

AlchemyRE User Guide

Version 2.0 - October 2024

Table of Contents

1. [Introduction](#)
2. [Getting Started](#)
3. [GTRM Integration](#)
4. [WordPress Plugin Interface](#)
5. [Media Explorer](#)
6. [Listing Management](#)
7. [Approval Workflows](#)
8. [Email Notifications](#)
9. [Feed Generation](#)
10. [Company Rules](#)
11. [User Management](#)
12. [Troubleshooting](#)
13. [FAQ](#)

Introduction

AlchemyRE is a comprehensive real estate listing management system designed for property management companies. It seamlessly integrates with GTRM (Glenwood's property management system), provides automated feed generation for listing portals, and includes robust approval workflows to ensure listing accuracy.

Key Features

- **Automated GTRM Integration:** Real-time synchronization with your property management system
- **WordPress Plugin:** Manage listings directly from your WordPress dashboard
- **Media Explorer:** Advanced media management with S3 integration
- **Multi-Step Approvals:** Ensure listing accuracy with configurable approval chains
- **Automated Feeds:** Generate StreetEasy and NYBits feeds automatically
- **Email Notifications:** Stay informed at every step of the process
- **Company Rules:** Automated validation and business logic enforcement

Getting Started

System Access

AlchemyRE consists of three main interfaces:

1. **WordPress Admin Panel** - Primary interface for property managers
2. **Media Explorer** - Standalone media management interface
3. **Email Notifications** - Automatic updates sent to your inbox

User Roles

- **Agent:** Can submit listings and changes for approval
- **Supervisor:** Reviews and approves Agent submissions
- **Manager:** Final approval authority
- **Administrator:** Full system access and configuration

First Login

1. Navigate to your WordPress admin panel
 2. Look for the **AlchemyRE** menu item in the sidebar
 3. Enter your credentials provided by the system administrator
 4. You'll see the AlchemyRE Dashboard
-

GTRM Integration

How It Works

AlchemyRE automatically receives listing data from GTRM through secure webhooks:

1. **Real-time Updates:** Changes in GTRM are instantly reflected in AlchemyRE
2. **Two-way Sync:** Approved changes can be pushed back to GTRM
3. **Data Validation:** All incoming data is validated against company rules
4. **Audit Trail:** Complete history of all GTRM transactions

GTRM Data Flow

GTRM System → XML Webhook → AlchemyRE Parser → Database → WordPress Display

Monitored Fields

- Unit availability status
 - Rental prices
 - Unit descriptions
 - Amenities
 - Building information
 - Agent assignments
-

WordPress Plugin Interface

Note: Coming in Phase 2 Week 4

Dashboard Overview

The WordPress plugin provides a clean, intuitive interface within your existing WordPress admin:

Main Dashboard

[illegible]

AlchemyRE Dashboard

[illegible]

Quick Stats

Active Listings: 52

  Pending Approvals: 3

Feed Status: Active

⌘ ⌘ Last GTRM Sync: 2 mins ago

[illegible]

Recent Activity

Unit 4B approved by John (10:32 AM)

  New listing from GTRM: Unit 7A (10:28)

StreetEasy feed generated (10:15 AM)

[illegible]

Navigation Menu

AlchemyRE (main menu)

- Dashboard
- Listings
 - All Listings
 - Add New
 - Pending Approval
 - Import from GTRM
- Media Explorer
- Feeds
 - StreetEasy
 - NYBits
 - Feed Settings
- Approvals
 - Approval Queue
 - My Approvals
 - Approval History
- Reports
- Settings

Listing Management Interface

List View

[All Listings](#) [\[Add New\]](#)

[Search: _____] [Filter: All] [Status: Active]

Unit Building Price Status Actions

<< >>

| | | | | |
|-----|-----------|---------|---------|-----------|
| 4B | The Bel | \$3,500 | Active | Edit View |
| 7A | The Grand | \$4,200 | Pending | Edit View |
| 12F | Paramount | \$5,800 | Active | Edit View |

Bulk Actions: [Select Action] [Apply] Page 1 of 6

Edit Listing View

Edit Listing: Unit 4B - The Bel Aire [Publish]

Basic Information

,

Unit Number: 4B

Building: [The Bel Aire]

Monthly Rent: \$[3,500]

Bedrooms: [2]

Bathrooms: [1.5]

Square Feet: [1,200]

4

Description

[Rich text editor toolbar]

Stunning 2BR apartment with panoramic city views...

