



Envision Release 4.0.2.0- Builders

Support for Option Disclosures

The objective of this feature is to give the ability to tie disclosures to any given option. Once a disclosure is linked to a product, it is printed as part of the Contract Addendum.

Manage Option Disclosures at the same level that categories are defined

The screenshot shows the 'Manage Organization' interface. On the left, there is a tree view under 'Select a Level' with 'NHTtestCorp' expanded to show six regions: NHTtestRegion1 through NHTtestRegion6. On the right, the 'Manage Options and Inventory' section for 'NHTtestCorp [CORP]' shows '158 options created at this level' and buttons for 'Manage Options', 'Link Products', and 'Generate QR Codes'. Below that, the 'Design Center' and 'Other Actions' sections are visible, with 'Manage Option Disclosures' highlighted in yellow.

Manage Disclosures Page

1. View all created disclosures
2. Edit/Delete current disclosures

The screenshot shows the 'Manage Option Disclosures' page. At the top, there is a navigation bar with 'Help', 'Manage My Account', 'Manage Users', and 'Logout'. Below the header, the page title 'Manage Option Disclosures' is shown with a red box around a '+' icon. The main content area includes a search section with two input fields: 'Name' (with placeholder 'Enter disclosure name') and 'Option No./Name' (with placeholder 'Enter option name or number'). Below the search fields is a table with the following columns: Name, File Name / Text, Assigned Options, Last Updated, and Actions. The table contains five entries. A red box highlights the 'Actions' column for each row, which contains icons for edit, delete, and link. At the bottom of the table, it says 'Showing 1 to 5 of 5 entries'.

Name	File Name / Text	Assigned Options	Last Updated	Actions
disclosure 1	test_renato_ContractAddendum.PDF	1030	05/17/2018 01:12PM	[edit] [delete] [link]
disclosure 1	test_renato_ContractAddendum.PDF		05/17/2018 01:11PM	[edit] [delete] [link]
disclosure 2	test_renato_ContractAddendum.PDF		05/17/2018 01:11PM	[edit] [delete] [link]
fdf	dffhdffhdhdfddfd	BonusRoom2f	05/17/2018 01:15PM	[edit] [delete] [link]
test	test	BackyardSPA	05/17/2018 01:12PM	[edit] [delete] [link]



- 3. Create a new disclosure
 - a. Disclosure Name
 - b. Upload a PDF OR Rich text editor
 - c. Save

The screenshot shows a 'Create Disclosure' window with a close button (X) in the top right. The main content area is titled 'Enter Disclosure Information' and contains the following fields:

- Name ***: A text input field.
- Type**: Two radio buttons, 'PDF' (selected) and 'Rich Text Editor'.
- File ***: A file upload field with a '+' icon on the right. Below it, text reads '(Accepted file types: PDF; 10mb Max)'.
- Save**: A dark button at the bottom.

- 4. Link a disclosures to one or more options
 - a. Select one OR multiple options to link the disclosure to
 - b. Save

The screenshot shows the 'Link Disclosure to Options' interface. At the top, it says 'Manage Disclosures: Andrea in Test'. Below is a 'Search Options' section with filters for 'Option Category Group' (All), 'Option Category' (All), and 'Option No./Name' (empty). There are 'Search', 'Clear', and 'X' buttons. Radio buttons for 'Any' (selected), 'Assigned', and 'Unassigned' are present. A note says 'Enter "*" to match any characters (wildcard)'. Below is a table with columns: 'Assign', 'Owner', 'Option No.', and 'Option Name'. The table lists four options under 'NewCatGroup: D':

