

# Inventory Upload

## Overview

The **Inventory Upload** section allows you to bulk import units via an Excel/CSV template, and to reprice existing units in bulk.

## How to Access

Go to **Setup** → **Inventory Upload**.

### UPLOAD SCRIPTS

The screenshot shows the 'File Templates' section with four buttons: REPRICING TEMPLATE, UNIT TEMPLATE, INSTALMENT TEMPLATE, and FACILITIES TEMPLATE. Below these is a note: 'Fill the files. Remove the first row and save it as CSV "Comma Delemeted"'. The 'Browse' section features a 'Choose File' button, a 'No file chosen' message, and 'Allowed File Types: CSV'. A note specifies: 'Project Price Type Must Be Either "meter\_price" or "full" - case sensitive conditions applied'. There are four radio buttons for 'Repricing', 'Unit', 'Instalment', and 'Facilities'. A 'SUBMIT' button is at the bottom.

## Two Templates Available

Template	Purpose
Inventory Template	Bulk upload new units into the CRM.

Template	Purpose
<b>Repricing Template</b>	Update prices of existing project units in bulk — download, update the green columns only, delete first row, save as CSV UTF-8, and upload. Only affects <b>available</b> and <b>hidden</b> units.

# Before You Upload — Set Up Inventory Settings First

Before filling in the template, configure these values in **Inventory Settings** — the upload will fail if template values don't match exactly:

Setting	Description	Example Values
<b>Segment Positions</b>	Position values used in the template.	Open Air, Sunny Side
<b>Segment View</b>	View values used in the template.	Pool View, Garden View, CityScape, Panorama, Pyramid View
<b>Finishing</b>	Finishing values used in the template.	Fully Finished, Core & Shell, Not Finished
<b>Phase</b>	Phase values used in the template.	Phase 1, Phase 2
<b>Unit's Contents</b>	Room types (comma-separated).	Hall, Bedroom, Bathroom, Kitchen, Reception, Garage, Pool
<b>Units Type</b>	Unit types (comma-separated).	Villa, Twin, Apartment, Duplex, Roof, 1 Bedroom, 2 Bedroom
<b>Units Code</b>	Unit codes (comma-separated).	A, B, C
<b>Additional Meter Prices</b>	Extra meter names (comma-separated).	outdoor dining, garden, roof

# Inventory Template — Column Reference

Column	Required	Notes
<b>Unit Name</b>	<input type="checkbox"/>	Unit name.

Column	Required	Notes
Unit Floor	<input type="checkbox"/>	Floor number or name.
Unit Price	<input type="checkbox"/>	Unit price (full price or meter price depending on project type).
Unit Details	<input type="checkbox"/>	Unit description.
Unit Status	<input type="checkbox"/>	Must be exactly one of: Pending, Under Construction, Completed, Resale.
View		Write any view value — must be added to Inventory Settings first.
Segment Name	<input type="checkbox"/>	Segment name.
Segment Type	<input type="checkbox"/>	Unit type (e.g., Apartment, Villa) — must be added to Inventory Settings first.
Segment Space	<input type="checkbox"/>	Space in sqm.
Segment Desc		Segment description.
Segment View		Must be added to Inventory Settings first.
Segment Finishing		Must be added to Inventory Settings first.
Building Name	<input type="checkbox"/>	Building name.
Building Desc		Building description.
Building Details		Building details.
Project Name	<input type="checkbox"/>	Must match existing project name <b>exactly</b> .
Project Desc		Project description.
Project Code		Can be left blank.
Project Location Name	<input type="checkbox"/>	Project location.
Project Price Type	<input type="checkbox"/>	Either full or meter_price.
Garden Space		Garden space in sqm.
Roof Space		Roof space in sqm.
Position		Must be added to Inventory Settings first.
Premium %		Price premium percentage.
Garden Price %		Only used if Project Price Type is meter_price. Enter 0 if not applicable.

Column	Required	Notes
<b>Roof Price %</b>		Only used if Project Price Type is <code>meter_price</code> . Enter <code>0</code> if not applicable.
<b>Unit Code</b>		Can be left blank.
<b>Hall</b>		Enter count if exists, <code>0</code> if not.
<b>Bedroom</b>		Enter count if exists, <code>0</code> if not.
<b>Bathroom</b>		Enter count if exists, <code>0</code> if not.
<b>Kitchen</b>		Enter count if exists, <code>0</code> if not.
<b>Reception</b>		Enter count if exists, <code>0</code> if not.
<b>Pool</b>		Enter count if exists, <code>0</code> if not.
<b>Segment Phase</b>		Must be added to Inventory Settings first.
<b>Unit Delivery Date</b>		Can be left blank.
<b>Additional Meter Name</b>		Must be added to Inventory Settings first.
<b>Additional Meter Area</b>		Area in sqm.
<b>Additional Meter Price</b>		Price per meter for this additional area.

## Price Type Logic

**Full Price:** The Unit Price column is the total unit price as-is.

### Meter Price:

- Unit total price = Unit Price × Segment Space
- Garden price = Garden Price % × Meter Price × Garden Space
- Roof price = Roof Price % × Meter Price × Roof Space
- Enter `0` for Garden Price % and Roof Price % if not applicable.

## Adding Units to an Existing Project

If you want to add more units to an existing project via upload, all project/building/segment values in the file must **exactly match** the existing values already in the CRM.

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# File Preparation Steps

1. Go to **Setup → Inventory Upload** and download the template.
  2. Fill in the data following the column reference above.
  3. **Delete the first row** (the example row that comes with the template).
  4. Save as **CSV UTF-8**.
  5. Upload the file.
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## Repricing Template

Use this when you have an existing project and want to update the prices of all units at once.

## How to Download

Go to **Setup → Inventory Upload** — the system will ask you to select which project you want to download the repricing template for. After selecting the project, the template downloads pre-filled with all that project's existing units.

## Steps

1. Download the **Repricing Template** from **Setup → Inventory Upload**.
2. The template comes pre-filled with your existing units.
3. Update **only the columns highlighted in green** — these are the editable price fields.
4. **Delete the first row** (the example row).
5. Save as **CSV UTF-8**.
6. Upload the file.

## Editable Fields (Green Columns)

The green columns are the only ones you can edit:

Column	Description
Price	Updated unit price.
Space	Updated unit space in sqm.

Column	Description
<b>Floor</b>	Updated floor number or name.
<b>Roof Space</b>	Updated roof space in sqm.
<b>Garden Space</b>	Updated garden space in sqm.
<b>View</b>	Updated view type — must exist in Inventory Settings.
<b>Bedroom</b>	Updated bedroom count.
<b>Bathroom</b>	Updated bathroom count.
<b>Finishing</b>	Updated finishing type — must exist in Inventory Settings.
<b>Unit Delivery Date</b>	Updated delivery date.
<b>State</b>	Updated unit state.

The following columns are **read-only** (grey) and must not be changed:

- Unit Id, Name, Segment Name, Segment Type, Building, Project

“ ⚠ Only the columns highlighted in green can be edited — do not modify any other columns or the upload will fail.

“ ☐ The repricing template only affects **available** and **hidden** units — sold or reserved units are never modified.

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# Inventory Template — File Preparation

“ ☐ Same process applies to both the Inventory Template and the Repricing Template:

1. Fill in the data.
  2. **Delete the first row** (the example row that comes with the template).
  3. Save as **CSV UTF-8**.
  4. Upload.
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