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Manage your Product Inventory and Pricing with the Inventory and Price Management App – High Rise Projects

‼️ ***STOP: Don't Use the Inventory and Price Management App Until***
*You've configured the **Units** with the [Condo Unit Configurator]() and the **Condo Grid** with the [Condo Grid Configurator.]()*

Introduction:

The Inventory and Price Management App is a powerful tool for managing inventory and prices in real-time and across all touchpoints (web, mobile, and sales center devices). With this App you can:

- **Provide inventory availability and status on websites, and sales center devices**
- **Segment inventory according to real-time status (Available, Sold, Hold, Sold Conditional, Not Released)**
- **Change availability status and control how and when to release your product into the market**
- **Control and modify the price of Units, Unit Premiums, Unit Add-Ons Etc.**
- **Assign and Commission Units to VIP Realtors and Manage Worksheets**

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The Inventory and Price Management (IPM)

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Commission and Allocation History

Get Started

1. **Launch the Inventory and Price Management (IPM) App**

    1.1. Go to the project's **Workplace,**

    1.2. Under **Customer & Transaction Management,** find the **Inventory & Price Management App** and **Select it**

    1.3. You will be redirected to the **Unit Inventory Management Screen**

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Introduction:

Purchasers can reserve their lots/ units through Bildhive. Reservations fall into three categories:

- No-agreement Reservations
- Reservations with Agreement but **NO** Reservation **FEE**
- Reservations with Agreement and a Reservation **FEE**

Use the Reservation Fee Settings to define the Details, including amount and currency.

Occasionally, the builders opt to provide a partial or full refund of the reservation fee to a buyer if their reservation doesn't result in a final purchase. **Choose between Full, Partial, or No Refund options for reservations that did not result in a purchase. Options include the percentage or dollar amount, the currency, and the amount that goes to the Purchaser.**

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Settings – Direct and Worksheet Reservation

2. **Fee & Refund**

   2.1. To set the **Reservation Fee**, go to **Left Navigation Bar** and select **Settings**
   2.2. Under **Direct & Worksheet Reservation Settings,** select **Fee & Refund**
   2.3. First, set your **Reservation Currency** by clicking on the dropdown and selecting **$USD** or **$CAD**
   2.4. Enter your **Reservation Fee** amount
   2.5. In the **Reservation Refund** section,
      - Choose either **Percentage** or **Amount** as the **Refund Fee Commission Type**
      - Enter the value for the **Refund Fee Commission**
   2.6. The **Refund Fee Commission Amount** and **Purchaser Refund Amount** will be calculated automatically
   2.7. **Save** your selections

‼ ***You don't need to repeat this for each unit.***
*This fee becomes the **Default** for all **Reservations** requiring a fee but can be **ADJUSTED INDIVIDUALLY** if needed.*

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3. Payment Integration – Connect with Stripe

!! Heads-Up

*To **Receive** the reservation fee **Payment**, the **Builder/Owner** of the account **MUST** integrate with **Stripe**.*

3.1. From the **Left Navigation Bar,** click **Settings**
3.2. On the **Submenu**, under **Direct & Worksheet Reservation Settings,** select **Payment Integration**
3.3. If you are not **Integrated** with **Stripe** yet, click **Integrate with Stripe** and follow the **Prompts**
3.4. If you have **Problems or Concerns,** contact support@bildhive.com

!! What is Stripe?

***Stripe** is a **Payment Platform** that lets businesses **Accept** credit cards, debit cards, and popular **Payment Methods** around the world*

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4. Email Notification - Select Users to Notify

4.1. To select which users will be notified when a reservation comes in, go to the **Left Navigation Bar** and click **Settings**
4.2. On the **Submenu**, under **Direct & Worksheet Reservation Settings,** select **Email Notification**
4.3. From the **Email Notification Users** dropdown, select the user(s) who will receive an email notification

* Mandatory fields.

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5. Release - Mutual Release Toggle

Introduction:

The builder can request a Mutual Release Agreement for Releasing a Reservation or allow the unit to be released without one.

5.1. To require a mutual release to VOID a reservation, go to the **Left Navigation Bar** and click **Settings**

5.2. In the **Submenu**, under **Direct & Worksheet Reservation Settings,** select **Release,** then choose:

- **YES** to require a mutual release, or
- **NO** to void the reservation without a release

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6. **Grace Days - Apply a Grace Period**

Introduction:

The builder can implement a Grace Period for the Reservation, enabling the Automatic Release of the unit if an offer fails to be completed within the Specified Timeframe.

1.1. To set a Grace Period after which the unit will be released if an offer is not received, go to the **Left Navigation Bar** and click **Settings**

1.2. In the submenu, under **Direct & Worksheet Reservation Settings,** select **Grace Days,** then choose:

- **YES** to apply grace days to the Reservation and enter the number of days, or
- **NO if no grace period should be applied**

!! ***If no Grace Period is applied, team members MUST MANUALLY VOID the reservation to make the unit available.***

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7. **Email Sender - Choose a Sender Address**

Introduction

In this section, builders can specify the originating email address for the reservation process.

7.1. To specify the originating email address for the reservation process, go to the left navigation bar and**,** select **Settings**

7.2. In the submenu, under **Direct & Worksheet Reservation Settings,** select **Email Sender**

7.3. In the **Select a Sender Email Address** dropdown**,** select either the default, no-reply address, or another available address

7.4. Click the **Sender Logo** field-to the right of the main stage**-** and upload a logo from your **Media Library**

7.5. Then, click **Save**

!! Can't find the Email Address you need?

Go to the Broadcast Email Builder App>Settings to configure or verify the address of your choice.

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Settings – Commission

8. Agent Commission Structure - Define the Amount and Type

Introduction

Builders can specify a Commission Amount payable to agents for specific units. The commission structure may be configured as a Percentage of the sale amount or as a Fixed Fee in dollars.

8.1. To set the **Agent Commission Structure**, go to the **Left Navigation Bar** and click **Settings**

8.2. In the **Submenu**, under **Commission Settings,** select **Agent Commission Structure**

8.3. In the **Commission Fee Structure** section**,** choose either
- **Units Plus Add Ons,**
- or **Individual**

8.4. In the **Reservation Fee field,** enter an amount

8.5. If you select **Units Plus Add-Ons**,
- Choose either **Percentage** or **Amount** as the **Commission Fee Type**
- Enter the value for the **Commission Fee**

8.6. If instead you selected **Individual** as the **Commission Fee Payable Choice**,
- Choose either **Percentage** or **Amount** as the **Unit Commission Fee Type**
- Enter the value for the **Unit Commission Fee Amount**
- Toggle the **Is Active** slider to enable or disable this option off
- Select either **Percentage** or **Amount** as the **Add-On commission Fee Type**
- Enter the value for the **Add-On Commission Fee Amount**
- Toggle the **Is Active** slider to enable or disable this option off

8.7. **Save** your selections

!! ***This becomes the default commission structure for all units but can be adjusted individually as needed.***

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9. **Agent Payout Structure – Establish the Rules**

Introduction

Builders can define commission payout details, including Date, Stage, Percentage, or Amount

9.1. To set the **Agent Payout Structure**, go to the **Left Navigation Bar** and click **Settings**

9.2. To set the **Agent Payout Structure**, go to the **Left Navigation Bar** and click **Settings**

9.3. In the **Submenu**, under **Commission Settings,** select **Agent Payout Structure**

9.4. At the bottom of the main stage, select **Add New Payout**

9.5. In the **Add New Payout** pop-up:
- Under **Payout Type**, select **Date** or **Stage**
  - If you selected **Date,** specify the **Payout Date** by entering the number of days after the offer date
  - If you selected **Stage**, choose either **Execution** or **Closing** from the **Payout Stage** dropdown

