



AI Agents: 10+ Use Cases Transforming Real Estate

Explore 10+ AI agent workflows that help property operators streamline maintenance, automate arrears, and validate financial assumptions, reducing operational drag and improving performance.

The Secure, No-Code AI Platform for Real Estate Investors and Managers

Real estate is a paperwork-heavy, coordination-intensive industry. Whether it's preparing due diligence packages for acquisitions, reviewing environmental and zoning documents, processing rent rolls and T-12s, coordinating vendors across a property portfolio, responding to tenant requests, or managing compliance with evolving local regulations, teams lose enormous time digging through PDFs, leases, inspection reports, service agreements, and scattered back-office systems. None of this work is optional, but it drains analyst and operator capacity, introduces avoidable risk, and slows both deal cycles and property execution.

StackAI, a secure, on-prem or hybrid-cloud AI orchestration platform, now enables real estate teams to automate documentation, unify property and financial data, and surface validated insights instantly. Instead of replacing analysts, leasing teams, or property managers, AI agents work alongside them. And with proper governance and auditability, and seamless integrations with Appfolio, RentCafe and Yardi, teams gain confidence in AI outputs, shorten turnaround times, and reduce errors across both the deal lifecycle and day-to-day operations.

What are AI Agents?

Unlike basic automation tools or chatbots tied to static workflows, AI agents in real estate settings can securely interact with leases, estoppels, zoning and entitlement documents, rent rolls, service contracts, environmental reports, maintenance logs, regulatory frameworks, and financial models. They can extract critical data points from OMs, classify operational issues across assets, and generate structured outputs. In practice, AI agents translate into faster deal evaluations, tighter financial validation, cleaner investor reporting, and more proactive property management. Acquisitions teams get accelerated underwriting and diligence; asset managers get real-time visibility and standardized reporting; property managers get higher tenant satisfaction and fewer manual bottlenecks.



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Real Estate Management

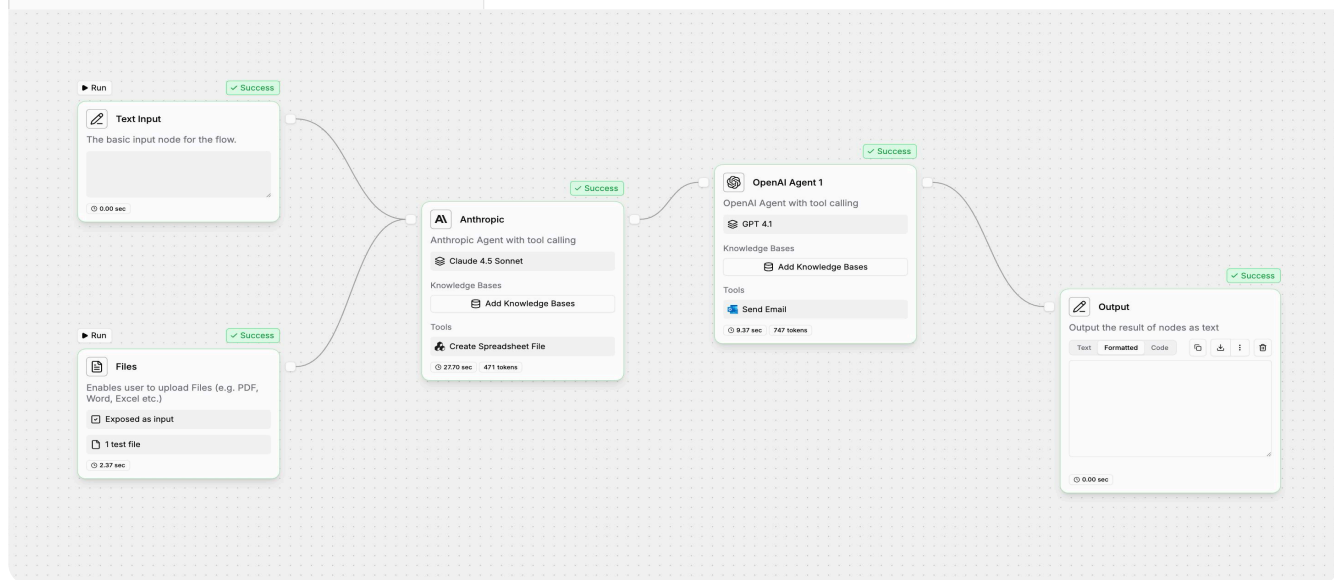
Explore AI agent use cases for property management and operations teams who want faster tenant workflows, fewer administrative errors, and more responsive building performance.