[illegible]

[?](#) [\[Save Draft\]](#) [\[Submit for Approval\]](#) [\[Preview\]](#) [\[Cancel\]](#)

Approval Queue Interface

Approval Queue (3 items pending)

Unit 7A - Price Change

Submitted by: Jane Smith (Agent)

Change: \$4,200 - \$3,900

Reason: Market adjustment

[??](#) [\[View Details\]](#) [\[Approve ??\]](#) [\[Reject ??\]](#) [\[Comment =??\]](#) [??](#)

Unit 12F - New Photos

Submitted by: Mike Johnson (Agent)

 Change: Added 5 new photos

[?? \[View Details\]](#) [\[Approve ?\]](#) [\[Reject ?\]](#) [\[Comment =?\]](#) [??](#)

[illegible]

Media Explorer

Overview

The Media Explorer is a powerful media management system integrated with Amazon S3 for reliable, scalable storage.

Main Interface

Media Explorer

🔍 Folders 🔍 Files

[illegible]

?? = ? Buildings ?? View: [Grid ?] Sort: [?] ??

[illegible]

?? =? The Grand ??,???,???,???? ??

?? = ? Paramount **???** **??**

$\frac{1}{2} \times \frac{1}{2} = \frac{1}{4}$ Floor Plans
 $\frac{1}{2} \times \frac{1}{2} \times \frac{1}{2} = \frac{1}{8}$
 $\frac{1}{2} \times \frac{1}{2} = \frac{1}{4}$
 $\frac{1}{2} \times \frac{1}{2} = \frac{1}{4}$
 $\frac{1}{2} \times \frac{1}{2} = \frac{1}{4}$
 $\frac{1}{2} \times \frac{1}{2} = \frac{1}{4}$

☐☐ = ☐ Amenities ☐☐☐ 4B-1☐4B-2☐4B-3☐4B-4☐ ☐☐

?? =? Virtual Tours ?? ????<????<????<????\$??

?
?

?
?
?

??

[illegible]

4B-54B-6PlanTour

Storage Used: 4444444444444444

8.2 GB / 10 GB

[illegible]

Features

1. Upload Management

- **Drag & Drop:** Simply drag files into the browser window
- **Batch Upload:** Upload multiple files simultaneously
- **Progress Tracking:** Real-time upload progress bars
- **Auto-Organization:** Files automatically sorted by type and property

2. Image Processing

- **Auto-Resize:** Creates multiple sizes for web optimization
- **Watermarking:** Optional watermark application
- **Format Conversion:** Automatic WebP generation for faster loading
- **Metadata Preservation:** Maintains EXIF data for professional photos

4. Organization Tools

- **Smart Folders:** Automatically organize by building, unit, and type
- **Tagging System:** Add custom tags for easy searching
- **Bulk Operations:** Select multiple files for batch actions
- **Version Control:** Keep track of image versions and edits

5. Integration Features

- **Direct WordPress Integration:** Insert images directly into listings
- **Feed Export:** Automatically include in StreetEasy/NYBits feeds
- **CDN Distribution:** Fast global delivery via CloudFront
- **API Access:** Programmatic access for third-party integrations

Media Types Supported

| Type | Formats | Max Size | Processing |
|---------------|---------------------|----------|-----------------------------|
| Images | JPG, PNG, GIF, WebP | 50 MB | Resize, optimize, watermark |
| Floor Plans | PDF, JPG, PNG | 25 MB | Convert to standard sizes |
| Virtual Tours | MP4, 360° images | 500 MB | Streaming optimization |
| Documents | PDF | 10 MB | Text extraction for search |

Quick Actions Menu

Right-click any media item for quick actions:

- **Preview:** Quick full-size preview

- **Edit:** Open in image editor
- **Download:** Download original file
- **Copy Link:** Get shareable link
- **Add to Listing:** Attach to a property listing
- **Set as Primary:** Make primary image for listing
- **Delete:** Remove from system

Listing Management

Creating a New Listing

1. **Navigate to Listings ? Add New**
2. **Fill in Required Fields:**
 - Unit Number
 - Building Selection
 - Monthly Rent
 - Bedrooms/Bathrooms
 - Availability Date
3. **Add Description:**
 - Use the rich text editor
 - Include key selling points
 - Highlight unique features
4. **Upload Media:**
 - Click "Open Media Explorer"
 - Select or upload photos
 - Arrange in preferred order
 - Set primary image
5. **Review and Submit:**
 - Preview the listing
 - Check company rule validations
 - Submit for approval

Editing Existing Listings

1. Find the listing in the listings table
2. Click "Edit" in the actions column
3. Make necessary changes
4. Submit changes for approval (if required)

Bulk Operations

Select multiple listings to:

- Update status (Active/Inactive)
- Change assigned agent

- Export to CSV
- Generate marketing materials
- Schedule for feed inclusion

Approval Workflows

Understanding Approval Chains

AlchemyRE uses configurable multi-step approval workflows to ensure listing accuracy:

Standard Workflow (2-step)

Agent Submits → Supervisor Reviews → Manager Approves → Published
 ↩ (reject) ↩ (reject)
 Back to Agent Back to Agent