9.6. In the **Amount Type** section:
- Choose either **Percentage** or **Amount**
- Enter the **Payout amount**

9.7. Click **Create**

* Mandatory fields

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10. **Agent Payout Structure – Edit or Delete**

10.1. To **Edit** or **Delete** the **Agent Payout Structure**, go to the left navigation bar and click **Settings**
10.2. In the submenu, under **Commission Settings,** select **Agent Payout Structure**
10.3. In the payout list on the main stage, locate the **Agent Payout** you want to modify
10.4. To **edit:**
- On the right side, click the **Pencil** icon
- In the **Edit Payout** pop-up, make the necessary changes
- Click **Update** to save

10.5. To **delete**:
- On the right side, click the **Trash** icon next to the payout entry you want to remove

10.6. Then**, Confirm** when prompted

* Mandatory fields

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Settings - General

11. **Add New Tags to the Tag List**

    11.1. go to the left navigation bar and click **Settings**
    11.2. In the submenu, under **General Settings,** select **Tags**
    11.3. In the **Tags List, Locate** the **Add Tag** button at the **Bottom** of the list
    11.4. **Enter** a **Name**
    11.5. Click **Update**
    11.6. The **New Tag** now **Appears** in the **Tags Dropdown**

!! ***Heads-Up***
These Updates *are reflected* ***Across*** *the* ***Platform****.*

Info: ***How to Get Back to the Unit List***
To go back to the ***Unit List****, go to the* ***Left Navigation Bar*** *and select* ***Unit Inventory.***

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12. Edit the Names of Tags in the Tags List

12.1. To **Edit** a Tag, go to the **Left Navigation Bar** and **Select Settings**
12.2. On the **Submenu**, under **General Settings,** select **Tags**
12.3. The **Tags List** will **Display**
12.4. **Locate** the **Tag** you want to **Edit**
12.5. Click on the **Pencil Icon** to the **Right** of the name
12.6. **Enter** a **New Name**
12.7. Click **Update**

‼ ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****.*

Info: How to Get Back to the Unit List
To go back to the ***Unit List****, go to the* ***Left Navigation Bar*** *and select* ***Inventory Management.***

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13. **Remove Tags from the Tags List**

13.1. To **Remove** a Tag, go to the **Left Navigation Bar** and **Select Settings**
13.2. On the **Submenu**, under **General Settings,** select **Tags**
13.3. The **Tags List** will **Display**
13.4. **Locate** the **Tag** you want to **Remove**
13.5. Click on the **Trash Icon** to the **Right** of the name
13.6. **Confirm Delete**

!! ***STOP Before you Remove a Tag***
When you remove a tag from the Tag List, it is removed from all the Units containing it. ***These Updates*** *are reflected* ***Across*** *the* ***Platform****.*

Info: ***How to Get Back to the Unit List,***
To go back to the ***Unit List****, go to the* ***Left Navigation Bar*** *and select* ***Inventory Management.***

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Inventory Management

14. **The Unit Inventory- Introduction**

    This screen is divided into the **Navigation Bar** to the left and the **Main Stage** to the right**.**

    The **Left Navigation Bar** allows you to navigate to
    - **Unit Inventory**
    - **Add-ons Inventory**
    - **Price Management**
    - **Price History**
    - **Settings**

    Those with Premium Packages also have the option to navigate to
    - **Commission & Allocation Management**
    - **Commission & Allocation History**

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15. **Unit Inventory - Card View**

By default, the **Unit Inventory** opens in **Card View**. In this view, the main stage is divided into **Three Sections:**

- **Overview**
- **Unit Status Rectangles and Filters**
- **Unit List organized by Cards**

The Unit List displays the different Units and their details sorted numerically. Each card provides detailed information about the unit, among other things:

- *Unit Number*
- *Unit Tags*
- *Status*
- *Unit Code*
- *Marketing Name*
- *Unit Price*
- *Price per Sq. Ft.*
- *Commission*
- *# of Storeys*
- *Floor Level*
- *Interior Sq. Ft.*
- *Exterior Sq. Ft.*
- *Exposure*
- *# of bedrooms*
- *# of bathrooms*
- *Den?*
- *Loft/ Second Level?*
- *Terrace?*
- *Unit Premiums*

To Switch from the **Card View** to the Floorplate View, just go to the **Top Right** of the screen and click the **Floorplan Icon** (middle icon). This displays the units **Within Their Floorplates**. Alternatively, select the Floor View (right-most icon) to display the units **Organized By Floor**.

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16. **The Unit Inventory - Floorplate View**

In the floorplate view, **Units** in the inventory are **Arranged Within their Respective Floorplates**, distinguished by color according to their **Status**, and sorted by **Floor**.

In this view, you can apply different filters, among others,

- Price
- Number of Beds
- If they have a Den
- Number of Baths
- Square Footage
- Exposure

Clicking on a unit opens the **Unit Details Pop-Up** where you can find all the **Information** related to the unit and **Initiate a Transaction**.

!! How to access the Floorplate View:

*From the **Unit Inventory** page, go to the **Top Right** and click the **Floorplate Icon** (middle Icon).*

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17. The Unit Inventory - Floor View

The floor view displays a list of all the **Floors** and their respective units. The **Unit Cards** are colored according to the **Status**. You can filter the units by **Status**. To the right of the status rectangles, click **Display**, then slide the **SQFT** slider to the right. Each unit card dynamically adjusts its length according to the **Square Footage**, with larger numbers resulting in longer cards.

- Click on the **Three-Dot Action Menu** on the right of each unit card to either **Update Status** or **Make a Transaction**
- Click on a **Unit** to open its **Details Pop-Up**

!! How to access the Floor View:

*From the **Unit Inventory** page, go to the **Top Right** and click the **Floor Icon** (right-most Icon).*

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Unit Inventory Overview

Info: *This section is located at the **Top** of the screen in both the Card view and the **Floor View** and provides an **Overview** of the **Units** in your High-Rise community. It is arranged by **Status** and is **Updated** in **Real Time**. At a glance, you see the following:*

- *Total Units*
- *Units Available*
- *Units Sold*
- *Units on Hold*
- *Sold Conditional*
- *Not Released*
- *Units Allocated*
- *Approved for Reservation*
- *Units Reserved*

*This information is populated with the information you entered with the **Condo Unit** and **Condo Grid** configurators.*

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Filter Unit Cards

***Info:* About the Unit Cards,**
*In the card view, the main elements are the **Unit Cards**. These display the different Units and their details. By default, **All Unit Cards** are displayed and sorted numerically. **Use Filters** to display only **Certain Units**.*

18. **Filter the Unit Cards by Status**

    18.1. Locate the **Colored Rectangles** above the **Unit Cards**
    18.2. Checkmark **One or More** of the **Status Rectangles**
    18.3. Only the **Units** that **Align** with your **Criteria** are **Displayed**

!! *Are Units in Draft Mode Listed in the Inventory Price Manager?*
*Yes. Even if a **Unit** is saved in **Draft Mode** in the **Condo Unit Configurator**, it appears as **Available** in the **Inventory Price Manager**, but it is **Not Visible** in your **Touchpoints** (website, touchscreen, etc.) until it is **Published**.*

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19. **Filter the Units by Realtors/ Asignees, Type (Condo Unit or Condo Town), Price, Square Foot, Bedrooms, Baths, Floor Level, Exposure, Exterior, and Unit Tags**

19.1. **Locate** the **Filters Button** to the **Right** of the **Colored Rectangles** and **Select** it
19.2. The **Filters Drawer Opens**
19.3. **Define** your **Filter Criteria**
19.4. **Click Apply**

!! ***Do you Want to Define a Price Range?***
*Enter a **Price** on the **Left** to set the **Lower** marker and on the **Right** to set the **Higher** marker.*