Arrears Analyst

Manually reviewing financial arrears data, adding contextual comments, and distributing updated Excel files via email is tedious and error-prone.

This agent automates the review of arrears data, intelligently adds comments based on business rules (overdue amounts and days), and generates an updated Excel file.

Who It's For	Property Managers, AR Specialists, Finance Managers
Results	• Automated, rule-based comments added to arrears data • Updated Excel file generated and emailed in minutes
Workflow	1. User provides a message and uploads an Excel file containing arrears data 2. LLM reviews the data, applies business rules, and adds comments 3. LLM sends the file as an attachment via Outlook

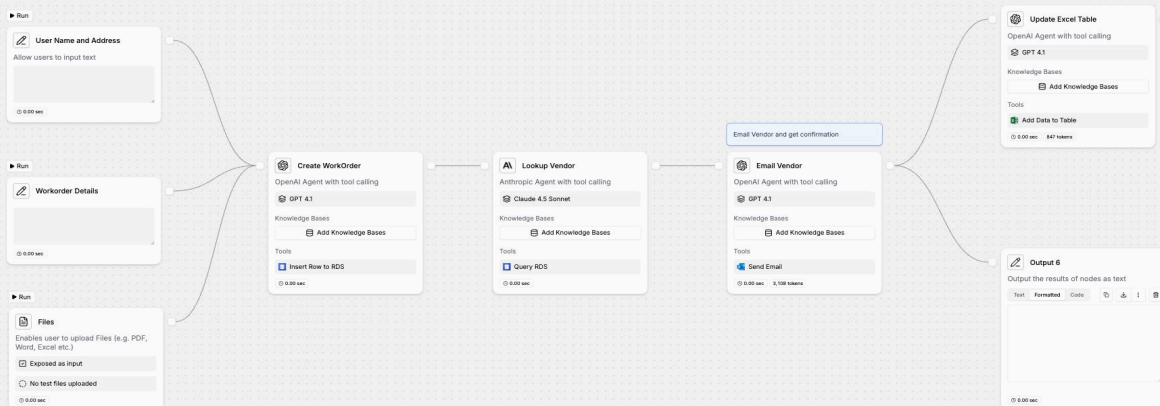


Work Order Intake Agent

Property managers manually coordinate work orders, vendor assignments, and follow-ups across multiple systems, leading to delays and poor communication.

This agent automates the entire work order lifecycle, from creation and vendor matching to email outreach and tracking.

Who It's For	Property Managers, Maintenance Coordinators
Results	• Work orders are automatically created • The best-rated vendor is identified and contacted • Every action is logged to an Excel tracker
Workflow	1. User submits work order details, address, and attachments 2. LLM analyzes the repair type and queries the database to find the top-rated vendor for the job 3. A professional email is automatically drafted and sent to the vendor with all work order details 4. Logs the action and next steps to Excel

