



Envision Feature in Training 4.14.0.0 – Builders

DCM/EDC: The ability to select an Option Multiple times

This feature will allow an option to be selected multiple times from the Add Selections page. This will allow for the same option to be selected with different attributes on it (primarily a different product, but can be different attributes, notes or price) Additionally the confirmed tag on the selection will become a button that can be clicked to open a modal and allow you to edit the confirmed selections right from the Add Selections page. Here is a list of the highlights/ changes that come with this feature.

- DCM: Add Selections Page
 - Options that have been selected already will still be selectable on the Add Selections page
 - The confirm tag will be updated with the following changes:
 - It will display how many times the option has been confirmed (1 Confirmed, 2 Confirmed, etc.)
 - The flag will become a button that will be a hover/clickable and will pop up a modal that will allow the previously confirmed options to be edited
- DCM: Confirmed Selections Page
 - There will be a row for each unique selection of that option (Example – if an option I selected 3 times, it will display as 3 separate rows)
- DCM: Buyer Selections Updates
 - XML schema: There will be a transaction ID attribute added to each transaction. This will allow your service to identify which transaction is being edited/deleted if changes are made to the transaction.
 - The same option can be submitted multiple times – this would mean your backend DB would need to be set up to receive the same option selected multiple times.
- DCM: Reports
 - Selection Summary by Buyer
 - Buyer Activity (confirmed options)
 - Option Selection Across Homes
- EDC: Finalized Selections Page
 - If an option is selected multiple times – the finalized selections page will show a tile for each unique option selection. (Example – the option is selected 3 times – there will be a 3 tiles, one for each selection)

DCM – Add Selections Page

< Add Selections

Design Checklist
Wishlist
Visualizer Scenes
Add Selections
Floor Plan
Confirmed Selections
History

| | | | | | | |
|---------------------|----------------|----------|-------------|-----------------|------------------|--------|
| Designer Collection | Category Group | Category | Subcategory | Option Name/No. | Product Name/No. | |
| All | Flooring | All | All | TILE0 | | Search |

Clear

Confirm Selections
Wishlist Selections
Standard options only
Wishlisted only
Confirmed only
Expand All

Flooring

| | | | | |
|--------------------------|--|---|--|--|
| <input type="checkbox"/> | | <div style="background-color: #f0f0f0; padding: 2px;"> Standard Tile QTY: 1 \$0.00 </div> <div style="padding: 2px;"> Option #: TILE00 2 Confirmed </div> | | |
| Linked Products | | <input type="radio"/> Fibra Rectified Color Body Porcelain | <input type="radio"/> #FibraLinen12x24 (Linen) by Arizona Tile | |

| | | | | |
|--------------------------|--|--|---|--------------------|
| <input type="checkbox"/> | | <div style="background-color: #f0f0f0; padding: 2px;"> Tile Level 1 QTY: 1 \$800.00 </div> <div style="padding: 2px;"> Option #: TILE01 </div> | | |
| Linked Products | | <input type="radio"/> CashmereBL91 | <input type="radio"/> #BL909121P2 (Belmar) by AmericanOlean | Sales Notes |

DCM – Edit Confirmed Selections Pop-up

Confirmed Options
✕

✓ This option has been confirmed 2 times.

| | | | | |
|-----------------|--|---|--|-----------------------|
| | | <div style="background-color: #f0f0f0; padding: 2px;"> Standard Tile QTY: 1 \$0.00 </div> <div style="padding: 2px;"> Option #: TILE00 </div> | | |
| Linked Products | | <input type="radio"/> Fibra Rectified Color Body... | <input type="radio"/> #FibraLinen12x24 (Linen) by... | Not Sent |

| | | | | |
|-----------------|--|---|---|--------------------|
| | | <div style="background-color: #f0f0f0; padding: 2px;"> Standard Tile QTY: 1 \$0.00 </div> <div style="padding: 2px;"> Option #: TILE00 </div> | | |
| Linked Products | | <input type="radio"/> BeigeSY96 | <input type="radio"/> #SY9610141P2 (Skybridge)... | Sales Notes |

Cancel
Save Changes



DCM – Confirmed Selections

< Confirmed Selections 👤 ✎ 🏠 ✉ 📄 ★

Design Checklist | Wishlist | Visualizer Scenes | Add Selections | Floor Plan | **Confirmed Selections** | History

Designer Collection: All | Category Group: Flooring | Category: All | Subcategory: All | Option Name/No.: TILE0 | Product Name/No.: Search

Clear

Options that require finalization only Standard options only Selections Total: **\$72,799.00** Expand All

⚠ You have 2 confirmed option(s) that have not been placed on the floor plan. Visit the Floor Plan tab to mark these options on the floor plan.

Flooring

| | | | | |
|--|---|---|---|-----------------------|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |  | Standard Tile <input type="text" value="Option #: TILE0"/> | Qty: 1 \$0.00 | Not Sent |
| Linked Products | <input checked="" type="radio"/> BeigeSY96 | #SY9610141P2 (Skybridge) by Daltile |  | Sales Notes |
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |  | Standard Tile <input type="text" value="Option #: TILE0"/> | Qty: 1 \$0.00 | Not Sent |



DCM: Default Sort Order

This feature will allow the DCM to apply a default sort order on options. There will be a follow up enhancement to allow this to be configured right on the Add Selections, but this feature specifically allows to update the default sort order.