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Edits Done from the Unit Card

*Some **Edits** can be done from a **Unit Card**, like **Adding** or **Removing Tags**, **Changing** the **Status**, **Initiating** a **Transaction,** and **Updating** the **Unit's Info**.*

20. **Remove Tags from a Unit**

    20.1. To **Remove** a **Tag** from a Unit, **Select** the **Card View**
    20.2. **Locate** the **Unit Card**
    20.3. At the **Top** of the **Unit Card,** find the **Tag(s) Field**
    20.4. Locate the **Tag** that you want to **Delete** and **Click** the **X** next to the name
    20.5. The **Tags** will be **Updated**

!! ***Heads–Up***
***These Updates** are reflected **Across** the **Platform**. Units that are **SOLD** are **Locked** and their information **Can't be Updated**.*

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21. **Add a Tag to a Unit**

    21.1. To **Add** a **Tag** to a Unit, **Select** the **Card View**
    21.2. **Find** the **Unit Card**
    21.3. At the **Top** of the **Unit Card,** find the **Tag(s) Field**
    21.4. **Click** the **Tag Field** to **Display** the **Tags Dropdown Menu**
    21.5. Locate the **Tag** that you want to **Add** and **Select it**
    21.6. The **Tags** will be **Updated**

!! ***Heads–Up***

- *These **Updates** are reflected **Across** the **Platform**.*
- ***Sold,** and **Conditional Units** can't have any tags added to them.*
- *If the **Tag** you need is not in the **Dropdown Menu**, you must **Add** it to the **Tag List**. Follow these steps.*

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22. **Bulk Actions: Add a Tag to a Group of Units**

22.1. To **Add** a **Tag** to a group of Units, open the **Unit Inventory**
22.2. **Locate** the **Cards** of the **Units** you want to **Tag**
22.3. To the **Left** of the **Unit Number** there is a **Square, Click** on it to **Select** the card
22.4. The **Bulk Actions Button** will **Display** to the **Right** of the **Colored Rectangles**
22.5. **Click** the **Bulk Actions Button** and select **Apply Bulk Tags**
22.6. **From** the **Dropdown Menu** in the **Bulk Apply pop-up,** select the **Tag(s)** you want to **Add**
22.7. To **Close** the dropdown**, Click** out of the dropdown **but Inside the pop-up**
22.8. Then **Click Update**

!! ***Heads–Up***

- ***Tags*** *can only be added in bulk to* ***Available Units*** *and are reflected* ***Across*** *the* ***Platform****.*
- *If the* ***Tag*** *that you need is not in the* ***Dropdown Menu****, you must* ***Add*** *it to the* ***Tag List****.* *Follow these steps*

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23. **!!** ***STOP. Before you Update the Status of a Unit, Read This:***

- *When using the **Transaction Management App** to complete transactions, refrain from changing a unit's status to **Sold** or **Conditional** in the **Inventory and Price Manager**. This action **Removes** it from the Transaction Manager app, **Hindering Transaction Completion.***

- *As long as you are **Not Using** the **Transaction Management App** as part of your process, you can **Use All Status Options** to manage your inventory.*

- *Units that are **SOLD**, **CONDITIONAL**, or on **HOLD** are **Locked** and their status **Can't be Updated**.*

- ***Unit Updates** are reflected **Across** the **Platform**, so, for example, if you update a Unit from **Available** to **Not Released**, the Unit will be **Automatically HIDDEN** from the **Condo Units List** on the **Website** and **Touchscreen**.*

  To update the status of a Unit follow these steps.

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24. **Update the Status of a Unit**

24.1. To **Update** the **Status** of a **Unit** from the **Unit Card,** find the **Three-dot Action Menu** located next to the **Status**
24.2. **Click** on it
24.3. From the **Dropdown,** select **Update Status**
24.4. In the **Status Pop-up,** click on the **Status Field** to display the **Status Dropdown**
24.5. **Select** a **New Status**
24.6. **Click Update**

***Info:** **Once a Unit's Status is Updated to Sold or Conditional**,*
*You can select the **Unit Add-Ons** and enter the **Final Price**, **Sales Owner*** and **Purchasers***.*

*If the unit has been updated to **Conditional**, you can enter a **Final Price***.*

* Mandatory fields.

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About Unit Add-Ons: Add Parking Spots, Lockers and Bike Racks

> ***Info:* About Add-Ons**
> *There is often a **Specific Number** of add-ons **Assigned** to **Condo Units** (even if they are not predefined). A buyer is **Not Required** to **Purchase** all or any of the **Add-ons** allocated to their unit. It is possible for **Other Buyers** to **Purchase** the left-over **Add-ons** at a later time, at the point of sale, or even after the sale.*
>
> *In some cases, **Add-ons** are **Predefined**, and a specific parking spot, locker, or bike rack is **Associated** with a **Specific Unit**. Using the Condo Unit Configurator, you can enter this information when Configuring the Condo Units.*
>
> *You can also use the **Inventory Price Management App**, to assign an **Add-on** to a Unit.*

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25. Assign Parking Spots, Lockers, and or Bike Racks to a Unit

!! STOP. Do this, only if the Transaction Management app is NOT BEING USED to finalize the Purchase/Lease Agreement.

*If you are **Using** the Transaction Management App, **Enter Add-ons** when **Finalizing** an **Agreement.***

25.1. **Locate** the **Unit Card** to which you want to assign an Add-On
25.2. Find the **Status** button
25.3. To the right of the button, find the **Three-dot Action Menu** and **Click** on it
25.4. From the Dropdown, **Select Update Status**
25.5. On the **Update Status pop-up**, find the **Status Field** and click on it
25.6. From the **Status Dropdown**, select **SOLD**
25.7. The Unit's update **Pop-up** will open
25.8. **Below** the **Status Field**, select the **Parking**, **Locker** or **Bike Rack** tab
25.9. **Click** on the **Parking**, **Locker** or **Bike Rack Field** to display a **Dropdown** of the available Parking Spots, Lockers or Bike Racks
25.10. **Select** the **Add-on** you want to **Assign** to the **Unit**
25.11. Enter a **Sales Owner** *
25.12. Enter a **Purchaser** *
25.13. Click **Update**

* Mandatory Fields

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26. **Unlock a Unit**

!! ***Why is it Locked?***
*Units that are **SOLD**, or on **HOLD** are **Locked** and their status **Can’t be Updated**.*

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27. **Initiate or Make a Transaction**

Info: *Transactions **Cannot** be made **Directly** from the **Inventory and Price Management App**, but by clicking on **Make a Transaction**, you will be **Connected** to the **Transaction Management App**.*

27.1. To **Make** a **Transaction** from a **Unit Card**, find the **Three-dot Action Menu** located next to the **Status** of the **Unit**
27.2. **Click** on it
27.3. From the **Dropdown,** select **Make a Transaction**
27.4. The **Transaction Management App** will open
27.5. You can also **Initiate** a **Transaction** from the Unit Information Pop-up

Info: *Click here to learn how to finalize agreements using the **Transaction Management App.***

‼ ***Heads-Up***
__These Updates__ are reflected __Across__ the __Platform__.

