Use the Transaction Management (TM) App to finalize Agreements - Chapter 2

High-Rise - Purchase Agreement, Conditional Offer

‼ ***You don't need this type of agreement? See our other High-Rise project chapters:***

Chapter 1: *Finalize High-Rise Purchase Agreements with Firm Offers,*

Or ***Chapter 3:*** *Finalize High-Rise Lease Agreements.*

Or Our Chapters for Low-Rise Projects

Chapter 4: *Finalize Low-Rise Purchase Agreements with Firm Offers*

Chapter 5: *Finalize Low-Rise Purchase Agreements with Conditional Offers,*

Chapter 6: *Finalize Low-Rise Lease Agreements.*

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Introduction:

The Transaction Management App allows users to finalize, sign, act, and manage Agreements (Lease, Purchase, and Sale) in a very efficient way.

Bildhive's Transaction Management App makes the process more efficient because it:

- **Integrates with the rest of the Bildhive Apps, allowing the sales agent to pull information automatically from the other applications to populate contracts**
- **Integrates with DocuSign for Real Estate SKU to easily route, sign, and securely store all agreements**
- **Complies with the most stringent global security standards**
- **Generates agreements that are lawful and admissible in a court of law**

!! ***The Transaction Management App, Condo Unit Configurator, and Contract Configurator, all work together.***

- *In the **Condo Unit Configurator**, you enter all the **Details** about your condo unit (including floorplans and add-ons).*
- *The **Contract Configurator** allows you to configure all the **Contract** fields.*
- *The **Transaction Management** App pulls in **Information** about the **Unit** and the **Contract** that contains all the fields. Then you **Fill the Contract** with the transaction information. Finally, you **Send** the contract to all parties for their **Approval, Signature,** or **Review.***

Use the Transaction Management (TM) App to finalize Agreements

Chapter 2– High-Rise - Purchase Agreements, Conditional Offer

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Get Started

1. **Launch the Transaction Management (TM) App**

    1.1. Go to the project's **Workplace,**
    1.2. Under **Customer & Transaction Management,** find the **Transaction Management App**
    1.3. **Click** on it

    Info: *When you enter the app, you land on the **All Transactions List.** The first time you use the App, you will not see any transactions.*

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Define your Settings

!! *Define your Settings Before Adding Your First Transaction.*
*This isn't mandatory, but it's a good idea. In **Settings**, you can **Integrate** with **DocuSign** (required for signing with **E-signature and combined E-Signature + In-Person**), add **Default Participants** or Signers, add **Inclusion Information**, and **Default Deposit Structures**.*

2. **Integrate with DocuSign**

    2.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
    2.2. From the **Navigation Bar,** select **Settings**
    2.3. On the **Settings Submenu,** select **Integration**
    2.4. If you are not **Linked** to **DocuSign, Click** on the **Integrate with DocuSign** button
    2.5. If you already have an **Account, Log Into DocuSign**
    2.6. Otherwise, **Create** an account and **Log In**
    2.7. To **Disconnect,** go to the bottom of the DocuSign Integration Section and click **Remove Integration**

    !! *You MUST READ this before Using the E-Signature Signing Method.*
    *E-signature transactions **WILL FAIL** if the recipient's **Email Address** is **Invalid**, so always double-check it.*

    *We advise those who wish to use Bildhive's **E-signature Signing Method to** do two things after creating a DocuSign account:*

    - *First**, Log Into** their **DocuSign** account and create a **Ticket** to **Enable Event Recipient Autoresponded** to receive **Notifications** in **Bildhive** when a transaction fails due to a **Bad Email Address.***
    - *Next, contact their **DocuSign Account Manager a**nd ask them to allow the **Envelope Correct Function** so that changes to the **Purchasers'** and the **Reps' Information** can be made directly from **Bildhive (only** while the transaction is **Pending).***

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3. **Add, Edit, and Delete Default Participants or Signers**

!! ***Who are Considered Default Participants?***

Default Participants *are those on the vendor's side whose signatures are* ***Always*** *required for a transaction to proceed (CEO, Accountant, etc.). If you already know who they are, enter their names.*

3.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)

3.2. From the **Navigation Bar,** select **Settings**

3.3. On the **Settings Screen,** select **Default Participants**

3.4. At the **Bottom** of the New Participant section**,** click **Add New Participant**

3.5. In the **Edit Participant** pop-up, fill-In the information of the **First Default Participant**: **Name***, **Email Address***, **Company,** and **Role**

3.6. Click **Create**

3.7. **Repeat** the steps to add the rest of the **Default Participants**

3.8. To **Edit** or **Delete** a **Participant,** go to the **Action Column** to the **Right** of the Participant and click the **Pencil** or **Delete** icon

3.9. Make the edits and click **Update** or **Delete**

* Mandatory fields.

!! ***The fields that you see differ based on the contract template.***

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4. Adjust a Default Participant’s Info After You’ve Sent the Document

***Info:** **Default Participants** who are **Signers** in a document are considered **Internal Participants** in that transaction. It is possible to edit an Internal Participant's information from the **Settings**, but there are restrictions.*

- *The **TRANSACTION OWNER** is the **ONLY** person who can **Edit** the **Internal Participant’s Information***
- ***DocuSign** has to have the **Envelope Correct Function** enabled*
- *Transactions need to be **Pending** and have **No Signatures***
- *You can’t adjust **Transactions** that are **Completed** or that are **Pending** and already have **Signatures***

4.1. To Adjust the Information, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
4.2. Once the **Left Navigation Bar** opens**,** select **Settings**
4.3. From the **Submenu,** select **Default Participants**
4.4. Go to the **Action Column** to the **Right** of the Participant and click the **Pencil** or **Delete** icon
4.5. Make the edits and click **Update** or **Delete**
4.6. As long as you followed the restrictions, the **Participant** should receive a **New Document** from **DocuSign** with the **Adjusted information**

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5. **Seller's Agents – Complete or Adjust RECO Information Guide and Self-Represent Form**

   5.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
   5.2. From the **Navigation Bar,** select **Settings**
   5.3. From the **Submenu,** under **Customization,** select **Seller's Agents**
   5.4. At the **Bottom** of the **Seller's Agents** section**,** click **Add Seller's Agents**
   5.5. In the pop-up, fill in the information: **Name,*** **Email Address,*** Company, and **Reco Registration Number***
   5.6. **Click Create**
   5.7. **Repeat** the steps to add the rest of the **Default Participants**
   5.8. To **Edit** or **Delete** a **Seller's Agent,** go to the **Action Column** to the **Right** of the Seller's Agent and click the **Pencil** or **Delete** icon
   5.9. Make the edits and click **Update** or **Delete**

* Mandatory fields.

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6. **About Inclusion Information**

Info: ***The Inclusion Information lists any Upgrades, unique elements, or services included in the Contract.***
Examples of inclusions are Hardwood Flooring or Smooth Ceilings.
*To **Add Inclusions** to a contract in the Transaction Management App, you must first set up a **Field** for inclusions in the **Contract Template** (using the Contract Configurator).*

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7. **Add an Inclusion to the List**

7.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
7.2. From the **Navigation Bar,** select **Settings**
7.3. On the **Settings Submenu,** select **Inclusion Information**
7.4. To **Add** your first **Inclusion Item**, go to the bottom of the section and click **Add Inclusion**
7.5. **Give** the inclusion a **Title*** and a **Legal Text** or **Body***
7.6. Click **Create**
7.7. **Repeat** these steps per each of the **Inclusions** in the contract, up to **20** in **Total**
7.8. To **Edit** or **Delete** an **Inclusion,** go to the **Action Column** to the **Right** of the **Inclusion** and click the **Pencil** or **Delete** icon
7.9. Make the edits and click **Update** or **Delete**

* Mandatory field.