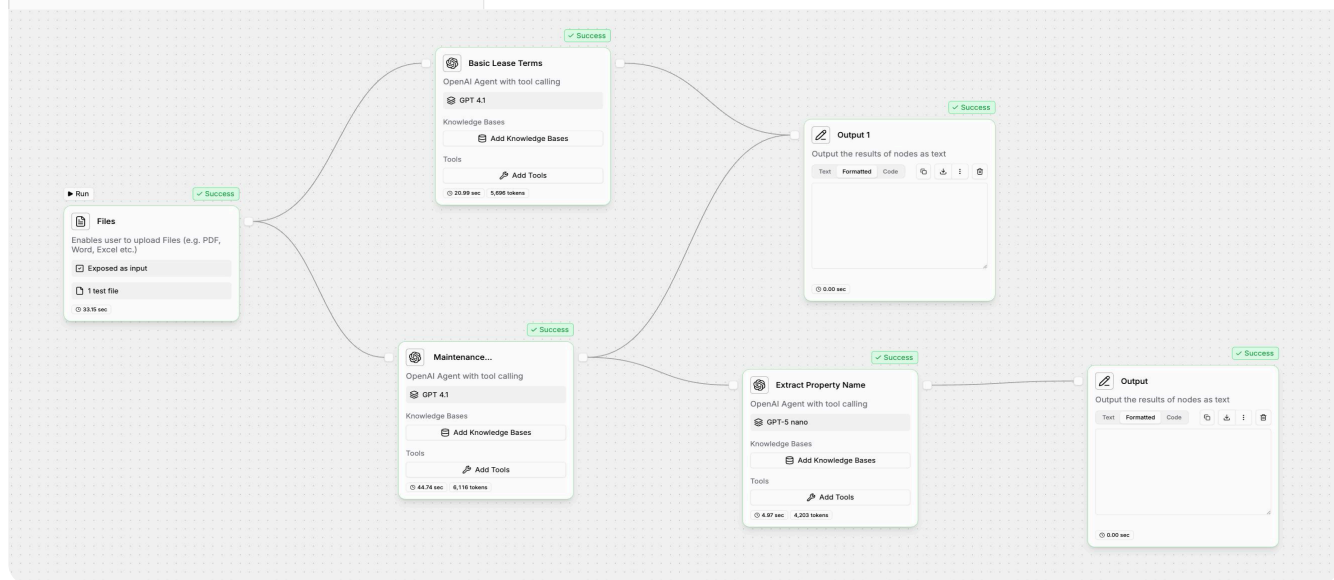


Lease Abstractor Agent

Manually reviewing commercial leases to extract maintenance responsibilities and rent terms creates bottlenecks in real estate management.

This agent automates the extraction and structuring of lease data points (including maintenance responsibilities, term dates, and financial clauses) into validated JSON.

Who It's For	Property Managers, Lease Administrators
Results	- Structured JSON output with 50+ lease data points including maintenance responsibilities, tax clauses, and term dates - Confidence scores and notes for each extracted value to flag items needing human review
Workflow	- Lease documents are uploaded and parsed via OCR-enabled file processing - Two parallel LLMs analyze the document for basic lease terms and maintenance responsibilities - Structured JSON with confidence scores delivered



Real Estate Investment

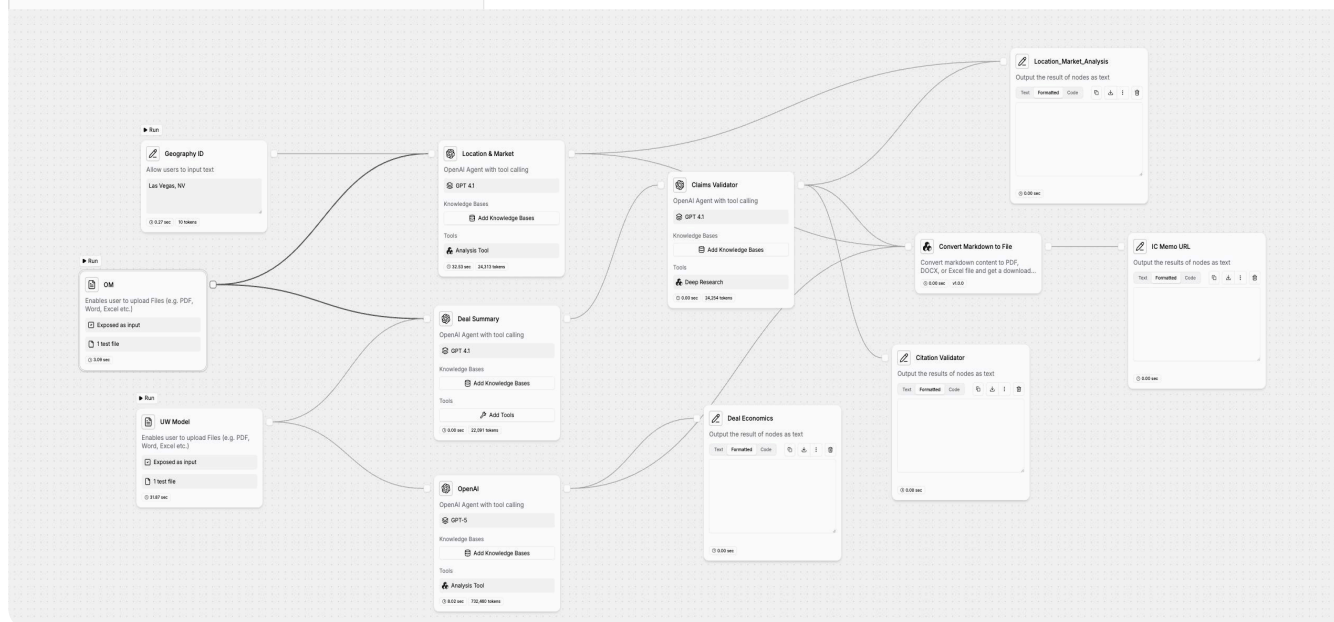
Explore 10+ real-world AI agent use cases for real estate investment teams who want accelerated knowledge retrieval, instant OM insights, and sharper investment conviction.