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28. **Display the Unit's Information**

28.1. To **view the Unit's Information,** locate the **Card** of the **Unit** you are interested in
28.2. **Click** on the **Card**
28.3. The Units Pop-up displays the Floorplan, Floorplates, and all the information about the Unit entered in the Condo Unit Configurator, including the **Parking Spots**, **Lockers**, and **Bike Racks** associated with it. Additionally, it displays the **Total**.
28.4. You can also **Initiate** a **Transaction** from the **Home Model Pop-up**

Info: *Click here to learn how to finalize agreements using the **Transaction Management App.***

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Unit Add-Ons Management

29. **Intro to the Unit Add-Ons Management Screen**

Intro: To get to the **Unit Add-Ons Management Screen**, go to the **Left Navigation Bar** and select **Unit Add-Ons Management**. The Parking Spots Tab opens by default, but you can navigate to the **Locker Tab** or **Bike Rack Tab** by clicking them at the **Top Left** of the screen. There are three sections in these screens:

- **Overview**
- **Filters**
- **Units**

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Add-Ons Management – Parking Spots

30. Parking Spots Inventory Overview

Info: *This section is located at the **Top** of the screen and provides an **Overview** of the **Parking Spots** available in the High-Rise community. It is arranged by **Status** and is **Updated** in **Real Time**. At a glance, you see the following:*

- *Total Parking Spots*
- *Parking Spots Available*
- *Parking Spots Sold*
- *Sold Conditional*
- *Parking Spots on Hold*

This information is populated with the information you entered in the Condo Unit configurator.

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31. **Filter the Parking Spots by Status**

Info: About Parking Cards

*The **Parking Cards** are the main section of the Parking Spots Management screen. These display the different **Parking Spots** and their **Details**. All parking spots are displayed and sorted numerically by **Default**. Use **Filters** to display only **Certain Spots**.*

31.1. Above the **Parking Cards,** locate the **Colored Rectangles**
31.2. Checkmark **One or More** of the **Status Rectangles**
31.3. Only the **Spots** that **Align** with your **Criteria** will be **Displayed**

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32. **List of Parking Spots - Card View**

***Info:* About the Parking Spots List**

*This **List** displays the different **Parking Spots** and their details sorted numerically. By default, **Spots** are displayed in the **Card View**. In each card, you'll find **Information Inherited** from the information you added when **Configuring** the **Unit** using the Condo Unit Configurator:*

- *Parking Spot Number*
- *Parking Spot Tags*
- *Unit Code*
- *Parking Spot ID*
- *Parking Spot Number*
- *Parking Type*
- *Condo Unit Number*
- *Parking Spot Price*
- *Parking Description*

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Edits Done from the Parking Spots Cards

Info:* *Make Adjustments from the Parking spots Cards
*You can make some **Edits** from a **Parking Spot Card**, like **Adding** or **Removing Tags**, **Changing** the **Status** (only for **Available** Units) and Initiating a **Transaction**.*

33. **Remove a Tag from a Parking Spot**

   33.1. To **Remove** a **Tag** from a **Parking Spot**, **Find** the **Card**
   33.2. At the **Top** of the **Card,** find the **Tag(s) Field**
   33.3. Locate the **Tag** that you want to **Delete** and **Click** the **X** next to the name
   33.4. The **Tags** are **Updated**

!! ***Heads–Up***
__These Updates__ are reflected __Across__ the __Platform__. Parking Spots that are __SOLD__, __SOLD CONDITIONAL__ or on __HOLD__ are __Locked__ and their information __Can't be Updated__.

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34. **Add a Tag to a Parking Spot**

34.1. To **Add** a **Tag** to a **Parking Spot**, **Find** the **Parking Spot Card**
34.2. At the **Top** of the **Card,** find the **Tag(s) Field**
34.3. **Click** the **Tag Field** to **Display** the **Tags Dropdown Menu**
34.4. Locate the **Tag** that you want to **Add** and **Select it**
34.5. The **Tags** will be **Updated**

!! ***Heads–Up***

- *These **Updates** are reflected **Across** the **Platform***
- *If the **Tag** that you need is not in the **Dropdown Menu**, you will need to **Add** the tag to the **Tag List**. Follow these steps.*
- ***Sold, Sold Conditional,** and **Hold** Parking Spots can't have any tags added to them.*

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35. **Bulk Actions: Add a Tag to a Group of Parking Spots**

!! ***Heads–Up***
Bulk Tags *can only be added to* ***Available Spots*** *and are reflected* ***Across*** *the* ***Platform****.*

35.1. To **Add** a **Tag** to a group of Parking spots, go to the **Parking Spots List**
35.2. **Locate** the **Cards** of the **Parking Spots** you want to **Tag**
35.3. To the **Left** of the **Parking Number** there is a **Square, Click** on it to **Select** the card
35.4. The **Bulk Actions Button** will **Display** to the **Right** of the **Colored Rectangles**
35.5. **Click** the **Bulk Actions Button** and select **Apply Bulk Tags**
35.6. **From** the **Dropdown Menu** in the **Bulk Apply pop-up,** select the **Tag(s)** you want to **Add**
35.7. To **Close** the dropdown**, Click** out of the dropdown **but Inside the pop-up**
35.8. Then **Click Update**

!! I can't see the Tag I am Looking for.
If your tag is not there, you need to *Add it in the settings*

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36. **Update the Status of a Parking Spot**

36.1. To **Update** the **Status** of a **Parking Spot** from the **Card,** find the **Three-dot Action Menu** located to the **Right** of the **Status** of the Parking Spot
36.2. **Click** on it
36.3. From the **Dropdown,** select **Update Status**
36.4. In the **Status Pop-up,** click on the **Status Field** to display the **Status Dropdown**
36.5. **Select** a **New Status**
36.6. **Click Update**

Info: *When changing the **Status** of a **Parking Spot**, you **Must Select** a **Unit** to link to this **Parking Spot**, from the dropdown menu. You can also enter the **Final Price** if the **Status** is changing to **Sold** or **Conditional** (not mandatory).*

!! ***Remember there Are Only a Limited Number of Parking Spots that you can Assign to a Unit***
*If the Unit has reached the **Limit** of **Allotted Parking Spots**, you will be notified and you will **NOT** be able to **Add Another** one unless you **Raise** the number of allotted **Parking Spots** for the unit using the Condo Unit Configurator.*

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Add-Ons Management – Lockers

37. Lockers Inventory Overview

Intro: *This section is located at the* ***Top*** *of the screen and provides an* ***Overview*** *of the* ***Lockers*** *available in the High-Rise community. It is arranged by* ***Status*** *and is* ***Updated*** *in* ***Real Time****. At a glance, you see the following:*

- *Total Lockers*
- *Lockers Available*
- *Lockers Sold*
- *Sold Conditional*
- *Lockers on Hold*

This information is populated with the information you entered in the [Condo Unit Configurator](#).

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38. **Filter the Locker Cards by Status**

Info: ***About the Locker Cards,***
*the **Locker Cards are t**he main elements of the Locker Management screen. These display the different Lockers and their details. **All Lockers** are displayed and sorted numerically by **Default**. Use **Filters** to display only **Certain Lockers**.*

38.1. Above of the **Locker Cards,** locate the **Colored Rectangles**
38.2. Checkmark **One or More** of the **Status Rectangles**
38.3. Only the **Lockers** that **Align** with your **Criteria** will be **Displayed**

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39. **List of Lockers - Card view**

Info: *The **Locker List** displays the different **Lockers** and their details sorted numerically. By default, **Lockers** are displayed in the **Card View**. Each card contains the following information which that **Inherited** from the information you entered when you **Configured** the **Unit** using the* [*Condo Unit Configurator:*]

- *Locker Number*
- *Locker Tags*
- *Locker Code*
- *Locker ID*
- *Locker Number*
- *Locker Type*
- *Condo Unit Number*
- *Locker Price*
- *Locker Description*

Info: *Some **Edits** can be done from a **Locker Card**, like **Adding** or **Removing Tags**, **Changing** the **Status** (only for **Available** Lockers) and Initiating a **Transaction**.*

‼ ***Why is it Locked?***

*Lockers that are **SOLD**, **SOLD CONDITIONAL** or on **HOLD** are **Locked** and their information **Can't be Updated**.*

