

Envision Release 4.7.0.0- Builders

Drag and Drop Option Placement Feature – Additional Features

In our previous release, we launched the Drag and Drop Option Placement feature with some great initial capabilities, but we have added a few more features this release to make the tool more robust.

Read on to learn the additional capabilities and how to use them:

Make Option Placement Required

When assigning an icon to an option, there is the ability to mark that icon as required to place on the floor plan. This will update the workflow in the DCM to require that option be dragged and dropped to a location on the floor plan in order to be confirmed.

- **OM** Mark an icon as required.
- **DCM** Floor Plan tab The top category listed will be Required Floor Plan Placement Options.
- **DCM** *Add Selections tab* Still shows the option, but a floor plan icon instead of a checkbox to select. The icon links to the floor plan tab to place the option for selection.
- **DCM** *Confirm Selections* tab– Still shows the option, but a floor plan icon instead of a checkbox to edit. The icon links to the floor plan tab to place the option for selection.

OM – Edit Option

📌 Option Icon for Placement on Floor Pla	
This data is not affected by automated-feed chan	s.
Activate	\checkmark
Icon Selected *	T Letter T Black 🧷 Required

DCM – Floor Plan Tab

Parker, mic NEW Home No:	helle michelle		Comn	Plan: Plan 2 nunity: Renato Co	Current Constru		
Design Checklist	Wishlist	Visualizer Scenes	Add Selections	Floor Plan	Submitted Selections	Confirmed Selections	History
Select an icon bel to be placed. If yo	ow and drag it 1 u are placing m	to the location you wo ore than one simply o	uld like that option rag another one				
Select an icon bel to be placed. If yo onto the floor plan Option Name /	ow and drag it f u are placing m to update the o Option No.	to the location you wo ore than one simply o quantity	Id like that option rag another one Clear Search		PATIO]	
Select an icon bel to be placed. If yo onto the floor plan Option Name / Collapse All	ow and drag it f u are placing m to update the o Option No.	to the location you wo ore than one simply o quantity	uld like that option rag another one Clear Search	-	PATIO		-
Select an icon bel to be placed. If yo onto the floor plan Option Name / Collapse All	ow and drag it i u are placing m to update the o Option No. or Plan Placem	o the location you wo ore than one simply o quantity ent Options	uld like that option rag another one Clear Search 7	Г	PATIO		
Select an icon bel to be placed. If yo onto the floor plan Option Name / Collapse All Required Flo	ow and drag it i u are placing m to update the o Option No. or Plan Placem - Light 10	to the location you wo ore than one simply o quantity ent Options	uld like that option ag another one Clear Search ?	ſ	PATIO		



DCM – Add Selections Tab

▶ parker, mich NEW Home No: m	elle	Commu	Plan: Plan 2 unity: Renato C	ommunity		Current Cons	struction Stage: 1 - Ac	ldendum	
Design Checklist	Wishlist Visualizer Scenes	Add Selections	Floor Plan	Submitted Selections	Confirmed Selections	History			
Category Group	Category All	Sub	ocategory I	Option Na	me/No.	Product Name/	'No.	Clear	Search
Submitted Selections	Wishlist Selections				Standard options only	Wishlisted	only Confir	med only	Expand All
Electrical									
	i Light 10 ♀ > Option #: Light 10							Qty: 1	\$1,000.00
Linked Products	Provence twelve-light	nt chandelier		#P4129-920	C by Thomasville Lighting				

DCM- Confirmed Selection Tab

▶ parker, mic NEW Home No:	helle		Comn	Plan: Plan 2 nunity: Renato C	community			Current Co	nstruction Stage: 1 - Ad	dendum	
Design Checklist	Wishlist	Visualizer Scenes	Add Selections	Floor Plan	Submitted Se	lections	Confirmed Selections	History			
Category Group	;	Category All	\$	ubcategory All	÷	Option Na	me/No.	Product Nam	ie/No.	Clear	Search
•	i Ligi ≻ Optic	ht 10 Q on #: Light 10			Options th	nat require fi	nalization only 🔄 St	andard options	s only Selections T	otal: \$0.00 Qty:	8 \$0.00 Not Sent
Linked Products		Provence twelve-ligh	t chandelier		1	#P4129-920	by Thomasville Lighting				
🖌 Select All	Delete S	Selected Options 🥏	Resend All Optic	ons						Options Pe	er Page:
Add More Se	lections	Print Contract	t Addendum		Submit					20	\$

Edit Options from the Floor Plan tab

Along with required option placement on the floor plan tab, we have added the ability to edit that option from the floor plan tab. All the selection attribute fields available to edit, will be available in a modal on the Floor plan tab.