!! ***Do you need to Add Inclusions to your Contract Template?***
Follow These Steps

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8. **Traansaction Default Settings-Irrevocable and Cooling Off Dates**

1.1. The **Transaction Default Settings** include **Irrevocable Days** and **Cooling Off Days**
1.2. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
1.3. From the **Navigation Bar,** select **Settings**
1.4. From the **Submenu,** under **Customization,** select **Transaction Default Settings**
1.5. In the **Days** field, type the **Number** of **Days** after which the **Transaction** will become **Irrevocable**
1.6. The **Irrevocable Date** will be **Automatically Calculated** by **Adding** the **Number** of **Days** you entered to the **Contract Creation Date**
1.7. **Save** the information
1.8. To **Edit** the number of Days**, Repeat** the **Steps** and enter a **New Number**
1.9. To **Define** the number of **Cooling Off Days,** enter a **Number** in the field
1.10. To **Switch Off** the **Irrevocable Date, Termination Date, Closing Date, and Outside Closing Date,** move the **Sliders to the Right**

!! This is a Global Setting.
Once you define it, it populates accordingly in your transactions

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9. **Add Deposit Structures**

9.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
9.2. From the **Left Navigation Bar,** select **Settings**
9.3. On the **Settings Submenu,** select **Deposit Structures**
9.4. At the bottom **Left** of the **Main Stage**, click **Add New Deposit Structure**
9.5. In the **Add New Deposit Structure** pop-up, enter a **Name*** for the **Structure**
9.6. Click **Create**
9.7. If **Different Products** have different deposit structures**, Repeat** the process for each of your **Products**
9.8. To **Edit** or **Delete** a **Deposit Structure,** find the **Action Column** next to it and click the **Pencil** or **Delete** icon
9.9. Make the edits and click **Update** or **Delete**
9.10. Now, you need to **Add** the **Number of Installments** for each **Deposit Structure; Follow** These Steps**.**

!! ***Heads -Up. You MUST Link your Deposit Structures to your Contract Template***
*Once you have set your **Deposit Structures** and **Installments** in the **Transaction Manager**, go to the Contract Configurator and **Link** your **Template** to the correct **Deposit Structure**.*

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10. **Add the Number of Installments per Each Structure**

10.1. To add the **Installments** for a **Deposit Structure**, first, select it (selected items appear in orange)
10.2. At the **Bottom Right** of the main stage, click **Add New Deposit**
10.3. The **Add New Deposit** pop-up opens
10.4. **In** the Deposit **Date** field, enter the number of days after Signing the Offer for the first **Installment***
10.5. **Enter** an **Amount**
10.6. **Slide** the **Amount Type** slider to select **Dollars** or **Percentage**
10.7. Click **Create**
10.8. **Repeat** these steps per each one of the **Installments** in each one of the **Deposit Structures**
10.9. To **Edit** or **Delete** an **Installment,** go to the **Action Column** to the **Right** of it and click the **Pencil** or **Delete** icon
10.10. Make the edits and click **Update** or **Delete**

* Mandatory field.

!! ***Heads -Up. You MUST Link your Deposit Structures to your Contract Template***
*Once you have set your **Deposit Structures** and **Installments** in the **Transaction Manager**, go to the Contract Configurator and follow These Steps to **Link** your **Template** to the correct **Deposit Structure**.*

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11. **Add On Deposit Structures**

!! ***Use Add-Ons Deposit Structure when transacting Add-Ons AFTER UNIT SALE.***
This allows you to set up a different deposit structure for these Add Ons (Parking, Locker, Bike Rack). The Deposit Structure Must be defined with the Contract Configurator.

11.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
11.2. From the **Left Navigation Bar,** select **Settings**
11.3. On the **Settings Submenu,** select **Add Ons Deposit Structures**
11.4. At the bottom **Left** of the **Main Stage**, click **Add New Add On Deposit**
11.5. In the pop-up, **Turn** the switch **On** if you want the system to C**alculate the Date Automatically**
11.6. In the Deposit Date field, enter the number of days after the Offer date for this Add On deposit
11.7. In the **Deposit Amount** field, use the **Slider** to choose whether you want to enter a **Percentage** or a **Dollar** amount
11.8. Then, **Type** in the corresponding **Value** into the field
11.9. Use the **Change on Deposit Amount** to **Adjust The Deposit** amount by **Adding** or **Subtracting** a value
11.10. Use the **slider** to choose whether you want to adjust it by a **Percentage** or a **Dollar** amount
11.11. Then, **Type** in the corresponding **Positive** (to add) or **negative** (to subtract) **Values** into the field
11.12. Click **Create**

!! ***Sample Scenario 1: Adjust the Deposit by a Fixed Amount***
*If the deposit amount is initially set at **$10,000** and you input **$-2,000** in the **Change on Deposit Amount** field, the system will calculate and update the deposit amount to **$8,000.***

!! ***Sample Scenario 2: Adjust the Deposit by a Percentage***
If the deposit amount is initially set at $10,000 and you input -10% in the Change on Deposit Amount field, the system will calculate and update the deposit amount to $9,000 (a 10% reduction).

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Add a Transaction

12. **Start a New Transaction**

    12.1. If the **Left Navigation Bar** is not open, go to the top-left of the page under the Bildhive logo and **Click** the **Hamburger Icon** (Three horizontal lines)
    12.2. From the **Navigation Bar,** select **All Transactions**
    12.3. To add your first transaction, on the **All Transactions Screen,** go to the top right and click **Add New Transaction**

Info:* *About Types of Transactions.
*The **Signing Method** (E-Signature or Print and Sign), **w**hether it is a **Purchase of Sale** transaction or a **Lease** transaction, and the **Offer Type** (Firm or Conditional) determine the **Type** of **Transaction**. There are four types, and we describe each in a separate article:*

- E-Signature/ Purchase Agreement/ Firm Offer
- E-Signature/Purchase Agreement/Conditional Offer
- E-Signature/ Lease Agreement
- Print & Sign option for all types of Agreement and Offers

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E-Signature and Combined E-Signature+In-Person (signing method)
Purchase Agreement (Transaction Type)
Conditional (Offer Type)

About Condition Precedent and Condition Subsequent

!! ***Condition Precedent***
*Is an escape clause that applies to deals that are **Not Yet Firm.** These deals are conditional upon a condition and will not be considered firm until the condition is met within a defined period of time (**Grace Period**).*

!! ***Condition Subsequent***
*Is an escape clause that applies to **Confirmed** deals which include an **Escape Plan** (or a plan to terminate the contract) that is valid for x number of days (**Grace Period**), after which, the contract will become **Firm** and can not be escaped.*

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Grace Period and Agreement Status – Pending, Void, Sold Conditional and Sold/ Complete

!! ***When a CONDITIONAL purchase agreement is sent for signatures, it enters a PENDING state.***

- *If the agreed grace period passes **Without All Signatures Being Completed**, the **Agreement** is **Voided**.*
- *The status changes to **Sold Conditional** if **Everyone Signs Within The Specified Time**,*
- *Once the **Conditions Are Met** and the grace period passes, the deal is finalized and marked as **Sold/Complete***

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Read This Before You Start Your E-Signature Transaction

!! ***Integrate with DocuSign before using E-Signature Signing.***

*Click Here. for **instructions** on how to **Integrate** with **DocuSign**.*

!! ***We advise you to do these two things when using DocuSign:***

- *Log into your **DocuSign Account** and **Activate Event Recipient Autoresponded** to receive **Notifications** in **Bildhive** when a transaction fails due to a **Bad Email Address.***
- *Contact your **DocuSign Account Manager a**nd ask them to allow the **Envelope Correct Function** so that changes to the **Purchasers'** and the **Reps' Information** can be made directly from **Bildhive** (only while the transaction is pending).*

!! ***WARNING. Double Check the Recipient's Email Address.***

*If the recipient's email address is **Invalid,** the E-signature Transaction **WILL FAIL.***

!! ***Are you Setting up a Combined E-Signature and in-Person Transaction?***

*You must select **E-Signature** as your **Signing Method** in Step 1 and indicate **Who Signs Online** and **Who Signs in Person** when you Define the Participants' Actions in **Step 5***

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Step 1 – Provide Transaction Information