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Edits Done from the Lockers Cards

> ***Info:*** *Some **Edits** are done from a **Locker Card**, like **Adding** or **Removing Tags**, **Changing** the **Status** (only for **Available Lockers**) and Initiating a **Transaction**.*

40. **Remove a Tag from a Locker**

    40.1. To **Remove** a **Tag** from a **Locker**, **Find** the **Card**
    40.2. At the **Top** of the **Card,** find the **Tag(s) Field**
    40.3. Locate the **Tag** that you want to **Delete** and **Click** the **X** next to the name
    40.4. The **Tags** will be **Updated**

> **!!** ***Heads–Up***
> ***These Updates** are reflected **Across** the **Platform**. Lockers that are **SOLD**, **SOLD CONDITIONAL** or on **HOLD** are **Locked** and their information **Can't be Updated**.*

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41. Add a Tag to a Locker

41.1. To **Add** a **Tag** to a **Locker**, **Find** the **Locker Card**
41.2. At the **Top** of the **Card,** find the **Tag(s) Field**
41.3. **Click** the **Tag Field** to **Display** the **Tags Dropdown Menu**
41.4. Locate the **Tag** that you want to **Add** and **Select it**
41.5. The **Tags** will be **Updated**

!! ***Heads–Up***

- *These **Updates** are reflected **Across** the **Platform**.*
- ***Sold, Sold Conditional,** and **Hold** Lockers can't have any tags added to them.*
- *If the **Tag** that you need is not in the **Dropdown Menu**, you will need to **Add** the tag to the **Tag List**. Follow these steps.*

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42. **Bulk Actions: Add a Tag to a Group of Lockers**

!! ***Heads–Up***

Bulk Tags *can only be added to* ***Available Lockers*** *and are reflected* ***Across*** *the* ***Platform****.*

42.1. To **Add** a **Tag** to a group of **Lockers**, go to the **Lockers List**
42.2. **Locate** the **Cards** of the **Lockers** you want to **Tag**
42.3. To the **Left** of the **Locker Number** there is a **Square, Click** on it to **Select** the card
42.4. The **Bulk Actions Button** will **Display** to the **Right** of the **Colored Rectangles**
42.5. **Click** the **Bulk Actions Button** and select **Apply Bulk Tags**
42.6. **From** the **Dropdown Menu** in the **Bulk Apply pop-up,** select the **Tag(s)** you want to **Add**
42.7. To **Close** the dropdown**, Click** out of the dropdown **but Inside the pop-up**
42.8. Then **Click Update**

!! I can't see my Tag

If your tag is not there, you need to Add it in the settings

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43. Update the Status of a Locker

43.1. To **Update** the **Status** of a **Locker** from the **Card,** find the **Three-dot Action Menu** located to the **Right** of the **Status**
43.2. From the **Dropdown,** select **Update Status**
43.3. In the **Status Pop-up,** click on the **Status Field** to display the **Status Dropdown**
43.4. **Select** a **New Status**
43.5. **Click Update**

Info: *When changing the **Status** of a **Locker**, you must select a **Unit** from the **Dropdown** menu. If the **Status** is changing to **Sold** or **Conditional,** you can also enter the **Final Price** (not mandatory).*

!! ***Remember there Are Only a Limited Number of Lockers that you can Assign to a Unit***
*If the Unit has reached the **Limit** of **Allotted Lockers**, you will be notified and you will **NOT** be able to **Add Another** one unless you **Raise** the number of allotted **Lockers** for the unit using the Condo Unit Configurator.*

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Add-Ons Management – Bike Racks

44. Bike Rack Inventory Overview

***Info:* About Bike Racks**
*This section is located at the **Top** of the screen and provides an **Overview** of the **Bike Racks** available in the High-Rise community. It is arranged by **Status** and is **Updated** in **Real Time**. At a glance, you see the following:*

- *Total Bike Racks*
- *Bike Racks Available*
- *Bike Racks Sold*
- *Sold Conditional*
- *Bike Racks on Hold*

This information is populated with the information you entered in the Condo Unit Configurator.

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45. **Filter the Bike Racks by Status**

***Info:* About Bike Rack Cards**
*The main section of the Bike Racks Management screen are the **Bike Racks Cards**. These display the different Bike Racks and their details. All Bike Racks are displayed and sorted numerically by **Default**. Use **Filters** to display only **Certain Bike Racks**.*

45.1. Above of the **Locker Cards,** locate the **Colored Rectangles**
45.2. Checkmark **One or More** of the **Status Rectangles**
45.3. Only the **Bike Racks** that **Align** with your **Criteria** will be **Displayed**

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46. **List of Bike Racks - Card View**

Info: ***About The Bike Rack List***
*The **Bike Racks List** displays the different **Bike Racks** and their details sorted numerically. By default, **Bike Racks** are displayed in the **Card View**. In each card, you'll find **Information Inherited** from the information you added when **Configuring** the **Unit** using the [Condo Unit Configurator:](#)*

- *Bike Rack Number*
- *Bike Rack Tags*
- *Bike Rack Code*
- *Bike Rack ID*
- *Bike Rack Number*
- *Bike Rack Type*
- *Condo Unit Number*
- *Bike Rack Price*
- *Bike Rack Description*

Info: ***Make Adjustments from the Bike Rack Card***
*Some **Edits** that can be done from a **Bike Rack Card**, like **Adding** or **Removing Tags**, **Changing** the **Status** (only for **Available** Bike Racks) and Initiating a **Transaction**.*

!! ***Why is it Locked?***
*Bike Racks that are **SOLD**, **SOLD CONDITIONAL** or on **HOLD** are **Locked** and their information **Can't be Updated**.*

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Edits Done from the Bike Racks Cards

Info: *Some **Edits** can be done from a **Locker Card**, like **Adding** or **Removing Tags**, **Changing** the **Status** (only for **Available Lockers**), and Initiating a **Transaction**.*

47. **Remove a Tag from a Bike Rack**

47.1. To **Remove** a **Tag** from a **Bike Rack**, **Find** the **Card**
47.2. At the **Top** of the **Card,** find the **Tag(s) Field**
47.3. Locate the **Tag** you want to **Delete** and **Click** the **X** next to the name
47.4. The **Tags** are **Updated**

!! ***Heads–Up***
***These Updates** are reflected **Across** the **Platform**. Bike Racks that are **SOLD**, **SOLD CONDITIONAL** or on **HOLD** are **Locked** and their information **Can't be Updated**.*

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48. **Add a Tag to a Bike Rack**

48.1. To **Add** a **Tag** to a **Bike Rack**, **Find** the **Bike Rack Card**
48.2. At the **Top** of the **Card,** find the **Tag(s) Field**
48.3. **Click** the **Tag Field** to **Display** the **Tags Dropdown Menu**
48.4. Locate the **Tag** that you want to **Add** and **Select it**
48.5. The **Tags** are **Updated**

!! ***Heads–Up***

- *These **Updates** are reflected **Across** the **Platform**.*
- ***Sold, Sold Conditional,** and **Hold** Bike Racks can't have any tags added to them.*
- *If the **Tag** that you need is not in the **Dropdown Menu**, you will need to **Add** the tag to the **Tag List**.* [*Follow these steps.*]

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49. Bulk Actions: Add a Tag to a Group of Bike Racks

!! ***Heads–Up***

Bulk Tags *can only be added to* ***Available Bike Racks*** *and are reflected* ***Across*** *the* ***Platform****.*

49.1. To **Add** a **Tag** to a group of **Bike Racks**, go to the **Bike Rack List**
49.2. **Locate** the **Cards** of the **Bike Racks** you want to **Tag**
49.3. To the **Left** of the **Bike Rack Number** there is a **Square, Click it** to **Select** the card
49.4. The **Bulk Actions Button** will **Display** to the **Right** of the **Colored Rectangles**
49.5. **Click** the **Bulk Actions Button** and select **Apply Bulk Tags**
49.6. **From** the **Dropdown Menu** in the **Bulk Apply pop-up,** select the **Tag(s)** you want to **Add**
49.7. To **Close** the dropdown**, Click** out of the dropdown **but Inside the pop-up**
49.8. Then **Click Update**

!! Why can't I see my Tag?

