, and each has features Hearth doesn't. Paid add-ons are never counted as included. Plug & play accounts are paid to those companies: Twilio (calls and texts), SendGrid or Postmark (email), your MLS/IDX data license, BatchData or ATTOM (skip tracing and owner lists), Lob (letters), and Stripe (payment fees).

Features by area

Needs setup needs the office's (or Hearth's) account with an outside service, or a one-time setup step. Until then it runs in demo mode or says "Not connected yet". Early is a first version with limited scope.

Leads

- Lead roster and lead file: stages, owner, notes, and tasks. **Escrow & file notes** are saved and shared with the Pipeline card, with who saved each and when; edits keep every earlier version. Tick many leads and **Assign to** one agent; their open tasks and active deals move too.
- **Pipeline:** buyer and seller deal boards. Each lead shows a 0–100 Engagement score (buyers) or Seller score (sellers), with the reasons explained.
- Import from Follow Up Boss, kvCORE, Lofty, or a spreadsheet (CSV, comma-separated values) with a preview first and a results report you can print or download; export any time.
- Clickable stat cards: each count on the dashboard and lists opens the list filtered to exactly that group.
- Lead routing: round robin, one agent, or an open pool that ISAs work and hand off.
- **Lead sources:** connect website forms, Google Forms, Jotform, Tally, Zapier, and more, with spam protection and a test send. Needs setup
- **Email lead reader:** forward portal emails (Zillow, Realtor.com, Homes.com, Redfin, Trulia) to the office's address. Needs setup
- Facebook & Instagram Lead Ads arrive as new leads. Needs setup
- Automations: alerts when a lead keeps viewing the same home (more than 3 times) or looks at homes priced more than 20% above their search, and a short welcome email series for new leads.

Inbox, texting & calling

- One inbox for texts, emails, and logged calls, with folders, drafts, templates, undo, and Trash.
- **New message** to a lead, or an email to any address.
- Texts through the office's Twilio number; email through its SendGrid or Postmark account. Needs setup
- Call queue and call scripts that show beside each call. Click-to-call and a browser dialer with calling hours. Call recording is off by default and needs encryption on. Needs setup
- One-click unsubscribe and do-not-contact handling, plus an email log of what was sent.

MLS/IDX

- Search listings, send them to leads, save searches that email new matches, and see listing activity.
- Connect with the office's RESO Web API or SimplyRETS access. Needs setup
- MLS/IDX sync (provider today: MLSListings, San Jose): Hearth keeps its own copy, refreshed every 15 minutes, and sends a lead who asks about a listing to the listing agent. Off until the broker's data license and credentials are in place. Needs setup

Showings & calendar

- Showing schedule with access notes, a log of past showings, and buyer feedback links.
- Agenda of showings, tasks, and deal dates, with a private feed for Google, Outlook, or Apple Calendar.
- Google or Outlook calendar sync: Hearth items go out every 30 minutes, and your other events show read-only. Needs setup

Transactions & documents

- Deal files with timelines and milestones your office defines, documents, tasks, and closing dates.
- **Forms & e-sign:** upload blank PDFs, place fields, fill them from a deal, save, then Download PDF or Print.
- **Hearth e-signature:** signers confirm a one-time code, agree to sign electronically, and adopt a signature; every step goes into an audit trail with a certificate of completion. DocuSign also works when connected. DocuSign needs setup
- **Notary requests:** send a document to your own mobile notary through a private link, or to a remote online notary partner once connected. Hearth isn't a notary; a commissioned notary does every notarization.
- **Files:** every stored document in one place, in folders by deal, property, and client, with search, preview, download, and share.
- **Secure links:** private links for people without an account (document requests, offer intake, showing feedback, vendor and lender uploads, investor deal shares). Each expires and can be turned off.
- Lender & title handoff with a wire-fraud verification checklist.
- Client portal: a private page with the deal timeline, documents to sign, and a short to-do list.
- Deal packet: a step-by-step list of the tools to use from the first appointment to an active deal.

Money & compliance

- Close a deal and Hearth calculates the split: caps, referrals, transaction fees, and co-agent shares.
- **Finance:** each closing with its sale price and split math, linked to the deal; click a month to see its closings; GCI (gross commission income), company dollar, and agent caps.
- Payouts & billing: disbursement authorizations, agent charges, and a 1099-NEC (contractor pay) summary with CSV export.
- Trust & escrow ledger per deal, with monthly three-way reconciliation (bank, book, and ledger agree) and a plain note under each button saying what it does.
- Compliance review: required-document checklists per deal type, approve or return files.
- Send closed deals to QuickBooks Online or Xero. Needs setup