!! ***Can some Participants Sign Digitally and Some in Person?***
Yes*, but you* ***MUST*** *select* ***E-Signature*** *as your* ***Signing Method*** *and then, in* ***Step 5,*** *indicate* ***Who Signs Online through DocuSign*** *and* ***Who Signs in Person*** *when you* *Define Each Participant's Action when Receiving the Contract.*

13. **Provide Signing Method, Transaction Type, Offer Type, and Conditional Type**

    13.1. If at least one participant is going to sign digitally, **Select E-Signature** as your **Signing Method***
    13.2. From the **Transaction Type** dropdown**,** select **Purchase Agreement** if it has not been prefilled
    13.3. In the **Offer Type** section**,** select **Conditional**
    13.4. **Define** the **Conditional Type** by clicking **Condition Precedent** or **Condition Subsequent**
    13.5. **Enter** the number of days for the **Grace Period**
    13.6. From the **Agreement of Purchase Contract Template** dropdown, select a **Contract Template**
    13.7. **Click Next**

!! ***WARNING: Make sure your contract has all the fields you need.***
When using ***DocuSign****, the* ***Contract Template*** *that you set up through the* ***Contract Configurator*** *will be automatically* ***Populated*** *with the* ***data*** *you input into the* ***Transaction Manager****. Keep in mind that* ***any fields that are not configured in the template will not appear in the contract, even if you fill out the information in the Transaction Manager.***

!! ***Can't Find Your Purchase Contract Template in the Dropdown?***
You will only see contracts that were added with the *Contract Configurator*.

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14. Step 2 - Provide Participant Information

Introduction

Info:
*There are **Three Types** of **Participants:** The **Purchaser**, the **Purchaser's Lawyer,** and (if applicable) the **Purchaser's Agent**.*

!! ***To Auto-populate the Purchaser's information, you can scan their Driver's License or Passport.***

- *You can Scan it on a Tablet using the tablet's **Camera**.*
- *If you are on a **Computer**, you can Upload a Picture of the License or Passport and Bildhive will auto-fill the fields.*
- *If scanning isn't possible, you can always Enter the Information Manually*

!! ***WARNING. The E-signature Transaction WILL FAIL if the recipient's email address is invalid, so double-check it. There are two Actions users are advised to take:***

- *Log into their **DocuSign Account** and **Activate Event Recipient Autoresponded** to receive **Notifications** in **Bildhive** when a transaction fails due to a **Bad Email Address.***
- *Contact their **DocuSign Account Manager** and ask them to allow the **Envelope Correct Function** so that changes to the **Purchasers'** and the **Reps' Information** can be made directly from **Bildhive** but only while the transaction is **Pending.***

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15. Scan Purchaser's License or Passport on a Tablet

15.1. Click **Add Primary Purchaser**
15.2. From the **Dropdown menu,** select **Scan Driver's License** or **Scan Passport**
15.3. **For the License, click** on the **Front Photo Scan Button**
15.4. Once the **Tablet's Camera** opens up**, Scan** the **Front** and upload it
15.5. **Repeat** this process with the **Back** of the **License**
15.6. **For Passports,** scan the Page where the **Photo appears**
15.7. Click **Next**
15.8. **Review** the **Information in the Add Primary Purchaser's** field and manually adjust or fill in any missing fields
15.9. Click **Add**
15.10. **Repeat** the **Process** until you have the **Purchasers** that you **Need**
15.11. The **Number** of **Purchasers** you can add is **Limited** to the same **Number** of **Purchasers** included in your **Contract Template**
15.12. To **Increase** the **Number** of **Purchasers,** the **Contract Configurator** and **Add** the necessary **Fields**

-

!! ***You don't have a license or passport on hand? It's no problem.***
Follow these steps to [Manually Enter the License, Passport, or Other ID Information.]

!! ***WARNING. The E-signature Transaction WILL FAIL if the recipient's email address is invalid, so double-check it. There are two Actions users are advised to take:***

- *Log into their **DocuSign Account** and **Activate Event Recipient Autoresponded** to receive **Notifications** in **Bildhive** when a transaction fails due to a **Bad Email Address.***
- *Contact their **DocuSign Account Manager a**nd ask them to allow the **Envelope Correct Function** so that changes to the **Purchasers'** and the **Reps' Information** can be made directly from **Bildhive (only while the transaction is Pending).***

!! ***Is the information not coming in Properly?***
*Try **Rebooting** the tablet.*

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16. Upload a Picture of the Purchaser's License from a Computer

16.1. **Click** on **Add Primary Purchaser**
16.2. From the **Dropdown menu,** select **Scan Driver's License**
16.3. **Click** on the **Front Photo Scan Button**
16.4. **Once** your **File Finder** opens up, **Locate the image** of the **Front of the License, Select** it and **Click Open**
16.5. **Repeat** this process with the **Back** of the **License**
16.6. **Click Next**
16.7. **Review** the **Information in the Add Primary Purchaser's** form and manually fill in any missing fields
16.8. Click **Add**
16.9. **Repeat** the **Process** until you have the **Purchasers** that you **Need**
16.10. The **Number** of **Purchasers** you can add is **Limited** to the same **Number** of **Purchasers** included in your **Contract Template**
16.11. To **Increase** the **Number** of **Purchasers,** the **Contract Configurator** and **Add** the necessary **Fields**

!! ***You don't have a license or passport on hand? It's no problem.***
Follow these steps to Manually Enter License, Passport, or Other ID Information.

!! ***WARNING. The E-signature Transaction WILL FAIL if the recipient's email address is invalid, so double-check it. There are two Actions users are advised to take:***

- *Log into their **DocuSign Account** and **Activate Event Recipient Autoresponded** to receive **Notifications** in **Bildhive** when a transaction fails due to a **Bad Email Address.***
- *Contact their **DocuSign Account Manager a**nd ask them to allow the **Envelope Correct Function** so that changes to the **Purchasers'** and the **Reps' Information** can be made directly from **Bildhive (only while the transaction is Pending).***

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17. Manually Enter the Tenant's License, Passport, or other ID Information

17.1. Click **Add Primary Tenant**
17.2. From the **Dropdown menu,** select **Create Manually**
17.3. **Fill in** all the (mandatory) **Fields** in the Form
17.4. Enter a **Driver's License** or a **Passport**
17.5. If these are from a **Foreign Country,** you will need to add a **Birth Certificate, PR, Work Permit, or Other Documents**
17.6. Below the Driver License fields, find the **US/CA Passport, Birth Certificate, PR, Work Permit,** or **Other** tabs
17.7. Select one and fill in the **Information**
17.8. Click **Next**
17.9. If you have **Secondary Tenants,** repeat these steps to add them
17.10. Click **Next**
17.11. Follow these steps to Upload a Copy of the ID to the Supporting Documents
17.12. **Repeat** the **Process** until you have the **Purchasers** you **Need**
17.13. The **Number** of **Purchasers** you can add is **Limited** to the same **Number** of **Purchasers** included in your **Contract Template**
17.14. To **Increase** the **Number** of **Purchasers,** the **Contract Configurator** and **Add** the necessary **Fields**

!! ***If the Purchaser's Data is already in the CRM, you can Autofill their Information.***
Just enter the first few letters of their name into the ***Search For a Contact*** *field, then select the* ***Name*** *from the* ***Dropdown Menu.***

!! ***WARNING. The E-signature Transaction WILL FAIL if the recipient's email address is invalid, so double-check it. There are two Actions users are advised to take:***

- *Log into their* ***DocuSign Account*** *and* ***Activate Event Recipient Autoresponded*** *to receive* ***Notifications*** *in* ***Bildhive*** *when a transaction fails due to a* ***Bad Email Address.***
- *Contact their* ***DocuSign Account Manager*** *and ask them to allow the* ***Envelope Correct Function*** *so that changes to the* ***Purchasers'*** *and the* ***Reps' Information*** *can be made directly from* ***Bildhive (only while the transaction is Pending).***

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Step 3 - Provide Product Details

!! Heads-Up. The fields displayed by your transaction manager may vary from those listed in this document.
*This is because the displayed fields are **Dependent** on the **Fields** that you have **Set Up** in the **Contract Template.***

18. **Provide Unit Details and Dates**

18.1. From the **Select Floor** Dropdown, **Select** a **Floor***
18.2. From the **Select Unit** Dropdown, **Select** the **Unit***
18.3. If a **Suggested Price** was added in the Home Model Configurator, it will appear in the **Suggested Price (MSRP)** field
18.4. Enter the **Closing Date Type (Tarion)**
18.5. Select an **Irrevocable Date*** from the **Calendar**
18.6. If the **Irrevocable Date** is **Not Applicable,** select the **Not Applicable** field
18.7. Select an **Occupancy Date (1st Tentative)*** from the **Calendar**
18.8. Select **Outside Occupancy Date (Tarion)***
18.9. **Save** as **Draft** or click **Next**
18.10. The 15-minute Unit Timer gets activated, and you have **15 Minutes** to complete your **Transaction** before the **Unit** becomes **Available** again
18.11. The **15-minute Unit Timer** appears at the **Top** of your **Screen**
18.12. If it is **Not Possible** to **Complete** your **Transaction** in the **Allotted 15 Minutes,** Save it as a Draft

* Mandatory field.

