



Envision Release 4.0.3.0- Builders

NEW Approval Process Workflow option

NOTE: This feature requires configuration and will be OFF by default. Please contact your support contact to request it being turned on.

The objective of this feature is to give the builders another level of process when selecting options. The options can be selected but require approval before they are officially confirmed.

DCM: Additional Tab with submitted selections

Selection that is made will be moved to the Submitted Selections tab and will have a status of submitted. These selections cannot be Confirmed (sent back as Buyer Selections) until they have been approved. These submitted selections can be edited and deleted at will.

Options Approver Role

1. Additional Role in the Manager Users Section
2. When logging into DCM this user has the ability to confirm the submitted selections. They can do this from two places:
 - a. At the Buyer/Home level – this will confirm all submitted selections for that Buyer/Home
 - b. At the Submitted selections level – The options approved can see all the submitted selections and choose to de-select individual options if not approved.



Options Approved Role

Maintain Account

Personal Information

Account status ☒ Active ☐ Inactive

Username * Password *

First name * Confirm password *

Last name *

Email *

User Role

☒ DCM Administrator ☐ DCM User ☐ DCM Manage Selections

☐ DCM View Only ☐ DCM Manage Selections Admin ☐ DCM Customization User

☐ Visual DCM User ☐ Visual DCM Admin ☐ **DCM Options Approver**

Save

Approve at the Buyer Level

Manage Buyers

Search Buyers

Inventory Area: NHTTestDivision7 First Name: 'buyer1' Buyer Status: Active

Last Name: Email:

Search Clear

Enter "*" to match any characters (wildcard)

Inventory Area	Lot	Customer No.	Name	Selections	Status	Actions
"Renato EC": "PH 3B -55".		'buyer1'	'buyer1', 'buyer1'	1	Active	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries

First < 1 > Last



Approve at the Submitted Selections Level

Submitted Selections

'buyer1', 'buyer1' Plan: "PH 3B -55'." Current Construction Stage: 1 - Addendum
ACTIVE Home No: "HometestEC" Community: "Renato EC"

Submitted Selections Confirmed Selections History

Category Group: All Category: All Subcategory: All Option Name/No. Product Name/No. Search

Options that require finalization only Standard options only Selections Total: \$1,000.00 Expand All

Photo Not Available Oak hardwood level A Qty: 1 \$3,500.00
Option #: Oak hardwood level A + Submitted

Linked Products Acme Brick #AcmeBrick2 (White Brick) by Acme

Deselect All Print Contract Addendum Options Per Page: 20

Submit

Additional Feature Information

- The History Tab has been updated to reflect changes between Approved and Submitted
- The contract addendum allows printing of Submitted Selections ONLY (vs. Confirmed Selections)

Notable Enhancements

DCM: Coordinate Function

When using the coordinate function in the DCM, if notes are added to the original option, those notes will automatically be added to each of the selected coordinated options.

EDC2: Update of the Option Tiles

On the Option Tiles in the EDC2, the View Details button is now the more prominent button in the middle of the tile and the Wishlist button has been moved to the bottom left corner.