- Once at least one icon is placed, an arrow will appear next to the option.
- Clicking the arrow will open an Edit Option modal. (Edit Quantity, Price, Notes, etc.)

Arrow once an Option is Confirmed





Edit Option Modal

parker, michelle NEW Home No: michelle		Plan: Plan 2 Community: Renato Community	Current Construction Stage: 1 - Addendum
Design Checklist Wishlist	Edit Option		×
First Floor (H)	*	Iight 10 Q. Option #: Light 10	Qty: 8 \$0.00 Not Sent
Select an icon below and drag it to be placed. If you are placing r	Linked Products	Provence twelve-light chand #P4129-92C	by Thomasville Li
onto the floor plan to update the	Category - Type	Lights - Normal: All products linked to the option are selec	ed for the buyer.
Option Name /Option No. Collapse All	Qty - Ext. Price	Quantity 8 Ext. Price 0.00	
 Required Floor Plan Place Light 10 - Light 10 Fan 6 - Exhaust Fan 6 Flooring 	Description		
 Normal dark tile A - No Normal dark tile B - No Normal hardwood A - enables Oak hardwood 	Color Notes Style Notes	COVERED FORER	

Print Floor Plan as part of the Contract Addendum

Currently the floor plan with options placed is printable from the Floor Plan tab. You will now have the option to print the floor plan with options placement as part of the print contract addendum.

- On the Contract addendum page, there is an option for *Print Floor Plan*.
- The floor plan will print at the end of the contract addendum (before option disclosures if applicable).
- The floor plan image with options placed, the key of options/icons and the notes will all print similarly to the print from the floor plan page.

Print Addendum		
ate From	Date Until	
		E List
Display Selections:	_	
 Both 	Suppress All Option Pricing	Don't Filter By Construction Stage
Submitted ONLY	Display Only Selection Change Pricing	Construction Stage(s):
Confirmed ONLY	Total spent	♦ 1 5 9
Display Selection Changes	Print Selected Categories Only	2 6 10
Display Builder Signatures	Display Images	3 7 11
Display Buyer Signatures	✓ Include Floor Plan	4 8 12
Display Preselected Indicator	PDF Page Size: 💿 Legal 🔵 Letter	✓ Check All
Display Mortgage Information		
Display Category:Subcategory Name		
Display Option Description		



Visualizer Icon in EDC2

If you have a Visualizer enabled in the EDC2, there will be an indicator on the options and products that are available to see in the Visualizer tool. This indicator will show on wherever the option/product is being viewed from (Design Choices, Wish lists, Confirmed Selections, Product Detail Modal, etc.)



Static Header on Option Tiles

The compare feature has been moved out of the hover on the option tiles and is now a static header bar on Options that it is applicable to. This will impact all tiles which will now have a static gray header. Additionally the indicator icons (wish listed, finalized selections, visualizer) have been moved into that header to give them a clear consistent background.



Additional Updates

- Web service update to allow the activation of rooms through the web service.
- .net Framework update on all Envision applications (PM, OM, DCM, EDC, EDC2).
- Operating System upgrade for the Envision Platform.



What's next?

Manufacturer Logos displaying in EDC

Once drilled down to the lowest category level, the branding for all manufacturer products available in those options will display as a banner at the top of the page. This will give buyers that brand recognition and make them more familiar with the options they are viewing.



Designer Collections Available in DCM

This feature will make it easier for designers to select a group of options on a home. Designer collections can be visible either in the EDC2, the DCM or both.

barth, christi ACTIVE Home No: testertest				Plan: Orchid Community: Avery Ranch			Current Construction Stage: 1 - Foundation		
esign Checklist	Wishlist	Visualizer Scenes	Add	Selections	Confirmed Selections	History			
Designer Collection		Category Group		Category	Option Na	me/No.	Product Name/No.		
All	\$	All	÷	All	\$			Search	
Confirm Selections	Wishl	ist Selections			Standard options only	Wishlist	ed only Confirmed only	Clear Expand A	

Packages in Visualizer

Currently the visualizer works where only one product in one area can be updated at a time. This new feature will allow the creation of packages where the user can click on a package and see multiple products display in the visualizer together (example Kitchen Package includes Cabinets, Countertops and Backsplash).