Fast Track Workflow (1-step)

Agent Submits → Supervisor Approves → Published
 ↩ (reject)
 Back to Agent

Submitting for Approval

1. Make your changes in the listing editor
2. Click "Submit for Approval"
3. Add a comment explaining the changes
4. Select workflow type (if options available)
5. Click "Submit"

Reviewing Approvals

If you're an approver, you'll see pending items in:

- The dashboard notification area
- The Approvals menu
- Email notifications

To review:

1. Click on the pending approval
2. Review the changes (highlighted)
3. Check the submitter's comments
4. Either:
 - **Approve:** Move to next step or publish
 - **Reject:** Send back with feedback
 - **Request Info:** Ask for clarification

Tracking Approval Status

View the status of your submissions:

- **Pending:** Awaiting review
 - **In Review:** Currently being reviewed
 - **Approved:** Moving to next step
 - **Published:** Live on the site
 - **Rejected:** Returned for revision
-

Email Notifications

Notification Types

AlchemyRE sends automatic email notifications for:

For Submitters

- **Submission Confirmed:** Your changes were submitted
- **Approval Update:** Your submission was approved
- **Rejection Notice:** Changes needed (with feedback)
- **Published Confirmation:** Your listing is live

For Approvers

- **New Submission:** Action required
- **Reminder:** Pending items after 24 hours
- **Escalation:** Items pending over 48 hours

Email Format Example

Subject: [AlchemyRE] New Approval Request - Unit 4B Price Change

Hello Sarah,

A new approval request requires your attention:

Listing: Unit 4B - The Bel Aire

Submitted by: Jane Smith (Agent)

Type: Price Change

Change Summary: Monthly rent adjusted from \$3,500 to \$3,200

Details:

- Previous: \$3,500/month

- New: \$3,200/month

- Reason: Market adjustment for faster rental

[Review in AlchemyRE] [Approve] [Reject]

This request has been pending for: 2 hours
AlchemyRE Listing Management System
This is an automated message. Do not reply to this email.

Managing Email Preferences

Navigate to Settings → Email Preferences to configure:

- Notification frequency (immediate, digest, daily summary)
 - Types of notifications to receive
 - CC additional team members
 - Quiet hours (no emails during specified times)
-

Feed Generation

Supported Platforms

StreetEasy Feed

- **Format:** XML with custom schema
- **Frequency:** Every 4 hours
- **Fields:** All required StreetEasy fields plus optional enhancements
- **Media:** Up to 20 photos per listing
- **Validation:** Pre-submission validation against StreetEasy rules

NYBits Feed

- **Format:** JSON API
- **Frequency:** Real-time updates
- **Fields:** Comprehensive listing data
- **Media:** Unlimited photos with CDN URLs
- **Features:** Supports video tours and 3D walkthroughs

Feed Management

Automatic Generation

Feeds are automatically generated based on:

- Active listing status
- Completed approval workflows
- Media availability

- Company rules compliance

Manual Controls

- **Force Regeneration:** Update feeds immediately
- **Preview:** See exactly what will be sent
- **Exclude Listings:** Temporarily remove specific units
- **Schedule:** Set custom generation times

Feed Status Dashboard

Feed Status

StreetEasy

Status: Active

Last Update: 10:15 AM (45 mins ago)

Next Update: 11:15 AM

Listings Included: 48 of 52

[View Feed] [Force Update] [Download XML]

NYBits

Status: Active

Last Sync: 10:58 AM (2 mins ago)

API Status: Connected

Listings Synced: 52 of 52

[View Details] [Test Connection] [View Logs]

Company Rules

Automated Validations

Company rules automatically enforce business logic:

Pricing Rules

- Minimum rent requirements by neighborhood
- Maximum rent caps by unit type
- Automatic fee calculations
- Security deposit standards

Content Rules

- Required description length
- Prohibited terms and phrases
- Mandatory disclosures
- Fair housing compliance

Media Rules

- Minimum photo requirements
- Watermark enforcement
- Resolution standards
- File naming conventions

Rule Violations

When a rule is violated:

1. **Warning:** Non-critical issues highlighted
2. **Block:** Critical issues prevent submission
3. **Auto-Correct:** Some issues fixed automatically
4. **Override:** Managers can override with reason

Custom Rule Configuration

Administrators can configure rules in Settings → Company Rules:

- Set minimum/maximum values
- Define required fields
- Create conditional rules
- Set up automatic calculations

User Management

Account Types

Individual Accounts

- Personal login credentials
- Role-based permissions
- Activity tracking
- Email preferences

Team Management

- Create teams (e.g., "Leasing Team A")