!! TIP: About Navigating the Calendar
*The **Single Arrow** next to the date **Advances** the calendar **One month** at a time. The **Double Arrow Advances** the calendar **One year** at a time.*

!! About MSRP, Irrevocable Date, and Closing Date

- ***MSRP** is the **Manufacturer's Suggested Retail Price**.*
- ***Offers** cannot be **Canceled** before the specified **Irrevocable Date**.*
- ***The occupancy Date** is the anticipated date that your unit will be ready for you to move in, as agreed between you and your builder. They **can't fall on Holidays or Weekends.***

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19. Save the Transaction as a Draft

19.1. You can **Save** your **Transaction** as a **Draft** at any point after you enter the **Purchaser's Information (Step 2)**
19.2. To **Save** your **Transaction,** go to the **Bottom** of the **Screen** and click **Save As Draft**
19.3. A **Notification** appears indicating the **Draft** was **Successfully Saved**
19.4. Once the **Transaction Window** closes**,** you are redirected to the **All Transactions List,** where your **Transaction Draft** is **Listed**
19.5. If you saved a transaction as a **Draft** after **Step 3,** the 15-minute Unit Timer is **Activated**

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20. Complete, Edit, or Void a Saved Draft

20.1. To **Edit,** or **Void** a **Saved Draft**, **Locate** your transaction on the **All Transactions List** or on the **Drafts List**

20.2. To **Open** the **Lists,** go to the **Top Left** of your screen, **Click** the **Hamburger Icon** (three horizontal lines), then select either **All Transactions** or **Draft**

20.3. Locate the **Draft** on the **List,** and select it to **Complete the Transaction**

20.4. Otherwise, click the **Three-Dot Action Menu,** and select **Edit,** or **Void Transaction**

20.5. If the salesperson can't complete the sale, they **MUST VOID** the saved transaction, **Releasing** the **Property**

!! ***TIP: You Can't Complete Your Saved Transaction Within 15 Minutes? Do this.***

- *Open the **Transaction Draft***
- *At the **Bottom** of the screen, click **Next** until you get to **Step 3***
- ***Save** it as a **Draft** again*
- *The **15-minute Timer** will re-**Activate***

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The 15-Minute Unit Timer

21. About the 15-Minute Unit Timer

21.1. As soon as a **Salesperson** completes **Step 3** of a transaction, **the 15-minute Unit Timer** gets **Activated**

21.2. Once the Timer starts, the **UNIT IS PUT ON HOLD FOR 15 MINUTES** giving the **Sales Team** time to **Finalize** the **Transaction**

21.3. Any member of the team trying to **Transact** a **Unit ON HOLD** will receive a **Notification** message indicating another member of the team is transacting that Unit

21.4. After **15 minutes,** even if the **Status** still appears as **ON HOLD,** if the salesperson **Did Not Complete** the **Transaction,** the unit becomes **Available Again**

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Step 4 – Finalize the Document

22. **Review Details, Select Inclusions, and Check Custom Fields**

22.1. If applicable, **Checkmark** applicable **Inclusions,** if any
22.2. The **Inclusion Options** that appear in this **Section** were set up in the Contract Configurator as Field #1, Field #2, etc.
22.3. **Add-Ons** are pulled from the information entered in the **Inventory Price Manager** or **Condo Unit Configurator**
22.4. **Adjust** Add-Ons **MSPR,** if applicable
22.5. Add or adjust **Purchase Price (Offer)***
22.6. **Review** the **Deposit Structure** and make adjustments, if necessary
22.7. If you have added **Custom Fields**, they will show here
22.8. Click **Next: Signing Order**

* Mandatory field.

!! ***Would you like to Add more options to your Inclusions List?***
Follow these steps to Add Extra Inclusions.

!! ***About Deposit Structure Calculations***
*As a result of the **Deposit Information** input in the **Settings** and the **Product Price** defined in **Step 3**, Bildhive calculates the **Deposit Amounts**, the **Date** for each deposit, and the **Balance Due** on **Closing Date** and displays them in **Step 4**. If necessary, you can **Adjust** the information manually.*

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Step 5 - Set Up Signing Order

Introduction:

In this section you see

- **The option to allow a Sales Rep to review the contract before it is sent**
- **A list of cards, one per Participant**
- **A number to the left of each card, which indicates the order in which the participants will sign the contract**
- **The Additional Recipients button which allows you to add more Recipients**
- **The Sign Route Preview. The icon on the top right of each circle indicates the Action each participant needs to take when they receive the contract. Roll over the icon to see each person's role**

!! ***Do you have Additional Purchasers?***

*The **number** of **signing fields for purchasers** is determined when the **contract** is **configured**. To allow **additional signers**, **add** more **signing fields** in the **Contract Configurator.***

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23. Enable the Sales Rep to Redline the Contract Before Sending to Signers

23.1. To allow a **Sales Rep to Review** and **Make** any **Final Adjustments** to the contract **BEFORE** sending to the **Signers**, go to the top of the section and select **Requires Rep** to **Review Contract**

23.2. Once you select this option, the **Sales Rep** is placed at the **Top** of the **Signing Route** and is assigned **Number Zero** in the **Signing Order**

23.3. The **Sales Rep** gets the contract through their **DocuSign** account

23.4. They can make the necessary **Adjustments** and then send it to the rest of the **Participants** to be **Signed**

!! *Heads Up*

*To **Redline** the **Contract**, you **MUST** have **DocuSign's E-Signature for Real Estate License,** be **Logged i**nto your **Billdhive Account,** and **Integrated** with **Docusign** using the **SAME EMAIL ACCOUNT.***

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24. **Review and Adjust the Signing Order**

24.1. Locate the **Number** to the **Left** of each signer’s card
24.2. If the order needs to **Change, Roll Over** the number and use the up or down **Arrows** to adjust it

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25. **Define Each Participant's Action when Receiving the Contract**

25.1. Use the **Dropdown** menu to the **Right** of the participant's **Name** to select the action they need to take once they receive the contract, including, **Sign**, **Receive a Copy**, **Approve** or **Don't Send a Copy** to this Participant

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26. Create an Access Code to Add an Extra Layer of Security

26.1. Locate the **Card** of the **Participant** to whom you want to assign an **Access Code**
26.2. In the **Access Code** field, enter a **Code**, such as a series of numbers, a word(s), or a combination of letters and numbers
26.3. **Share** the code with the **Participant**
26.4. To **Skip** this step, **Leave** the Access code field **Blank**
26.5. Participants who have been **Assigned** a **Code** must **Enter it** to **Access** the contract
26.6. Participants who **Don't Receive** the **Code** will get a **Notification** to **Contact** the **Sender** (Rep) to request it

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27. **Define who Signs Online and Who Signs in Person**

27.1. At the bottom of each signer's card**, Locate** the **Signing Process** buttons

!! ***Can some Participants Sign Online and Some in Person?***

*Yes, but **ONLY** If you selected **E-Signature** as your **Signing Method** in Step 1.*

*Make sure to indicate **Who Signs Online** and **Who Signs in Person** when you Define each Participant's Action in **Step 5.***

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28. **Add More Recipients**

28.1. Scroll to the bottom of the **Signing Order** section, click **Additional Recipients**, and **Repeat** the previous steps

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29. **Preview the Sign Route**

29.1. The signing route appears on the right side of the screen
29.2. **Roll over** the icon on the top right of each circle to see what **Action** each participant needs to take once they receive the contract
29.3. **Changes** to any information in this preview must be made on the **Participants' Card** to the left of the signing order
29.4. Once the information is correct, **Scroll** to the **Bottom Right** and click **Next: Review and Send**

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Review and Send

30. **!! STOP. Review Your Contract's Size Before Sending**

DocuSign has file size restrictions. Please ensure your document is under 25 MB and no more than 2,000 pages before sending it. If your contract exceeds these limits, it will fail to send.

