Step 1: Create a project (part 1)

3 years ago · Updated

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▼ For Headquarters, Supervisor, Sales Manager user access roles only
View User account types for more info
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Part 1: Complete main information

Projects > + Project

1. Click **Projects** at the Showroom homepage
2. Click **+ Project** at the top-right hand corner
3. Fill up the forms (Info and Location is Compulsory) and click **Create** at the top-right hand corner

Not sure what to enter in the fields? Confused about the descriptions? Refer to the menu sections and description of fields as below.

Projects > (Project Name) > Overview > Edit > Info

- **Status** is referring to the status of the project
  Draft: The project will be not be visible to sales staff & agents
  Ready: Information has been completed, awaiting to be published
  Published: The project can be seen by every user who has access
  Archived: When all units are sold, project can be archived

Deleted: Delete the project

- **Name**: Full name of the project
  Short Name: Shorter version of the full name which you may or may not use

- **Phone**: Contact number for this project or Sales Gallery contact

- **Type**
  Select from **Tenure**, **Property category** and **Property type**

- **Custom Price**
  Use this function to set minimum and maximum price for units within the project
  Note: If you don't fill in, it will automatically detect from your unit list

- **Custom Size**
  Use this function to set a minimum and maximum size for units within the project
  Select between Square Feet or Square Metres for the preferred size unit measurement
  Note: If you don't fill in, it will automatically detect from your unit list

Projects > (Project Name) > Overview > Edit > Location

- Enter the address of the project

Projects > (Project Name) > Overview > Edit > Specifications

- Click **+** to enter the project specifications details.

Projects > (Project Name) > Overview > Edit > Description

- **Title**: Main tagline or branding of the project
  Subtitle: Sub tagline or branding of the project
  Description: More description about the project

Projects > (Project Name) > Overview > Edit > Setup

- **Management**
  Project's Business Unit Owner: Teams that have access to edit the project
  You can set this up later at **Step 6: Add business units*

  Checkbox
  Public Project: Tick to allow agents who do not have account to view sales chart.
  Launch Mode: Set a time limit to key in booking form

Online payment requires approval
ADPL (Advertising Permit and Developer License)

Projects > (Project Name) > Overview > Edit > Booking Setup

- **Loan Tracker**
  View updates about loans after bookings are made

- **Booking Flow**
  Customise your steps for booking flow

- **Email Notification**
  Adjust email notification settings for this specific project, key in the email addresses and hit enter to add the email accordingly (New Booking, Approved Booking & Cancelled Booking)

- **Logo**
  The image that you upload here will appear in the default booking form

- **Reservations/Bookings**
  Bankers Limit: Set the limit to how many bankers for each booking
  Unit Reservation Limit: How many reservations can be made at one time per unit or as known as "Waiting List"

- **New Reservation/Booking Form**
  Default Reservation/Booking Form Status: Select between Reserved or Booked as the first initial status of any booking that is made

  Checkboxes
  Allow Business Unit Leaders, Staffs & Agents to change Reservation/Booking Status in the Form: Anyone with access can change the initial status when making a new booking

  Allow Business Unit Leaders & Staffs to change SPA value or tier pricing dropdown in the form: Anyone (excluding agents) with access can change the SPA value or tier pricing dropdown when making a new booking

  Allow Agents to change tier pricing dropdown in the form: When making a new reservation, allow sales agent to select tier pricing

  Show all purchaser fields in the form (advance): This includes gender, race, birthdate, marital status, occupation and nationality that will be shown when making a new reservation

- **Reservation/Booking Overview Page**

  Checkbox
  Allow agents to manage purchasers when reservation/booking status is reserved: Allow Sales Agent to edit purchaser details

  Allow agents to change payment info when reservation/booking status is reserved: Allow Sales Agent to edit payment info

- **Booking Printing**
  Print type: Select Default to use our available booking form. Select None if printing is not required. Tick 'Enable PDF' to allow pdf format to be downloaded and shared to banker.
  Print Clause: Add text for your own terms and conditions to be displayed at the booking form for printing
  Custom Watermark: The text in this field will appear at the purchaser's IC image at the time of upload

- **Autofill booking purchaser from URL**
  Only applicable to certain subscribers. Kindly contact help@mhub.my for more information

Projects > (Project Name) > Overview > Edit > Payment Setup

- Choose your desired bank followed by the bank account number. Compulsory payment reference and attachment field.

Projects > (Project Name) > Overview > Edit > Sales Chart Setup

- **Sales Chart**
  Disabled: Sales chart will be disabled for this project
  Pivoted by Position: Arrange units sales chart by actual positions
  Pivoted by Layout: Arrange units in sales chart by layout types
  Pivoted by Position Layout: Arrange units on sales chart by actual positions AND layout types
  Saleschart App: Select only if you have subscribed to customised site plan

Projects > (Project Name) > Overview > Edit > Marketplace

Projects > (Project Name) > Overview > Edit > Booking Custom Fields

Projects > (Project Name) > Overview > Edit > Tier Pricing

Projects > (Project Name) > Overview > Edit > Access

- **Nett selling price:** Set the access for price alterations

Projects > (Project Name) > Overview > Edit > Reminder Letter Setting

Projects > (Project Name) > Overview > Edit > Currency Settings

Projects > (Project Name) > Overview > Edit > API Options

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Related articles

Step 2: Create a project (part 2)

Showroom Project Settings - Updated UI/UX

Step 6: Add business units

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What is an Audience Group?