Marketing

- CMA (comparative market analysis) from comps, printable or saved as a one-page PDF.
- Listing kit: listing flyer, open house ad, social posts, buyer and seller sheets, and scripts. Flyer profiles keep each agent's look. Download or print.
- **Social posting:** post Listing kit images and property videos to the office's Instagram, LinkedIn, and YouTube, now or on a schedule. Each platform has to approve Hearth's app first. Needs setup
- **Generate report** on desk lists: a branded PDF, a CSV, or a read-only share link.
- Business card designer, property sites (one-page listing sites with an inquiry form), and neighborhood notes.
- Off-market lists: import owner lists, BatchData or ATTOM owner searches, skip tracing (BatchData), and Lob letters. Needs setup
- Optional AI drafting (OpenAI or Anthropic) for listing scripts, neighborhood notes, and lead replies. Without a key, a built-in writer drafts them. Optional

Investors & property management

- Underwriting for rentals, flips, and BRRRR (buy, rehab, rent, refinance, repeat): cap rate, cash-on-cash, DSCR (debt service coverage), ARV (after-repair value), and the 70% rule, with Download PDF and Print. Save analyses and track a portfolio.
- **Calculators** start blank; a chosen property's own facts fill in with a source tag (ARV from its sold comps, rehab from its scope of work, transfer tax from official rates).
- **Off-market search** over every Santa Clara County parcel from free public records, loaded nightly, with a **Distressed** filter that uses real records only (pre-foreclosure and probate only from the office's own BatchData account).
- **Investor deal shares:** send one investor a private link to a listing or parcel and see when they open it. Street-level photos from Mapillary show where it has coverage.
- Property management: rentals, tenants, leases, a rent ledger, maintenance tickets, and a monthly owner statement.
- Rent payment links through the office's Stripe account. Needs setup
- Seller data: Census, county tax-defaulted list, CA WARN (layoff) notices, and San Jose permits are collected; the tax list feeds the score. Early
- Tenant screening runs as a demo only. No live screening provider is connected. Demo only
- Wholesale map: real Santa Clara County parcels ranked by the **Hearth Opportunity Score**, Hearth's own 0–100 scoring from free public records, every point shown, plus an estimated transfer year. One scale of five bands suggests a next step: Watch 0–19, Nurture 20–39, Market 40–49, Reach out 50–64, Priority 65+ (an office can move them). 70+ also gets the **Hot** badge, the same 70+ as Hot leads.

Team

- Invite agents, TCs, ISAs, and office managers. Resend or revoke invites, reassign leads, and deactivate or reactivate staff.
- Team chat: an office channel, groups, direct messages, mentions, and linking a lead or deal.
- **Recruiting & licenses:** a recruiting pipeline with an onboarding checklist, plus licenses and CE deadlines with expiry alerts. Brokers and office managers can edit or remove a license (logged), and a license number already on file is refused.
- Profiles and branding: agent cards, photos, and the office logo on flyers, CMAs, and emails.
- Agent website, opt-in: an about page, home search with a map and listing pages, and the agent's active and sold listings, from the office's own MLS/IDX feed (Plug & play). Listing brokerage, MLS notice, last-updated time and the Equal Housing Opportunity notice on every page; contact forms create leads for that agent. No phone number.
- Public agent pages, opt-in: a simple profile page to share by link, with no phone number, email only if the agent chooses, and hidden from search engines.

Everyday tools

- Dashboard with today's tasks, appointments, activity, and playbooks.
- Calculators: mortgage, affordability, seller net, cash to close, commission split, rental cash flow, and fix & flip, each printable as a one-page PDF.
- Text alerts to agents for new leads and hot activity, with short links.
- A sidebar menu you can reorder, help tips on each page, and an ⓘ with a plain-English meaning beside every acronym and data source.
- A user manual for each role, built in and downloadable as a PDF.

Office setup & data

- A setup checklist: country and currency, logo, email sender, invites, commission plans, lead routing, and compliance checklists.
- Roles & permissions for the adjustable roles.
- **Your data:** download everything in one file, set how long documents are kept, place a legal hold, or schedule the office's deletion.
- **Data sources:** every source Hearth loads, with its publisher, license, refresh schedule, and what it can't tell you. Area facts (Census, schools) never feed the score.

Integrations and what each needs

Service	Used for	What's needed
Twilio	Texts, click-to-call, browser dialer	The office's Twilio account and number (and a TwiML app for the browser dialer)
SendGrid or Postmark	Email, drips, saved-search alerts	The office's API key and sender address
Postmark inbound	Email lead reader	Set up once by your Hearth administrator
RESO Web API / SimplyRETS	MLS/IDX search	Access from your MLS or its vendor (data-license fees vary)
MLSListings (San Jose)	Synced MLS/IDX copy and MLS/IDX lead routing	The broker of record's data license; credentials added by your Hearth administrator
DocuSign	E-signature (in-app signing works without it)	The office's DocuSign API account
Google / Microsoft 365	Calendar sync	Each person connects their calendar
QuickBooks Online / Xero	Sending closed-deal entries	Connect, then pick four ledger accounts
Facebook & Instagram	Lead Ads to leads; posting to Instagram	Connect the office's Page; posting needs Meta's approval of Hearth's app
LinkedIn, YouTube	Social posting	Connect each account; each platform approves Hearth's app first
Stripe	Rent payment links; Hearth subscription billing	The office's Stripe key for rent
BatchData, Lob, ATTOM	Skip tracing, letters, owner lists, paid Distressed categories	The office's API keys (each charges per use)
Remote notary partner	Remote online notarization	A partner account; until connected, nothing is sent
Mapillary, RentCast	Street photos; rent and value estimates	Set up by your Hearth administrator (RentCast lookups are capped each

		month)
OpenAI / Anthropic	Optional AI drafting	An API key (optional)

Security and data protection

This describes how Hearth is built. Some protections are switched on per site as setup steps finish. Hearth's public Security page (**hearthpro.net/security**) lists exactly what's on for that site today.