Acquisition Analysis Memo Drafter

Creating comprehensive investment memos for real estate deals requires manually analyzing offering memorandums, underwriting models, and more.

This agent automates the generation of professional investment committee memos by analyzing OM documents, Excel models, and market data, then validating claims.

Who It's For	Real Estate Investment Managers
Results	- Location analysis, deal economics, and validated claims in one document - OM assertions are automatically researched and tagged as validated or needing review
Workflow	- Upload offering memorandum (PDF) and underwriting model (Excel) files - LLM extracts market context, deal economics, and financial projections from both sources, then researches claims from the OM - Investment memo document is formatted

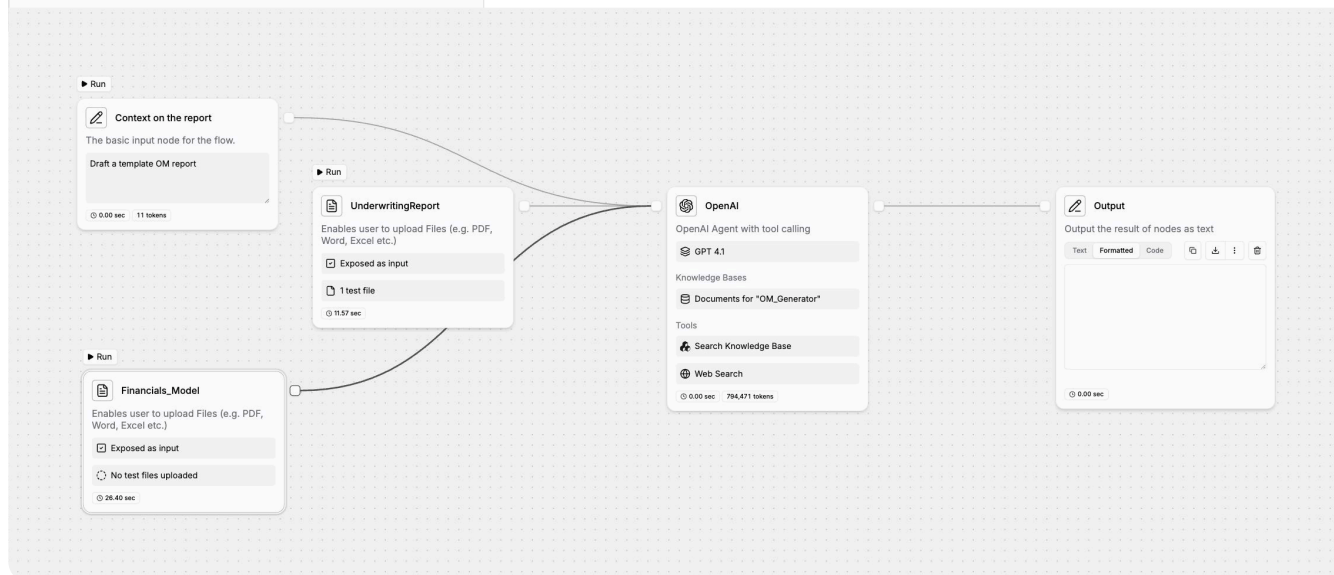


OM Generator Agent

Creating professional Operating Memorandums (OMs) for real estate investments requires hours of manual work compiling a polished, multi-section document.

This agent automates the generation of comprehensive, multi-page Operating Memorandums by synthesizing underwriting reports, financial models, and research.

Who It's For	Real Estate Investment Analysts
Results	• Professionally formatted multi-section OM documents generated in minutes instead of hours • Consistent structure and branding across all investment memorandums
Workflow	1. User provides underwriting report and financial model files along with any additional context 2. LLM processes and extracts key data from the uploaded documents 3. Produces a complete OM with asset summary, financials, market analysis, and team overview