Configurations:

- Set sort order by Option Name, Option Number, Price High to Low, Price Low to High.
- Ability to keep the category/sub-category grouping or remove it.
- Ability to update the sort order in the Category Group, Category, Sub-Category dropdowns to be in structure order to alphabetical order.

Settings On DCM

- Only Administrator Can Change Price
- Only Administrator Can Change Confirmed Selection Price
- Only Administrator Edits Custom Options
- Display Custom Options by Category
- Include the DCM logo on the Contract Addendum
- Use the Custom Design Center Name on the Contract Addendum
- Display Customized See Builder Label on By Buyer Reports
- Do not select product by default on Add Selections

Default Option Sort Order

- Default
- Option Name
- Option Number
- Price Low to High
- Price High to Low
- Maintain Category Groupings

Drop-down Sort Order

- Alphabetical
- Category Structure Order

Settings On EDC

- Require Registration
- Show Construction Stage
- Show Mortgage Information
- Show Presale Construction Stage
- Show Price for Browser
- Show Price for Homes without Buyers
- Show Price for Buyer
- Show Price Per Month
- Show User Information in EDC Header
- Show Wishlist Total in EDC
- Print Notes on Wishlist
- Default to Gallery View
- Display Pinterest Buttons on Option/Product Images in Presales
- Allow Home Post Sale Product Registration

Default Option Sort: Price Low to High

Design Article Sort: Name, A - Z

Save

EDC2: Suppress Closed Categories

For categories or rooms that have been closed and do not have any confirmed selections in DCM, their tiles will be hidden in EDC2.



What's next?

Visualizer Re-design

Optimization of the Visualizer page in the EDC2 for better user interaction and experience.

Game Engine

Continued work to integrate the Game Engine Technology with Envision.

Analytics 2.0

Initial development on new reporting and analytics to be able to release in Q3.

Conversion Report

| Conversion Confirmed Selections Report | | | | | |
|---|-------------|--|------------|-------------|------------|
| <input type="text" value="01 /01 /2018"/> <input type="calendar"/> <input type="text" value="12 /31 /2018"/> <input type="calendar"/> | | Community: Roma Category Group: Plumbing Update Filters_V Plan: Roma Category: Bathroom Faucets | | | |
| <input checked="" type="checkbox"/> View Products <input type="checkbox"/> View Confirmed Only | | | | | |
| Total Homes: 200 | | | | | |
| Category, Option, Product | Viewed | Conversion | Wishlisted | Conversion | Confirmed |
| Bathroom Faucets | 1349 | 25% | 343 | 58% | 200 |
| Bathroom Faucets and Hardware Level 1 | 490 | 4% | 20 | 500% | 100 |
| Brantford Brushed Nickel Plumbing Fixture and Hardware Package | 250 | 8% | 20 | 250% | 50 |
| Brantford Chrome Plumbing Fixture and Hardware Package | 100 | 0% | 0 | - | 25 |
| Eva Brushed Nickel Plumbing Fixture and Hardware Package | 50 | 0% | 0 | - | 15 |
| Eva Chrome Plumbing Fixture and Hardware Package | 90 | 0% | 0 | - | 10 |
| Bathroom Faucets and Hardware Level 2 | 146 | 30% | 44 | 91% | 40 |
| Additional Colors or Styles May be Available | 10 | 40% | 4 | 0% | 0 |
| Brantford Oil Rubbed Bronze Plumbing Fixture and Hardware Package | 60 | 50% | 30 | 100% | 30 |
| Eva Oil Rubbed Bronze Plumbing Fixture and Hardware Package | 25 | 24% | 6 | 100% | 6 |
| Kingsley Chrome Plumbing Fixtures and Hardware Package | 25 | 8% | 2 | 100% | 2 |
| Vestige Chrome Plumbing Fixture and Hardware Package | 13 | 8% | 1 | 100% | 1 |
| Voss Chrome Plumbing Fixtures and Hardware Package | 13 | 8% | 1 | 100% | 1 |
| Bathroom Faucets and Hardware Level 3 | 713 | 39% | 279 | 22% | 60 |
| Kingsley Brushed Nickel Plumbing Fixture and Hardware Package | 150 | 50% | 75 | 31% | 23 |
| Kingsley Oil Rubbed Bronze Plumbing Fixture and Hardware Package | 250 | 34% | 86 | 29% | 25 |
| Vestige Brushed Nickel Plumbing Fixture and Hardware Package | 100 | 35% | 35 | 11% | 4 |
| Vestige Oil Rubbed Bronze Plumbing Fixture and Hardware Package | 97 | 46% | 45 | 13% | 6 |
| Voss Brushed Nickel Plumbing Fixture and Hardware Package | 68 | 32% | 22 | 5% | 1 |
| Voss Oil Rubbed Bronze Plumbing Fixture and Hardware Package | 48 | 33% | 16 | 6% | 1 |