- Assign team leaders
- Distribute workload
- Track team performance

Permission Levels

| Action | Agent | Supervisor | Manager | Admin |
|-------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| View Listings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Create Listings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit Own Listings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit Any Listing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Approve Changes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Configure Rules | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| System Settings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Adding New Users

1. Navigate to Settings ☐ Users
2. Click "Add New User"
3. Enter user information:
 - Name and email
 - Role selection
 - Team assignment
 - Notification preferences
4. User receives welcome email with login instructions

Troubleshooting

Common Issues and Solutions

Listings Not Appearing

- **Check:** Listing status (must be "Active")
- **Verify:** Approval workflow completed
- **Ensure:** No rule violations blocking publication
- **Review:** Feed generation schedule

GTRM Sync Issues

- **Verify:** Webhook URL is correct in GTRM
- **Check:** Network connectivity
- **Review:** Error logs in Settings → System Logs
- **Test:** Manual sync from GTRM Integration page

Media Upload Failures

- **Check:** File size limits
- **Verify:** Supported file formats
- **Ensure:** Adequate storage space
- **Test:** Internet connection speed

Approval Workflow Stuck

- **Review:** Current step and assigned approver
- **Check:** Approver's email notifications
- **Verify:** No system rules blocking progression
- **Option:** Administrator can force advancement

Error Messages

| Error | Meaning | Solution |
|--------------------------|-------------------------------|---------------------------------|
| "Validation Failed" | Company rule violation | Review rules and adjust listing |
| "Sync Error 401" | Authentication issue | Check GTRM credentials |
| "Upload Timeout" | Large file or slow connection | Reduce file size or retry |
| "Approval Pending" | Waiting for approver action | Contact assigned approver |
| "Feed Generation Failed" | Format or data issue | Check required fields |

Getting Help

1. **In-App Help:** Click the "?" icon for contextual help
2. **Documentation:** Access this guide from Help menu
3. **Support Tickets:** Submit via Settings → Support
4. **Email:** support@alchemyre.com
5. **Emergency:** Call support hotline (for critical issues)

FAQ

General Questions

Q: How often does GTRM sync with AlchemyRE? A: GTRM sends real-time updates via webhook. Changes appear within seconds.

Q: Can I bypass the approval workflow? A: Only administrators can bypass workflows, and all bypasses are logged.

Q: What happens to rejected changes? A: They return to draft status with feedback. The submitter can revise and resubmit.

Media Questions

Q: What's the maximum file size for photos? A: Individual photos can be up to 50MB. Videos up to 500MB.

Q: Are images automatically optimized? A: Yes, images are automatically resized and optimized for web delivery.

Q: Can I bulk upload photos? A: Yes, drag and drop multiple files or entire folders into Media Explorer.

Feed Questions

Q: How quickly do changes appear on StreetEasy? A: Our feed updates every 4 hours. StreetEasy typically processes within 1-2 hours.

Q: Can I exclude a listing from feeds temporarily? A: Yes, use the "Feed Settings" on any listing to exclude it.

Q: What if StreetEasy rejects our feed? A: You'll receive an email alert with the specific issue to address.

Workflow Questions

Q: Can I recall a submission? A: Yes, if it hasn't been reviewed yet. Click "Recall" in your submissions list.

Q: What happens if an approver is out of office? A: After 48 hours, approvals escalate to the next level automatically.

Q: Can I see who made what changes? A: Yes, the audit trail shows complete history with timestamps and users.

Technical Questions

Q: What browsers are supported? A: Chrome, Firefox, Safari, and Edge (latest versions).

Q: Is there a mobile app? A: The WordPress interface is mobile-responsive. Native app coming in 2025.

Q: How is data backed up? A: Automatic daily backups with 30-day retention. Point-in-time recovery available.

Appendix

Keyboard Shortcuts

| Shortcut | Action |
|------------------|---------------------|
| Ctrl/Cmd + S | Save draft |
| Ctrl/Cmd + Enter | Submit for approval |
| Ctrl/Cmd + P | Preview listing |
| Ctrl/Cmd + / | Open help |
| Esc | Cancel/Close dialog |

Status Codes

- **100:** Draft - Work in progress
- **200:** Submitted - Awaiting approval
- **300:** In Review - Being processed
- **400:** Approved - Moving forward
- **500:** Published - Live on site
- **600:** Rejected - Needs revision
- **700:** Archived - No longer active

Glossary

- **GTRM:** Glenwood's Transaction and Reporting Management system
- **Webhook:** Automated data transfer triggered by events
- **CDN:** Content Delivery Network for fast media serving
- **RBAC:** Role-Based Access Control
- **API:** Application Programming Interface
- **S3:** Amazon Simple Storage Service
- **XML:** Extensible Markup Language (feed format)
- **JSON:** JavaScript Object Notation (data format)

For technical documentation and developer resources, see the [Developer's Handbook](#)
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