Always on

Office and role separation

Each office's leads, deals, documents, and messages stay inside that office. Every page and API checks the person's role and office on the server, not just in the browser.

Private connection

HTTPS everywhere with HSTS, plus security headers that stop clickjacking and limit what pages can load. Sign-in cookies are HttpOnly and Secure.

Passwords

Stored only as salted scrypt hashes. At least 10 characters, and passwords known from breaches are refused. Five wrong tries lock the account for 15 minutes.

Office service keys

Encrypted with AES-256-GCM before they're stored, and tied to their office and field. After saving, the desk shows only the last four characters.

Automatic sign-out

Changing a role, moving offices, deactivating an account, or resetting a password signs that person out everywhere. Sessions end after 12 hours, and after an idle limit the broker sets (15 minutes to 12 hours; 2 hours by default).

Managed database and backups

Hosted on Neon with encrypted storage, TLS connections, and point-in-time restore.

Built in, switched on per site

2-step sign-in

A 6-digit code by email, text, or an authenticator app, plus backup codes and 30-day trusted devices. Brokers can require it for the whole office.

Devices and remote sign-out

See every device signed in, sign any of them out, and get an email when a new device signs in.

Activity log

A permanent record of sign-ins, documents opened, downloaded, or signed, role changes, exports, and license changes. Entries can't be edited or deleted, and a hash chain lets the broker check the whole record.

Per-office encryption

Signed contracts, filled forms, deal files, office form templates, and private notes and messages are encrypted with a key that belongs to the office. Contact details aren't under this extra lock, so they stay searchable.

Links that expire

Signing, portal, showing, rent, and file-share links are long random codes stored only as hashes. Each expires and can be turned off.

Your data, your call

Full export at any time, document retention of 1–30 years (7 by default), legal hold, and office deletion after a 30-day wait you can cancel.

Hearth doesn't claim certifications it doesn't hold. Security questionnaires and specific requirements: admin@hearthpro.net.

Plans

Introductory pricing

Hearth is priced per office by number of seats. Agents, TCs, ISAs, and office managers each take a seat; the broker doesn't.

Boutique
$499/mo per office
Up to 15 seats

MOST POPULAR
Growth
$999/mo per office
Up to 50 seats

Scale
$1,499/mo per office
Up to 100 seats; larger or custom setups: contact us

Introductory prices, billed monthly through Stripe. Growth is the suggested plan. Every plan has the full desk; plans differ in seats.

Feature summary

Area	Included	Needs setup
Leads & routing	Roster, pipeline, import/export, round robin or pool, ISA handoff, automations	Lead sources, email reader, Lead Ads
Inbox & texting	Texts, email, calls, drafts, templates, new message to anyone, unsubscribe	Twilio, SendGrid/Postmark
Calling	Call queue, call scripts, click-to-call, browser dialer	Twilio
MLS/IDX	Search, send to leads, saved searches, listing activity	RESO / SimplyRETS / MLSListings
Showings & calendar	Schedule, feedback, agenda, calendar feed	Google/Outlook sync
Transactions	Deal files, milestones, documents, lender & title, client portal, deal packet	—
Forms, e-sign & notary	Templates, fill, Download PDF, Print, Hearth e-signature, notary requests, Files hub	DocuSign, notary partner (optional)
Commissions & payouts	Splits, caps, fees, disbursements, 1099-NEC	QuickBooks/Xero (optional)
Trust & compliance	Trust ledger, reconciliation, compliance review	—
Marketing	CMA, listing kit, flyer profiles, business cards, property sites, campaigns, Generate report	AI keys (optional)
Social posting	Instagram, LinkedIn, YouTube, now or scheduled	Platform approval
Off-market	Parcel search, Opportunity Score, Distressed filter, Data sources, Seller data **Early**, saved searches	BatchData, Lob, ATTOM (lists, skip trace, letters)
Investors & rentals	Sourced calculators, underwriting, deal shares, portfolio, rentals, tenants, rent ledger, maintenance	Stripe (rent links)
Team	Invites, roles, chat, recruiting, licenses & CE (continuing education), branding, opt-in agent pages	—
Security	Office separation, encrypted keys, auto sign-out, 2-step, activity log, per-office encryption	Switched on per site
Your data	Export, retention, legal hold, deletion	—