For more information, click this link to DocuSign's file size limitations or contact your Admin Team at Bildhive for help reducing or optimizing the file.

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31. **Review the Contract's Size, Preview it, and Send it to All the Recipients**

!! ***Be Patient; it Takes a Few Minutes to Generate the Preview of the Contract.***
*Once ready, the preview might open in a new tab. Make sure to **Review** the **Contract Carefully**. To **Navigate** the pages, click the **Thumbnails** on the **Left Navigation Bar**.*

- 31.1. Once the **Preview** of the contract **Opens,** make sure the **Number** of **Pages** is **LESS** than **2,000**
- 31.2. Check the **File Size** by going to the top right corner, and clicking the **Three-Dot Action Menu**
- 31.3. Once the menu Opens**,** select **Document Properties**
- 31.4. On the Document's Properties pop-up, find **File Size**
- **31.5.** If the **Number Is Lower Than 25 Mb**, or 25,000 KB, then the file is **Within** DocuSign's **Limits**
- **31.6.** Then, navigate through the pages to **Review** the **Contract**
- 31.7. Once you are done, close the **Preview Tab**
- 31.8. To **Email** the contract to **All Recipients,** click **Send Contract**
- 31.9. To make **Adjustments,** scroll to the bottom of the screen and click **Back**

!! ***Heads-Up When Using a Tablet***
The Review and Send Screen opens up in a new Tab. Once you finish reviewing, you can close the tab.
*A **Safari** or **Chrome** browser will provide better **Performance**.*

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32. Did You Receive an 'Exceeded Maximum Size' Notification?

32.1. **DocuSign** has a **file size limit** for uploads

32.2. If your **Contract Exceeds This Limit,** you'll receive a **Notification** stating: "**The request size of [#] bytes exceeded the maximum size of [#] bytes.**"

32.3. If you **Encounter This Issue**, please **Contact Us** at support@bildhive.com for assistance.

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Signing E-Signature and Combined Transactions Electronically

33. How to Sign Electronically

33.1. Once the contract is sent, Participants should go to their **Inbox**
33.2. **Open** the email with the words **Via DocuSign** contained in the subject line, and click the **Button** inviting them to **Sign, Review, Approve, etc.**
33.3. They will be redirected to **DocuSign**
33.4. They must **Sign in** if they haven't done so and then follow the **Prompts** to complete their required **Action** (Sign, Review, etc.)

!! ***Emails are sent according to the Sign Route that was defined in Step 5***.
*In the **Detail Tab**, under the **Progress Column**, you can see who has signed, reviewed, etc., and who still needs to sign, review, etc.*

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Signing Combined Transactions in Person

34. **Select the Participants who Need to Sign in Person**

    34.1. Once you send out the contracts, you are redirected to the **Transaction's Detail Page** with the **Documents** tab open
    34.2. If one or more of your participants need to sign in person, find the **Action** column to the right of the **Document,** and click the **Three-Dot Action Menu**
    34.3. From the **Dropdown,** select **Process in Person Signing**
    34.4. The **In-Person Signing Pop-up** opens
    34.5. From the **Select Signer** dropdown**,** select the **Name** of the person who needs to **Sign,** then click **Process**
    34.6. You are **Redirected** to **DocuSign**
    34.7. **Sign in,** if you haven't done so already

!! ***Are all of your Participants signing in Person?***
Then, follow the Print & Sign Signing Method.

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35. **Open DocuSign and Download the Document**

35.1. Once the Document opens in **DocuSign,** go to the **Top Right** and click **Other Actions**
35.2. From the dropdown, select **Print & Sign** and select if you would like to **Upload** or **Fax the Document** once it is **Signed**
35.3. Then **Download** the **Document** and follow the prompts

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36. **Have the in-Person Signers Sign the Document, then Upload or Fax it to DocuSign**

36.1. Have the **Downloaded Document** signed, then click **Return Document,** and follow the prompts

36.2. If it is not possible to sign the document immediately, you will need to repeat **Steps One** and **Two**, then click **Return Document,** and follow the prompts

!! *For contracts with both e-signatures and multiple in-person signees,*
*Please upload **ONLY** the version that includes **ALL THE SIGNATURES**. There's **NO NEED** to **Upload** the version with **Just E-Signatures**.*

!! *Don't forget the Cover Page*
*If you are **Faxing** the **Document**, make sure to include the **Cover Page** provided by **DocuSign**.*

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Add a Purchaser After a Contract has Been Signed

37. Create an Amendment to Add a New Purchaser(s)

37.1. When a **Contract** has already been **Sent** and **Signed**, but you **Need** to **Add** a **New Purchaser(s)**, use the **Contract Configurator** to **Create** an **Amendment** to the APS to **Insert** the number of **New Purchasers** you need (up to 5)

37.2. Once the contract **Template** is **Ready**, open the **Transaction Manager** app

37.3. Locate the **Transaction** in your **Transactions List**, access the **Three-Dot Action Menu** and click **Edit**

37.4. This will open the **Documents Tab** for the selected transaction

37.5. Scroll to the **Amendments Or Documents That Require Approval/Signature** section, and, at the bottom, click **Create Amendment/Document**

37.6. Choose a **Signing Method**

37.7. From the **Dropdown**, **Select** the **Template you** created , select **Amendment** as the **Document Type,** and click **Next**

37.8. **Follow** the **Steps** for the **Signing Method you selected** and finalize the amendment

!! ***Ensure the number of additional signatures specified in the Contract Configurator matches the exact number required and entered in the Transaction Manager.***
*If there are discrepancies, any extra signatures added in the Transaction Manager **WILL NOT APPEAR IN THE FINAL CONTRACT**, even if the Transaction Manager allows you to add them.*

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Navigate to your Transactions

38. The Left Navigation Bar

Introduction:

Your transactions are organized by status as they are created. Use the Left Navigation Bar to filter and access your transactions. The following options are available:

- **All Transactions –** this displays **All** your transactions*
- **Pending –** this displays your **Pending** transactions*
- **Completed –** this lists all your **Completed** transactions*
- **Draft –** Select this option to view a list of your **Drafts***
- **Voided** – Select this option to view a list of the transactions you have **Voided***
- **Archived –** Select this option to view a list of the **Archived** transactions

Once on a list, you can apply **Secondary Filters.** Simply go to the **Top Right** and click **Filters** to open the dropdown with the filtering **Options.**

* These options open in the **Card View** by default, identified by the highlighted **Card View Icon** (orange squares) at the top right of the screen. Click the **List Icon** (squares and rectangles) to the right of it to switch to the **List View**.