If your tag is not there, you need to [Add it in the settings]

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50. Update the Status of a Bike Rack

50.1. To **Update** the **Status** of a **Bike Rack** from the **Card,** find the **Three-dot Action Menu** located to the **Right** of the **Status** of the Bike Rack
50.2. **Click** on it
50.3. From the **Dropdown,** select **Update Status**
50.4. In the **Status Pop-up,** click on the **Status Field** to display the **Status Dropdown**
50.5. **Select** a **New Status**
50.6. **Click Update**

Info: *When changing the **Status** of a **Bike Rack**, you **Must Select** a **Unit** to link to it from the dropdown menu. You can also enter the **Final Price** if the **Status** is changing to **Sold** or **Conditional** (not mandatory).*

!! ***Remember there Are Only a Limited Number of Bike Racks that you can Assign to a Unit***
If the Unit reaches the allotted Bike Racks, you get notified and will not be able to add another one unless you raise the number of allotted Racks for the unit using the Condo Unit Configurator.

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Price Management – Units

51. **Units Price List**

***Info:* About the Units Price List**
*In the Units Tab of the **Price Management Screen**, you can **Manage** the **Price** of a **Unit**. In the Units Price List, you can see only the **Available Units**, which include the following information:*

- *Unit Number*
- *Marketing Name*
- *Interior Sq. Ft.*
- *Exterior Sq. Ft.*
- *Unit Premiums*
- *Unit Add-Ons* *
- *Unit Premium Price*
- *Unit Add-On Price*

* *A **Square** with a **Number** indicates that **More Than One Add-On Applies** to the Unit. **Click** on the number to **View Them** all.*

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52. **Unit not in the Unit Price List**

‼ ***I Can't See a Unit in the Unit Price List***

*A Unit **MUST BE PUBLISHED** to appear in the **Unit Price List.** To **Publish** a **Unit,** you must use the Condo Unit Configurator.*

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53. Adjust a Unit Price

!! ***Heads–Up***

These Updates *are reflected* ***Across*** *the* ***Platform****.*

53.1. To **Adjust** the **Price of a Unit,** find the **Unit** in the **List** and **Click** on the **Square** to the left of the **Unit #** to select it

53.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it

53.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Decrease the Price or Percentage

53.4. Then, select the **Price Icon** or **Percentage Icon** to indicate whether to **Adjust** by **Price or Percentage**

53.5. In the field, enter the **Number of Dollars** or **Percentage Value**

53.6. Click **Update**

53.7. The **Total Price** will be **Updated** to reflect the **Changes**

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54. Bulk Adjust Unit Prices

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****.*

54.1. To **Adjust** the **Price** of **Multiple Units,** select **All** those that need **Adjusting**
54.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
54.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select the **Price Icon** or **Percentage Icon**
54.4. In the field, enter the new **Price** or **Percentage**
54.5. Click **Update**
54.6. The **Total Price** of the selected **Units** will be **Updated** to reflect the **Changes**

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Price Management – Premiums

55. Unit Premiums Price List

Info: *In the Premiums Tab of the **Price Management Screen**, you can **Manage** the **Price** of Unit **Premiums**. You can see the following information:*

- ***Name** of the **Unit Premium***
- ***Available Units** where that **Premium Applies***

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56. Unit Premium Not in the Premiums Price List

56.1. If the name of a **Unit Premium** does not **Appear** in your list, you need to **Add It** using the Condo Unit Configurator.

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57. Adjust the Price of a Unit Premium

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****.*

57.1. To **Adjust** the **Price of a Unit Premium,** find it in the **List** and **Click** on the **Square** to the left of the **Name of the Unit Premium** to select it
57.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
57.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
57.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
57.5. **Click Update**
57.6. The **Price** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
The ***Total Price*** *of the* ***Unit*** *containing this* ***Premium*** *will also be* ***Updated*** *to reflect the* ***Changes.***

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58. **Bulk Adjust Unit Premium Prices**

58.1. To **Adjust** the **Price** of **Multiple Unit Premiums,** select **All** those that need **Adjusting**
58.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
58.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
58.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
58.5. **Click Update**
58.6. The **Price** of the selected **Premiums** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****. The* ***Total Price*** *of the* ***Units*** *containing these* ***Premiums*** *will also be* ***Updated*** *to reflect the* ***Changes.***

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Price Management Add-Ons – Parking Spots

59. **Parking Spots Price List**

***Info:* About the Parking Spots Price List**
*In the Add-Ons Tab of the **Price Management Screen**, you can **Manage** the **Price** of **Parking Spots**. Check below the Units, Premiums and Add-Ons tab to **Make Sure** the **Parking Spot Button** is selected. You can see the following information:*

- ***Parking ID***
- ***Parking Spot #***
- ***Parking Spot Type***
- ***Parking Spot Description***
- ***Unit #***
- ***Parking Spot Price***

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60. Parking Spot Not in the Parking Spots Price List

60.1. If the **Parking Spot** does **Not Appear** on your list, you need to **Add It** using the Condo Unit Configurator.

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61. Adjust the Price of a Parking Spot

61.1. To **Adjust** a **Parking Spot's Price,** find it in the **List** and **Click** on the **Square** to the left of it
61.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
61.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
61.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
61.5. **Click Update**
61.6. The **Price** will be **Updated** to reflect the **Changes**

‼ ***Heads–Up***
__These Updates__ are reflected __Across__ the __Platform__. The __Total Price__ of the __Unit__ linked to this Parking Spot will also be __Updated__ to reflect the __Changes.__

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62. **Bulk Adjust Unit Parking Spots**

62.1. To **Adjust** the **Price** of **Multiple Parking Spots,** select **All** those that need **Adjusting**
62.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
62.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
62.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
62.5. **Click Update**
62.6. The **Price** of the selected **Parking Spots** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****. The* ***Total Price*** *of the* ***Units*** *linked to these Parking Spots will also be* ***Updated*** *to reflect the* ***Changes.***

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Price Management Add-Ons – Lockers

63. Lockers Price List

***Info:* About the Lockers Price List**

*In the Add-Ons Tab of the **Price Management Screen**, you can **Manage** the **Price** of **Lockers**. Check below the Units, Premiums, and Add-Ons tab to **Make Sure** that the **Lockers Button** is **Selected**. You can see the following information:*

- ***Locker ID***
- ***Locker #***
- ***Locker Description***
- ***Unit #***
- ***Locker Price***

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64. **Locker Not in the Locker Price List**

64.1. If the **Locker** does **Not Appear** in your list, you need to **Add It** using the Condo Unit Configurator.

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65. Adjust the Price of a Locker

65.1. To adjust a **Loker's Price**, find it in the list and **Click** the **Square** to the left of it
65.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
65.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
65.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
65.5. **Click Update**
65.6. The **Price** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****. The* ***Total Price*** *of the* ***Unit*** *linked to this Locker will also be* ***Updated*** *to reflect the* ***Changes.***

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66. **Bulk Adjust Unit Lockers**

66.1. To **Adjust** the **Price** of **Multiple Lockers,** select **All** those that need **Adjusting**
66.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
66.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
66.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
66.5. **Click Update**
66.6. The **Price** of the selected **Lockers** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****. The* ***Total Price*** *of the* ***Units*** *linked to these Parking Spots will also be* ***Updated*** *to reflect the* ***Changes.***

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Price Management Add-Ons – Bike Racks

67. Bike Racks Price List

***Info:* About the Bike Racks Price List**
*In the Add-Ons Tab of the **Price Management Screen**, you can **Manage** the **Price** of **Bike Racks**. Check below the Units, Premiums and Add-Ons tab to **Make Sure** that the **Bike Racks Button** is **Selected**. You can see the following information:*

- ***Bike Rack ID***
- ***Bike Rack #***
- ***Bike Rack Description***
- ***Unit #***
- ***Bike Rack Price***

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68. Bike Rack Not in the Price List

68.1. If the **Bike Rack** does **Not Appear** in your list, you need to **Add It** using the Condo Unit Configurator.

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69. Adjust the Price of a Bike Rack

69.1. To adjust a **Bike Rack's Price**, find it in the list and **Click** the **Square** to the left of it
69.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
69.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
69.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
69.5. **Click Update**
69.6. The **Price** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates** are reflected **Across** the **Platform**. The **Total Price** of the **Unit** linked to this Bike Rack will also be **Updated** to reflect the **Changes.