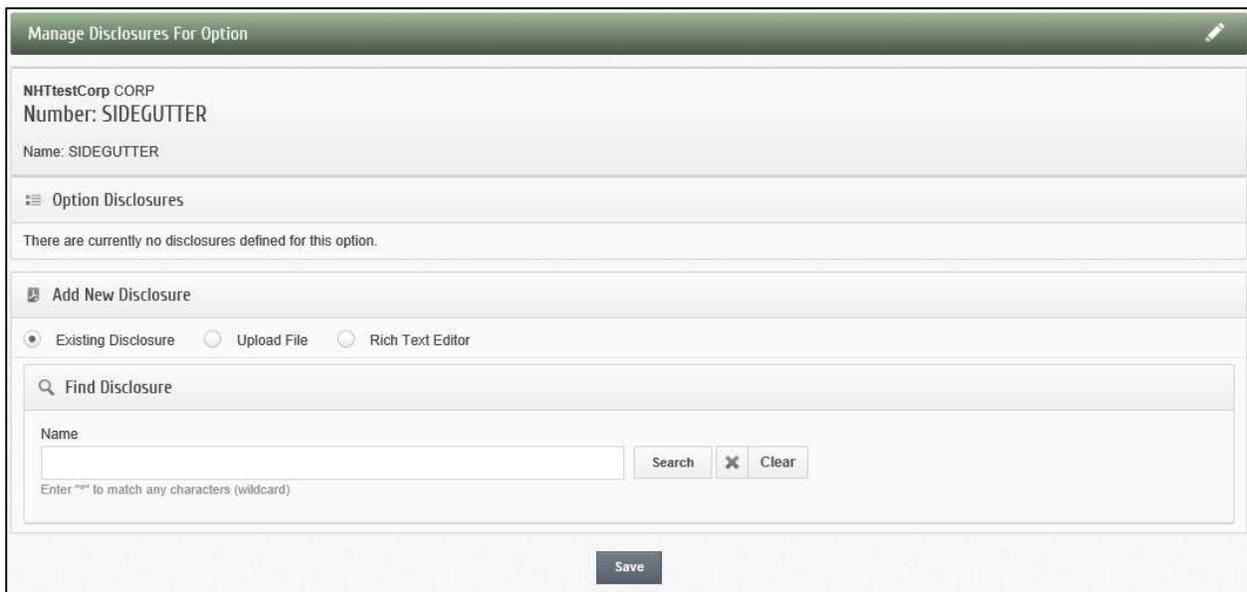
Assign	Owner	Option No.	Option Name
<input type="checkbox"/>	NHTTestCorp: NHTTestRegion1: NHTTestDivi...	12x36Porch	12x36Porch
<input type="checkbox"/>	NHTTestCorp: NHTTestRegion1: NHTTestDivi...	3CARGARAGE	3CARGARAGE
<input type="checkbox"/>	NHTTestCorp: NHTTestRegion1: NHTTestDivi...	BackyardSPA	BackyardSPA
<input type="checkbox"/>	NHTTestCorp: NHTTestRegion1: NHTTestDivi...	BathRoom4	Bathroom #4 @2nd floor

At the bottom, it says 'Showing 1 to 20 of 49,100 entries' and has 'Previous', 'Page 1 of 2455', 'Go', and 'Next' buttons. A 'Select All' button with a green checkmark is on the left, and a 'Save' button is on the right.



Link an Option to Disclosure(s)

1. On any option, click the top right icon to link a disclosure to the option OR create a new disclosure.
2. Select existing disclosure to find a current disclosure
Note: You can link multiple disclosures to one option
3. Select Upload file or Rich Text Editor to create a new disclosure
Note: A disclosure created on a specific option will still be stored in the Option Disclosure Manager and therefore available to link to other options.
4. Save



Additional Feature Information

- Disclosures can NOT be sent through the feed or assigned
- Disclosures are NOT sent back through Buyer Webservices
- If multiple disclosures are linked to an option all disclosures will print
- If multiple options have the SAME disclosure, that disclosure will only print once.



Add Designed Notes columns to Selection Summary by Buyer report

Selections Summary: Issue 10848

NHTTestCorp
NHTTestDivision37: Gina Plan 8772
10848, Issue (Buyer No. 10848, Home No. 10356, Lot No. 15992)
Category Group: All
Category: All
Option Type: All
Standard/Upgrade: Both
Structural: All
Cutoff Stage: All

Option Number	Option Name	Qty	Price	Option Type	S
Whole House: Flooring: Carpet: Shag					
Shag2	Shag 2	1	\$200.00	Normal	U
Whole House: Flooring: Tile					
764	Test option - existing, now suppres price	1	\$78.00	Normal	U
<i>Color Note: bright</i> <i>Location Note: everywhere</i> <i>Style Note: stylish</i> <i>Other Note: other</i>					
ArtDecoURLUpload-edited	76683 FF			76683 Fire Fox	
DalTile	CV1213131P			Grey Stone CV12	

Set Selections Summary by Buyer Criteria

Buyer: 10848, Issue (10848)

Room: All

Category Group: All

Category: All

Option Type: All

Standard / Upgrade: Both

Structural Options: All

Cutoff Stage: All

Price:

Quantity:

Notes:

Show Products:

Notable Bug Fixes

1. **EDC/EDC2/DCM:** Ability to accept complex passwords (*ability to include special characters*)