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Actions Permitted by Transaction Status

39. Actions Chart
40. You can take **Different Actions** depending on the **Status** of the **Transaction**
41. Check the **Chart** below

Status	VIEW	EDIT!!	ARCHIVE	VOID	DELETE
Draft	x	✓	x	x	✓
Pending	x	✓	x	✓	x
Completed	x	✓	✓	✓	x
Voided	✓	x	✓	x	x
Archived	x	✓	x	x	x

!! ***Transactions can ONLY be edited if they are still PENDING and NO SIGNATURES have been applied.***
Amendments *can be added, and* ***Supporting Documents*** *uploaded at any point****,*** *but it is recommended to do so* ***AFTER*** *the contract has been* ***COMPLETED****.*

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View Transactions Details on the Details Screen

42. **The Transaction's Detail Screen**

Once the contract has been sent, you will be redirected to the ***Transaction's Details Screen****. This screen has several tabs:*

- *Details*
- *Purchasers*
- *Documents*
- *Participants*
- *Notes*
- *Timeline*

Can't see the tabs? Scroll up, as they may be hidden.

The ***Documents*** *tab is selected by* ***Default****. To* ***Navigate*** *between the tabs, click on them.*

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Details Tab

43. View the Transaction Details

- A Summary of the Offer Details
- The Purchasers Details
- The Deposit Structure
- Product Details, including Floorplans
- The labels at the Top Right of the screen provide Transaction Details like All Contracts Signed, Sold, etc.
- At the very top right of the screen, you can Refresh the screen
- Next to the Refresh button, you can **Download** a **PDF** of the Details Screen and the Licence or Passport if scanned
- Add-Ons Details

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Purchaser’s and Rep’s Tab

44. View the Purchasers' and Purchaser Reps’ Details and the Forms and Attachments They Have Submitteds

44.1. Select the **Purchasers & Reps Tab** and locate the **Person** whose **Information** you want to **View**

44.2. To view the **Forms** and **Attachments** the purchaser has submitted, click the **Person Icon**

44.3. To view their **Details**, click the **Eye** Icon

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Documents Tab

45. **Transaction Documents Tab**

Introduction:
All the Documents for this Transaction are Housed in this Tab: the Contract Template (in this case, Agreement of Purchase), any Amendments (documents that require Approval/ Signature), Add-Ons Contracts (Parking Spots, Lockers, and Bike Racks), and Supporting Documents (a passport, if this was used to identify the user).

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46. **Review the Transaction's Information and Documents**

- **Type of Agreement** (in this case, Agreement of Purchase)
- **Offer Type** (in this case, Conditional) top right
- **Document Name** (name of the template used)
- Transaction **Owner**
- **Date** Created
- **Progress** (Delivered, Pending, Completed, Archived, Voided, etc - see note below)
- **Action, if Pending** (Click the Three-dot Action Menu and select to Resend, Void Transaction, Process in Person Signing, or Preview the Contract)
- **Action, if Complete** (Select to Download a signed Zipped file with the pdf of the signed document or to Preview it)
- **Refresh** (at the very top right of the screen)
- **Download PDF** (next to the Refresh button) this downloads a PDF of the Details Screen and attaches the Licence or Passport if scanned)

‼ ***Does the Progress Column show 1/2 Signed or something similar?***
1/2 Signed means** that **One** out of **Two** people has signed**. 2/3 Signed** means that **Two** out of **Three** people have signed**. Hover** over the **Text** to see who **Has Signed** and who has **Not Signed Yet.

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47. Add Amendments and Additional Documents that Require Approval or Signature

Info: *In this section, you can create additional **Documents** that require a **Signature /Review,** such as **Amendments**. These documents are created similarly to transactions.*

47.1. At the bottom of the Amendments section, click **Create Amendment/Document,** then complete the **Three Steps:**

47.2. **Step 1 Choose Template**

- First Select **Signing Method**
- Then, Select the **Document Template*** from the **Dropdown** or, **Configure** it using the Contract Configurator and then select it from the **Dropdown**
- **Fill** in any required **Fields**
- Click **Next**

47.3. **Step 2 Signing Order**

- **Review** and **Adjust** the **Signing Order**
- **Select** whether the participant **Needs to Sign, Receives a Copy, Needs to Approve,** or if they don't need to do any of the above**,** select **Do not Send a Copy to this participant**
- **Add** an **Access Code** if **Necessary**
- Below the participant's email address, locate the **Signing Process Section** and select whether they must sign **Online Through DocuSign** or **in Person**
- **Add** any **Additional Recipients** if **Necessary**
- **Move** the **Slider** to **Preview Signing Route**
- **Hover** over each **Participant** to reveal their **Signing Information**
- Click **Review** and **Send**

47.4. **Step 3 Review and Sign**

- The preview opens in a new Tab**, Review** the **Contract**
- **Close** the **Preview**
- If all is okay, click **Send Contract**
- Otherwise, click **Back** and make the necessary adjustments

* Mandatory field.

!! ***Upload the RECO Forms to this section.***

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48. **How to Upload a Signed Amendment or Document**

48.1. **Scan** the document to your computer or phone using one of the scanning apps (for example, Scanner) and save it as **PDF**

48.2. To **Upload** the pdf of the signed document to the **Transaction Manager,** go to the **Transaction's Detail Screen**

48.3. Ensure you are in the **Documents Tab**, then scroll down to **Supporting Documents**

48.4. At the end of the row, locate the **Action** column, roll over the **Three-dot Action** menu, and select **Upload**

48.5. **Confirm** that the file is the **Signed Copy** of the transaction and **Upload** it under the **Progress** column, the document will appear as **Complete**

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49. **Create Add-Ons Contracts**

Info: *In this section, you can create additional **Documents** for **Add-Ons**. These documents follow the same steps as transactions.*

49.1. Below the Amendments section, click **Create Add-Ons Contract,** then complete the Four Steps:

49.2. **Step 1 Provide Transaction Information**

- **Signing Method*** is **E-Signature or Print and Sign**
- **Select Offer Type***
- If already configured, Select the **Agreement of Purchase Contract Template*** from the **Dropdown** otherwise, **Configure** it using the Contract Configurator and then select it from the **Dropdown**
- Click **Next**

49.3. **Step 2 Provide Participant Information**

- **Provide Purchaser(s)**
- **Purchaser's Reps**
- **Purchaser's Tags** (if applicable)
- Click **Next**

49.4. **Step 3 Provide Add-On Details**

- Add-On(s) **Number**(s) and **Price(s)**
- **Enter** Add-Ons **MSRP**
- **Enter Closing Date Type (Tarion), Occupancy Date* (1st Tentative), Irrevocable Date*, Outside Occupancy Date (Tarion)***
- Click **Next**

49.5. **Step 4 Finalize Document**

- Review and if all is Okay
- Click **Next: Review & Download**

49.6. **Download, Sign, and Upload the Signed Document**

- **Download** the **Document**
- **Print** the downloaded document
- Have it **Signed** by all parties
- Upload the Signed Document

* Mandatory field.

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50. **How to Upload a Signed Contract**

50.1. **Scan** the document to your computer or on your phone using one of the scanning apps (for example, Scanner) and save it as **PDF**
50.2. To **Upload** the pdf of the signed document to the **Transaction Manager,** go to the **Transaction's Detail Screen**
50.3. Make sure you are in the **Documents Tab**, then scroll down to **Supporting Documents**
50.4. Locate the **Action** column, Roll over the **Three-dot Action Menu,** and select **Upload**
50.5. **Confirm** that the file is the **Signed Copy** of the transaction and **Upload** it
50.6. Under the **Progress** column, the document will appear as **Complete**

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51. **Add, Download, and Delete Additional Supporting Document Templates**

51.1. To add a **Supporting Document Template,** go to the bottom of the section and click **Add Document**
51.2. In the **Create Supporting Document** pop-up, click **the Dropdown** and select a **Template**
51.3. Click **Review & Create**
51.4. In the **Document Type** section**, Select Amendment** or **Document**
51.5. Fill in the **Information** if necessary
51.6. Click **Review and Create**
51.7. **Review** the **Document** and click **Save Document**
51.8. To **Download/ Delete,** locate the document in the **Supporting Documents List**
51.9. At the **End** of the row, click the **Three-dot Action Menu** and **Select Download/Delete**
51.10. To delete in **Bulk,** select more than one **Document,** and, at the **top right,** click **Bulk Actions** and select **Delete Selected Documents**
51.11. Confirm **Delete**

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52. Upload, Download, Print, Delete, or Preview Additional Supporting Documents