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70. **Bulk Adjust Bike Racks**

70.1. To **Adjust** the **Price** of **Multiple Bike Racks,** select **All** those that need **Adjusting**
70.2. At the **Top Right** of the **Screen**, the **Adjust Price** button displays, **Click** on it
70.3. In the **Adjust The Price** pop-up, Select **–** or **+** to Increase or Reduce the Price/ Percentage then select **Price** or **Percentage**
70.4. In the **Price/ Percentage** field, enter the new **Price** or **Percentage**
70.5. **Click Update**
70.6. The **Price** of the selected **Bike Racks** will be **Updated** to reflect the **Changes**

!! ***Heads–Up***
These Updates *are reflected* ***Across*** *the* ***Platform****. The* ***Total Price*** *of the* ***Units*** *linked to these Bike Racks will also be* ***Updated*** *to reflect the* ***Changes.***

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Price History – Units

71. Units Price History

Info: *In the Units Tab of the **Price History Screen**, you can **View all the price changes done to the Prices of Units.** The following information is displayed:*

- *Date*
- *Item (Unit Number)*
- *Sales Rep*
- *Previous Price*
- *Adjustment (in price and percentage)*
- *New Price*

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Price History – Premiums

72. **Premiums Price History**

Info: *In the Premiums Tab of the* ***Price History Screen****, you can* ***View all the price changes done to the Prices of Premiums.*** *The following information is displayed:*

- *Date*
- *Item (Premium Name)*
- *Sales Rep*
- *Previous Price*
- *Adjustment (in price and percentage)*
- *New Price*

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Price History – Parking Spots, Lockers and Bike Racks

73. **Parking Spots, Lockers, and Bike Racks Price History**

Info: *In the Premiums Tab of the **Price History Screen**, you can **View all the Price Changes** that have been made to the **Prices of Parking Spots, Lockers, and Bike Racks.** Make sure to select the Parking Spots Button, the Lockers Button, or the Bike Racks Button, at the top of the screen. The following information is displayed:*

- *Date*
- *Item (Name of Add-On)*
- *Sales Rep*
- *Previous Price*
- *Adjustment (in price and percentage)*
- *New Price*

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Allocations Reservations and Commissions for VIP Brokers

74. Before you Start

74.1. **First,** Integrate with Stripe

74.2. Then, **Define** the following **Settings**

- Reservation Fee and Refund Policy
- Who gets notified when a reservation comes in
- Reservation Release Policy
- Email Sender
- Agent Commission Structure
- Agent Payout Structure

Commission and Allocation Management – Units

75. Assign/Unassign a Unit

75.1. On the **Left Navigation Bar**, click **Commission & Allocation Management**
75.2. Confirm the **Units** tab is selected
75.3. Locate the **Unit** you want to **Assign**
75.4. At the end of the unit's **Row**, click **Assign**
75.5. In the **Assign Unit** pop-up select the **VIP Realtor** * you want to assign the unit to
75.6. Set the **Expiration Date***
75.7. Click **Save**
75.8. To **Unassign,** locate the **Unit** you want to unassign**,** and at the end of the row, click **Unassign**
75.9. On the pop-up, click **Proceed**

* Mandatory fields

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76. **Adjust the Commission Structure for this Unit**

76.1. If you want to adjust the **Commission Structure** for this Unit,
76.2. Go to the **Left Navigation Bar**, and click **Commission & Allocation Management**
76.3. Confirm the **Units** tab is selected at the top
76.4. Locate the **Unit** for which you want to adjust the **Commission**
76.5. At the end of the row, click **Commission**
76.6. In the Commission Structure pop-up, **Update** the **Options** as required
76.7. To **Reset** to original options, click **Reset to General Commission Structure**

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77. **Bulk Actions - Assign, Unassign, and Commission More Than One Unit**

77.1. On the **Left Navigation Bar**, click **Commission & Allocation Management**
77.2. Confirm the **Units** tab is selected
77.3. **Narrow Down** your **List** of **Units**, filtering them either by Status or Other Filters
77.4. Click the **Checkboxes** next to each unit to **Select** them
77.5. At the **Top** of the list of units, find the **Bulk Actions** dropdown menu
77.6. **Click** and select the **Action** you want to perform: **Assign, Unassign,** or **Commission**
77.7. If you select **Assign**, you will be prompted to select the **VIP Realto**r you want to assign the units to and enter an **Expiration Date**
77.8. Once you have entered the information, click **Assign** to apply the bulk action to the selected units
77.9. If you select **Unassign**, you will be asked to **Confirm** that you want to **Unassign** the selected units from their current **VIP Realtor**
77.10. If you select **Commission**, you will be asked to enter the **Commission Percentage** or **Amount** for the selected units
77.11. Once you have made your selection, click **Update** to apply the bulk action

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Commission and Allocation Management – Parking Spots, Lockers, or Bike Racks

78. Assign/Unassign Add-Ons – Parking Spots, Lockers, or Bike Racks

78.1. On the **Left Navigation Bar**, click **Commission & Allocation Management**
78.2. Select either the **Parking Spots, Lockers, or Bike Racks** tabs
78.3. Locate the **Spot, Locker, or Bike Rack** you want to **Assign**
78.4. At the end of the item's **Row**, click **Assign**
78.5. In the **Assign Add-On To** pop-up select the **VIP Realtor** * you want to assign the Parking Spot, Locker, or Bike Racks to
78.6. Set the **Expiration Date***
78.7. Click **Save**
78.8. To **Unassign,** locate the **Add-On** you want to unassign**,** and at the end of the row, click **Unassign**
78.9. On the pop-up, click **Proceed**

* Mandatory fields

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79. **Adjust the Commission Structure for the Add On's**

79.1. If you want to adjust the **Commission Structure** for this **Add-On**,
79.2. Go to the **Left Navigation Bar**, and click **Commission & Allocation Management**
79.3. Select the **Parking Spot**, **Locker**, or **Bike Rack** tab
79.4. Locate the **Add-On** for which you want to adjust the **Commission**
79.5. At the end of the row, click **Commission**
79.6. In the Commission Structure pop-up, **Update** the **Options** as required
79.7. To **Reset** to original options, click **Reset to General Commission Structure**

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80. Bulk Actions - Assign and Unassign More Than One Add-On