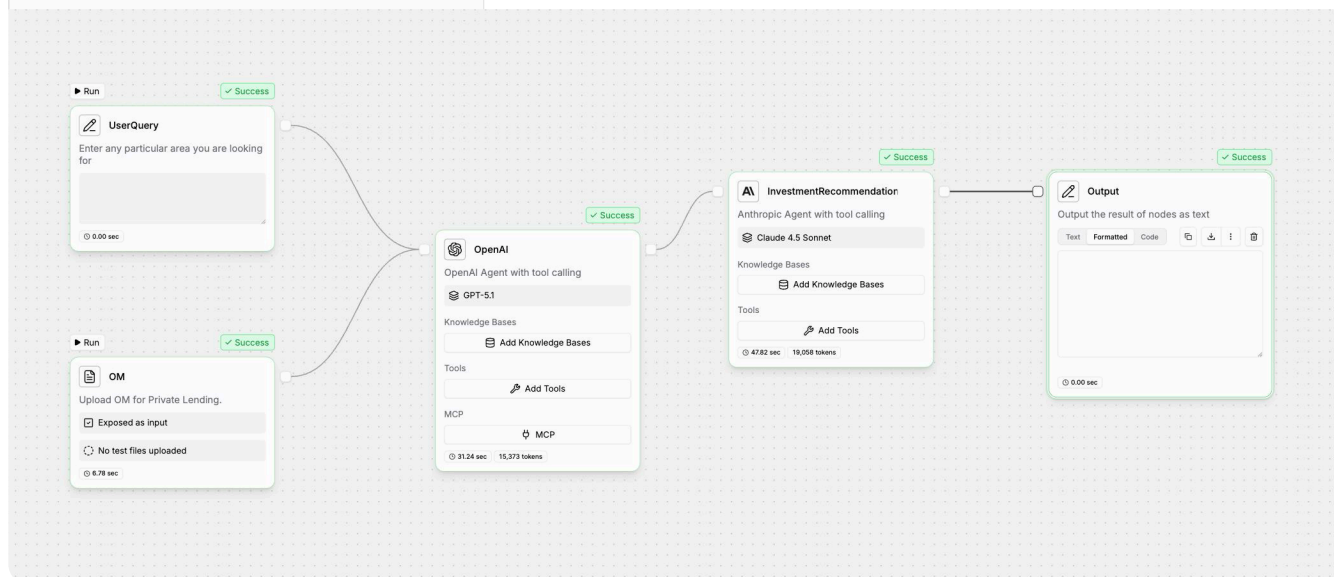


OM Summarizer Agent

Manually reviewing private lending operating memorandums is tedious, time-consuming, and requires deep expertise

This agent automates the extraction of critical investment data from real estate OM's and provides AI-powered portfolio manager recommendations.

Who It's For	Real Estate Investment Managers
Results	• Instant extraction of key metrics: Target IRR, cash-on-cash returns, tax benefits, risk profile, and lock-in periods • AI-generated investment recommendation based on current market trends and interest rates
Workflow	1. User uploads an Operating Memorandum PDF 2. LLM pulls key investment data points 3. LLM evaluates the data against market conditions and provides a recommendation 4. Final investment analysis with citations is created



AI Agents for Real Estate

Use Case 7: Critical Lease Date Calendar Assistant	Problem: Asset managers with hundreds of leases can easily miss a notice deadline. Solution: This agent identifies every date warranting a reminder, and creates events on the calendar with lead time.
Use Case 8: Cotenancy Requirements Analysis	Problem: Missing a cotenancy trigger when a key anchor leaves can cascade into rent reductions across the rent roll. Solution: The agent ingests every tenant's lease, extracts cotenancy clauses, and builds the dependency graph.
Use Case 9: Inbound Deal Categorization	Problem: Classifying and routing every inbound deal before it gets the right specialist analysis takes 30-60 minutes. Solution: This agent categorizes deal type from an inbound email, runs analysis, and produces a structured deal summary.
Use Case 10: Marketing Leasing Presentation Generator	Problem: Configuring and writing each version of a property marketing deck takes hours and the format drifts. Solution: The agent pulls property data, comparables, tenant mix, amenity narratives, and generates a polished deck.
Use Case 11: Due Diligence Email Extraction & Smartsheet Tracking	Problem: Due diligence reports arrive by email and can sit unrouted to the correct deal in the pipeline. Solution: On an Outlook trigger, matches DD reports to the correct deal and extracts key findings/red-flag items.

[WANT TO SEE MORE?](#)[Get a Demo](#)

The use cases in this white paper are just the beginning. With StackAI's drag-and-drop interface, secure infrastructure, and 100+ integrations, anyone can build production-ready AI agents in just a few clicks.



Let's Build AI Agents for
Real Estate, Together

Get a Demo

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