52.1. To **Upload** a file, go to the **Top Right** of the **Supporting Documents** section
52.2. Click **Upload File**
52.3. **Select** a **File** from your computer (like a picture or copy of a passport)
52.4. Click **Open**
52.5. To **Download, Print, Delete,** or **Preview,** locate the document in the **Supporting Documents List**
At the **End** of the row, click the **Three-dot Action** menu, and **Select** an **Action**
52.6. To **Delete** or **Download** in **Bulk,** select more than one **Document**
52.7. At the **Top Right** of the section, the **Bulk Actions** button appears
52.8. Click and select **Delete** or Download **Documents**
52.9. Confirm **Delete**
52.10. A **Zipped File** of the downloaded documents appears in your **Downloads Folder**

!! ***You can upload a picture or scan of the purchaser's ID here.***

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Internal Participants Tab

***Info:* *Internal Participants* are the *Default Participants* that *Sign* the document.**

53. **View and Edit Internal Participants**

   53.1. **To Edit or Delete** an **Internal Participant,** locate their **Card**
   53.2. **Click** the **Three-Dot Action Menu**
   53.3. To **Update Participant's information**, select **Edit**, adjust the info, and click **Update**
   53.4. **Updates** will be reflected in all **New Transactions** and all the **Pending** transactions in which the participant participated as long as these have **No Signatures** yet
   53.5. You can also **Change** the **Internal Participant's Information** from Settings

‼ ***Things to Know About Editing the Internal Participant's Info.***

- *The **TRANSACTION OWNER** is the **ONLY** person who can **Edit** the **Information** about **Internal Participants***
- ***DocuSign** has to have the **Envelope Correct Function** enabled*
- *Transactions need to be **Pending** and have **No Signatures***
- *Adjustments can't be made to **Transactions** that are **Completed** or that are **Pending** and have **Signatures.** You'll need to create an amendment in order to indicate any changes.*

‼ ***Why is it Locked?***

***Transaction Owners** cannot be **Edited**.*

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Notes Tab

***Info:** The Notes tab allows you to make Notes. They will be Listed with their subject and the date they were created.*

54. **Add, Edit, and Delete Notes**

54.1. To **Add** a **Note, Click** on **Add New Note**
54.2. In the **Add New Note Pop-up, Provide a Subject***
54.3. Fill in the **Body** of the note
54.4. **Click Create**
54.5. To **Edit** a note, **Locate** the **Note** in the **Notes List**
54.6. **Click** on the **Pencil Icon** at the end of the **Row,** make the edits, and click **Update**
54.7. To **Delete** a note, click on the **Delete Icon** and confirm **Delete**

* Mandatory field.

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Timeline Tab

55. See the Activities of this Transaction

Info: *This Tab displays a **Detailed Timeline** of this transaction's activities from the time the transaction was created.*

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Edit Transactions

!! ***Transactions can ONLY be edited if they are still PENDING and NO SIGNATURES have been applied.***

***Amendments** can be added, and **Supporting Documents** uploaded at any point, but it is recommended to do so **AFTER** the contract has been **COMPLETED**.*

56. Edit Pending Transactions with No Signatures

56.1. In these instances, an **Edit** button appears at the **Top Right Corner** of the screen

56.2. **Clicking** on the button will bring you back to **Step 1** of the **Transaction Process**

56.3. **Complete** the **Steps** with the **Adjusted Information**

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Print & Sign (signing method)
Any Type of Agreement
Any Type of Offer

!! ***Download, Print, Scan, Sign, and Upload***
*To use the **Print & Sign** signing method, you must **Download** the **Completed Agreement**, get all parties to **Sign** it, then **Scan** the **Document** to your **Computer**, and **Upload** the scanned signed document to **Bildhive.***

57. Prepare a Document for the Print and Sign Signing Method

57.1. You **Do Not Need to Integrate** with **DocuSign**
57.2. In **Step 1**, select **Print and Sign** as the **Signing Method**
57.3. In **Step 2**, **Add the Tenant's** and **Reps' information**
57.4. In **Step 3**, provide **Product Details** including **Dates**
57.5. **In Step 4,** enter **Inclusions, Pricing, Deposit Structure, and** other necessary information, then click **Next: Review & Download**
57.6. **Review** the contract carefully and click **Create Transaction**

!! ***Don't Forget***
*You must DOWNLOAD THE DOCUMENT and get it **Signed** by all **Parties.***

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58. Download the Document to be Signed by all Parties

58.1. To **Download** the main document, make sure you are in the **Documents tab,** locate the **Document** in the list of documents**,** go to the **Top Right,** and select **Download**

58.2. **Print** the downloaded document

58.3. Have it **signed** by all parties, then, Upload the Document

58.4. To **Download** any other document, make sure you are in the **Documents tab,** locate the **Document** in the list of documents**,** go to the **Action Column, click the Three-Dot Action Menu,** and select **Download**

58.5. **Print** the downloaded document

58.6. Have it **signed** by all parties, then, Upload the Document

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59. **Upload a Signed Document**

59.1. **Scan** the document to your computer or on your phone using one of the scanning apps (for example, Scanner) and save it as **PDF**
59.2. To **Upload** the pdf of the signed document to the **Transaction Manager,** go to the **Transaction's Detail Page**
59.3. Make sure you are in the **Documents Tab** and scroll down to the **Document**
59.4. At the end of the row, locate the **Action** column, click the **Three-dot Action** menu, and select **Upload Signed Contract**
59.5. **Select the Signed Copy of the Document and click Upload**
59.6. On the **Confirm Upload** pop-up**,** click **Continue**
59.7. Once uploaded, the document will appear as **Complete** under the **Progress** column

!! ***Stop. Confirm Before you Upload.***
*Make sure the file you are uploading is the **Signed Copy** of the transaction.*

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Access your Transactions from the Left Navigation Bar

Introduction:

From the left navigation menu, you can access your settings and the different Transactions Lists, which include:

- **All Transactions** (where all your transactions are Listed)
- **Pending** (Transactions that have been sent and are in the process of being signed)
- **Completed** (where your fully signed transactions are Listed)
- **Drafts** (where your Saved Drafts are Listed)
- **Voided** (where your Voided transactions are Listed)
- **Archived** (where you can see a list of your Archived transactions and notes explaining the reasons why they were archived)

60. **Open the Left Navigation Bar**

    60.1. To **Open** the left **Navigation Bar**, go to the Top Left of the screen and click the **Hamburger** menu (Three horizontal lines)

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61. **Switch from the Card View to the List View**

61.1. By **Default**, the transactions lists open in the **Card View**
61.2. To switch to the **List View**, go to the **Top Right Corner** of the screen and click the **List View** Icon
61.3. Unlike the **Card View**, which uses the **Load More** button at the bottom of the screen to **View More Transactions**, the **List View** uses the **Page Navigation Menu** at the **Top Right** of the screen
61.4. To select **How Many Transactions** to **Display** on a **Page** in the **Card View**, click the **10/page Dropdown** and **Select** a **Number**

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62. **Rearrange the Order in which your Transactions Appear in the Lists**

62.1. To change the order in which the Transactions are listed, go to the **Top Right** of your screen

62.2. Locate the **Newest First** dropdown

62.3. Click and **Select** one of the following **Options**:

- Newest First
- Oldest First
- Price: Low to High
- Price: High to Low
- Unit Order Ascending
- Unit Order Descending
- Status in Ascending (Completed, Pending, Draft, Voided)
- Status in Descending (Voided, Draft, Pending, Completed)

!! ***Tip. The 'List View Doesn't Show the 'Newest First' Dropdown.***

*So, **FIRST** Select the **Order** you wish to view on the **Card View**, then switch to the **List View**.*

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63. **Download Transactions in Bulk**

63.1. To **Download Some** or **All** of the **Transactions** in the All, Pending, Completed, Draft, or Voided Transactions Lists, open the List that contains the transactions you wish to download

63.2. To **Download All** the transactions, go to the **Top Left** of the **Screen**, click the **Bulk Action** dropdown, and select one of the **Download** options