80.1. On the **Left Navigation Bar**, click **Commission & Allocation Management**
80.2. Select the **Parking Spot**, **Locker**, or **Bike Rack** tab
80.3. **Filter your List** by **Realtors/Assignees, Type, or Price**
80.4. Click the **Checkboxes** next to each **Parking Spot**, **Locker**, or **Bike Rack** to **Select** them
80.5. At the **Top** of the list, find the **Bulk Actions** dropdown menu
80.6. **Click** and select **Bulk Assign** or **Bulk Unassign**
80.7. If you select **Assign**, you will be prompted to select the **VIP Realto**r you want to assign the Add-Ons and enter an **Expiration Date**
80.8. Once you have entered the information, click **Assign** to apply the bulk action to the selected items
80.9. If you select **Unassign**, you will be asked to **Confirm** that you want to **Unassign** the selected items from their current **VIP Realtor**
80.10. Once you have made your selection, click **Update** to apply the **Bulk Action**

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Commission and Allocation History

81. **Commission and Allocation History for Units, Parking Spots, Lockers, and Bike Racks**

    81.1. On the **Left Navigation Bar**, click **Commission & Allocation History**
    81.2. The **Commission History** is displayed by **Default**
    81.3. If you want to view the **Allocation History**, go to the top and select the **Allocation** button
    81.4. The Unit History displays by Default
    81.5. To view the **Parking Spot**, **Locker**, or **Bike Rack** history, select one of those tabs
    81.6. The **Units**, **Parking Spots**, Lockers, or **Bike Racks** are listed by item #
    81.7. Each item includes **Status**, **Date**, **Realtor** information, and **Expiry Date** information

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Date	*Reviewer*	*Status*	*Activities*
Jan 30/2023	Gildie	Done	☑ ~~Add Header and Footer.~~ ☑ ~~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~~
Feb 6/2023	GIldie/ Nancy	Done	☑ ~~Reviewed with Nancy~~ ☑ ~~Check High-Rise vs Highrise~~ ☑ ~~Check grammar~~
	Gildie	Done	☑ ~~to Document as per Edits~~ ☑ ~~Make List of Notes for Justin~~ ☑ ~~Update Last Edited~~
Jan 30/2023	Gildie	Done	☑ ~~Change the Info titles to gray~~ ☑ ~~Update Last Edited~~
Feb 3/2023	Gildie	Done	Check grammar
Apr 28/2023	Jay	Done	☑ ~~Entered into Freshdesk~~
Feb 8, 2024	Gildie	Done	☑ ~~Add Allocation, Reservation, and Commission for VIP Brokers~~ ☑ ~~Adjust Inventory Screen; add Commission and Allocation Management selection~~ ☑ ~~Commission and Allocation History selection~~ ☑ ~~Add Allocation, Reservation, and Commissions for FIP Brokers~~

Last Edited May 2/2024

Date	Reviewer	Status	Activities
			~~Section~~ ☑ ~~Add Settings for Reservation and Commission~~ ☑ ~~Commission and Allocation Management – Units~~ ☑ ~~Commission and Allocation Management - Parking Spots, Lockers or Bike Racks~~ ☑ ~~Add Commission and Allocation History~~ ☑ ~~Add Only on Premium you can see commission and Allocation~~ ☑ ~~Adjust Heads-Up in the Agent Commission Structure.~~ ☑ ~~Check naming for Payout Entry~~ ☑ ~~Check Form and Survey~~ ☑ ~~Write heads up about the end of the date period… The units get released.~~ ☑ ~~Be careful with assigning the worksheet to a VIP Realtor because only they can see it.~~ ☑ ~~Heads up for premium subscription~~
Feb 13, 2024	Gildie	Done	☑ ~~Adjusted the Title, and Heads-up for this section: Filter the Units by Realtors/Asignees Type, Price, Sq. Ft., Beds, Baths, Floor, Exposure, Exteriors, Tags~~
	Nancy	Not started	☑ ~~Have Jay adjust in FD:~~ ☑ ~~Adjust the Title, and Heads-up for this section: Filter the Units by Realtors/Asignees Type, Price, Sq. Ft., Beds, Baths, Floor, Exposure, Exteriors, Tags~~ ☑ ~~Add the Allocation, Reservation, and Commissions for VIP Brokers section. The whole section is new~~
18 Mar 2024	Jay	Done	☑ ~~Updated the latest changes in the Freshdesk~~
Apr 8, 2024	Gildie	Done	**Adjusted the Settings Section and moved it up to the top** **Settings for Reservation and Commission Structure** **Reservation Fee & Refund Settings** ☑ ~~Introduction~~

Last Edited May 2/2024

Date	Reviewer	Status	Activities
			☑ ~~Define Reservation Fee & Specify Reservation Refund Policy~~ ☑ ~~Receive Reservation Payment - Integrate with Stripe~~ ☑ ~~Reservation Notification - Who Gets Notified~~ ☑ ~~Define Reservation Release Policy~~ ☑ ~~Define Email Sender~~ **Commission Settings** ☑ ~~Agent Commission Structure~~ ☑ ~~Agent Payout Structure - Add New Payout Entry~~ ☑ ~~Agent Payout Structure - Edit or Delete~~ ☑ **General Settings** **Tags** ☑ ~~Add New Tags to the Tags List~~ ☑ ~~Edit the Names of Tags in the Tags List~~ ☑ ~~Remove Tags from the Tags List~~
Apr 12, 2024	Nancy	Under review	☐ **Ask jay to add/ Adjust the following in FD** **Settings for Reservation and Commission Structure** **Reservation Fee & Refund Settings** ☐ Introduction ☐ Define Reservation Fee & Specify Reservation Refund Policy ☐ Receive Reservation Payment - Integrate with Stripe ☐ Reservation Notification - Who Gets Notified ☐ Define Reservation Release Policy ☐ Define Email Sender **Commission Settings** ☐ Agent Commission Structure ☐ Agent Payout Structure - Add New Payout Entry ☐ Agent Payout Structure - Edit or Delete ☐ **General Settings**

bildhive

Date	Reviewer	Status	Activities
			Tags ☐ Add New Tags to the Tags List ☐ Edit the Names of Tags in the Tags List ☐ Remove Tags from the Tags List
Jul 31, 2024		Not started	☑ ~~The setting section direct reservation vs sheet management. IPM settings had to be reshaped.~~ ☐ **DR, instead of the Realtors creating the sheet, the buyer fills a widget on the website. There is no reservation but there is an agreement.** ☐ **Direct & Worksheet Reservation Settings. Grace Days. Release for both. You can have a release in two ways… you can have it in the contract or have a mutual release. In high rise, in colling off period, you get ten days… Adjust the different views…; If you don't have grace Days you will manually have to void it. In condo unit there is three views and in lowrise there are two. Map view. Look at that portion of the video. IPM review of settings and different views.** ☐ **!! You can't get the lot premium filters to move?If you do not have any lots with premiums, the Lot Premium filter will remain in Cero and won't move.** ☐ **LOWRISE** ☐ **Tip: if you know the number of Lot you want to review, you can enter it in the search bar. This will open the lot detail card.** ☐ **Lowrise: card view and map view** ☐ **You can click a model and it will show the lots in the siteplan that can carry the Cameron. White overlay shows the available lots where the cameron can fit.** ☐ **When you click a lot you see the models that fit. If you click on any model, it opens the detail card.** ☐ **Filter by 49's or 55's**

Date	*Reviewer*	*Status*	*Activities*
			☐ You can clear elevation. ☐ YOU CAN MAKE A TRANSACTION. ☐ Inventoru=viewing and analyzing information ☐ If you are using the transaction manager, it auto-populates with the lot and model information (when you make a transaction) ☐ If you are not using the transaction, you can update and change the lot status. ☐ When done manually, you can unsell. ☐ Whenever the lock appears, it means it was done via the transaction manager and you need a release agreement. ☐ Price management is more for those who are in charge of price bumps ☐ Talk about the 3 types of view ☐ Card View, Grid View, Stacking or Matrix view. (Change the names.) ☐ Review the settings section. Naming was changed.