63.3. You will receive a **Link** to download the selected transactions **Via E-mail**

63.4. **Click** on the Link to **Download** the **Zipped** file containing your requested downloads

63.5. Downloads include a **CSV** of any **Forms** submitted, the **APS**, **Legal Information,** and **any Amendments or Docs** that **Require a Signature**

63.6. Completed **E-Signature Transactions** include the **Certificate of Completion** from **DocuSign**

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Date	*Reviewer*	*Status*	*Activities*
Feb 3/2023	Gildie	Done	☑ ~~Add Header and Footer.~~ ☑ ~~Insert Table of Contents~~ ☑ ~~Insert Back to Table of Contents~~ ☑ ~~!! double and not in italics~~ ☑ ~~*For **Optimal Performance**, please follow our Asset Preparation Guidelines when preparing your assets.*~~ ☑ ~~Three-dot instead of three-dot~~ ☑ ~~Make sure to say List instead of Menu: Highlight List, Amenity List, etc~~ ☑ ~~Change intro for Introduction~~ ☑ ~~Add get started as a title for Launch~~ ☑ ~~Turn Info headlines to gray~~ ☑ ~~Check table of contents links~~ ☑ ~~Check relevance with App.~~ ☑ ~~Check spelling~~ ☑ ~~Check continuity of numbers~~ ☑ ~~Update Last Edited~~ ☑ ~~Add Internal Links page 10,~~
Feb 06/2023	Nancy & Gildie	Done	☑ ~~Review with Nancy~~
May 01/2023	Jay	Done	☑ ~~Entered into Freshdesk~~
Jul 17, 2023	Gildie	Done	☑ ~~Update the Document with the editions done to Chapter 4~~
Jul 26, 2023	Gildie	Done	☑ ~~Added the warning about the number of purchasers not exceeding number input in contract config.~~ ☐ Relink Inclusion Info
	Jay	Not started	☐ Ready for Jay to Upload the complete Article to Freshdesk ☐ if already refreshed the article, please add new sections in steps 6, 13,14,and 15
		Not started	☐ Update Last Edited
July 27	Jay	Done	Added to freshdesk latest changes
		Not started	

Oct 9, 2024	Gildie	Done	**Get Started** ☑ ~~Introduction~~ **Define Your Settings** ☑ ~~Integrate with DocuSign~~ ☑ ~~Add, Edit, and Delete Default Participants or Signers~~ ☑ ~~Adjust a Default Participant's Info After You've Sent the Document~~ ☑ ~~Seller's Agents - Complete or Adjust RECO Information Guide and Self-Represent form~~ ☑ ~~Set Irrevocable Date Limits~~ **E-Signature and Combined E-Signature+In-Person/ Purchase Agreement / Conditional Offer** ☑ ~~Grace Period and Agreement Status – Pending, Void, Sold Conditional, and Sold/Complete~~ **Step 3 - Provide Product Details** ☑ ~~Complete, Edit, or Void a Saved Draft~~ **Step 5 - Set Up Signing Order** ☑ ~~Introduction~~ **Navigate to Your Transactions** ☑ ~~The Left Navigation Bar~~ **Actions Permitted by Transaction Status** ☑ ~~Actions Chart~~ **Documents Tab** ☑ ~~Add Amendments and Additional Documents that Require Approval or Signature~~ ☑ ~~Upload, Download, or Delete Additional Supporting Documents~~ **Purchaser's and Rep's Tab** ☑ ~~View and Edit Purchaser's and Purchaser's Reps' Info~~ **Access your Transactions From the Left Navigation Bar** ☑ ~~Download Transactions in Bulk~~
Oct 23, 2024	Gildie	Done	☐ **I added the following to the tasks:** **Review and Send** ☐ Did you Receive an "Exceeded Maximum Size" Notification? **Signing Combined Transactions in Person** ☐ Have the in-Person Signers Sign the Document, the Upload or Fax it to DocuSign

Last Edited Dec 17 /2024

Oct 28, 2024	Gildie	Done	**Review and Send** ☑ ~~**I deleted the Exceed Notification section and added the** !! STOP. Review Your Contract's Size Before Sending~~ ☑ ~~**Adjusted the** Preview the Contract's Size, Preview it, and Send it to All the Recipients **section**~~
Nov 18, 2024	Gildie	Done	☑ ~~Introduction~~ ☑ ~~Enable the Sales Rep to Redline the Contract Before Sending to Signers~~ ☑
Dec 12, 2024		Done	☑ ~~Adjust the section about editing default participants in pending contracts.~~ ☑ ~~Add other forms of ID~~ ☑ ~~Move the Documents Tab to reflect the order of the App~~ ☑ ~~Instuctions on how to add Purchasers after the contract has been signed~~ ☑ ~~Adjusted the Settings~~
Dec 17, 2024		Done	☑ ~~Adjust the section about editing default participants in pending contracts~~ ☑ ~~**Actions chart**~~ ☑ ~~**Left Nav**~~ ☑ ~~**Purchasers & Reps tab**~~
Dec 17, 2024	Nancy/ Jay	Done	☑ ~~**Request Jay to Adjust the following in FD:**~~ **Get Started** ☑ ~~Introduction~~ **Define Your Settings** ☑ ~~Integrate with DocuSign~~ ☑ ~~You MUST READ this before using the E-Signature Signing Method~~ ☑ ~~Transaction Default Settings-Irrevocable and Cooling Off Dates~~ ☑ ~~Add Deposit Structures~~ ☑ ~~Add-Ons Deposit Structure~~ ☑ ~~Add, Edit, and Delete Default Participants or Signers~~

Last Edited Dec 17 /2024

			☑ ~~Adjust a Default Participant's Info After You've Sent the Document~~ ☑ ~~Seller's Agents - Complete or Adjust RECO Information Guide and Self Represent form~~ **E-Signature and Combined E-Signature+In-Person/ Purchase Agreement / Conditional Offer** ☑ ~~Grace Period and Agreement Status – Pending, Void, Sold Conditional, and Sold/Complete~~ **Step 2 - Provide Participant Information** ☑ ~~Scan Purchaser's License or Passport on a Tablet~~ ☑ ~~Upload a Picture of the Purchaser's License or Passport from a Computer~~ ☑ ~~Manually Enter the Purchaser's License, Passport, or other ID Information Information~~ **Step 3 - Provide Product Details** ☑ ~~Complete, Edit, or Void a Saved Draft~~ **Step 5 - Set Up Signing Order** ☑ ~~Introduction~~ ☑ ~~Enable the Sales Rep to Redline the Contract Before Sending to Signers~~ **Review and Send** ☑ ~~!! STOP. Review Your Contract's Size Before Sending~~ ☑ ~~Preview the Contract's Size, Preview it, and Send it to All the Recipients~~ **Signing Combined Transactions in Person** ☑ ~~Have the in-Person Signers Sign the Document, the Upload or Fax it to DocuSign~~ **Navigate to Your Transactions** ☑ ~~The Left Navigation Bar~~

			Actions Permitted by Transaction Status [ ] Actions Chart **Add a Purchaser After a Contract has been Signed** [x] ~~Create an Amendment to Add a New Purchaser(s)~~ **Documents Tab** [x] ~~Add Amendments and Additional Documents that Require Approval or Signature~~ [x] ~~Upload, Download, or Delete Additional Supporting Documents~~ [x] ~~Move the documents tab to reflect the order of the app~~ **Purchaser's and Rep's Tab** [x] ~~View the Purchaser's and Purchaser's Details and the Forms and Attachments they have Submitted~~ **Internal Participants Tab** [x] ~~View and Edit Internal Participants~~ **Access your Transactions From the Left Navigation Bar** [x] ~~Download Transactions in Bulk~~ **Navigate to Your Transactions** [x] ~~The Left Navigation Bar~~ **Actions Permitted by Transaction Status** [x] ~~Actions Chart~~ **Edit Transactions** [x] ~~Edit Pending Transactions with No Signatures~~
28 Mar 2025	Jay	Done	[x] ~~**Updated latest changes into the freshdesk**~~