

Envision Features in 4.19.0.0 – Builders

OM: Mass Option Assignment

Currently Envision requires that options be explicitly assigned at the lowest level of inventory which allows those options to be priced individually per plan. The use case for this change is that there are many options that a community may offer at the same price for every plan. This feature will allow the ability to assign options at the community level which will then auto-assign to all lower level inventory at that same price.

Notes

- This will NOT work from rooms/room assignments in this initial version
- This can be completed in the following ways:
 - \circ Through the feed
 - Via web-services (XML and API)
 - Manually in the UI

(**Note:** Assigning at higher org levels can take a long time and/or can time-out the system. It is recommended that the feed or web-services be used when assigning at the division level or above)

DCM: Email Send Report

This feature will include a report as well as displaying the information on the Buyer Details (see screen shot below). The new report will be available in DCM called Email Sends. The filters will be the same what is available on the buyer activity report (see screen shot below) and the report will include the following data:

- Buyer First Name
- Buyer Last Name
- Welcome Email Sent (Date/Time Stamp)
- Welcome Email Sent by (Designer user name or Web-Service user name)
- Welcome Email Sent To (Comma delimited list of recipient emails addresses)
- Post Close Email Sent (Date/Time Stamp)
- Post Close Email Sent by (Designer user name or Web-Service user name)
- Post Close Email Sent To (Comma delimited list of recipient emails addresses)

Buyer Information

Test, renat	0 p: Email api 1			Plan: Plan for API unity: Test API			Current Construction Stage: 1 - Addendum
★ Wishlist: 0 opti	tions: 0 option	ons	+ Stag + Stag	ning Deadlines je 2 - Pre-construction review je 3 - Release to construction je 4 - Site clearing je 5 - Foundation je 6 - Framing je 7 - Mechanical je 8 - Insulation Inspection je 9 - Sheetrock je 10 - Dry-wall je 11 - Trim je 12 - Closing	We Pos	Mod elcome Email stclose Email Buyer's Last I Buyer M Co E	eated: 11/26/2019 11:19 AM by StressWebService diffied: 11/26/2019 11:19 AM by StressWebService Sent: 11/26/2019 11:19:25 AM by StressWebService Sent: No Login: This buyer has not logged in yet. (0 total logins) Name: renato test Buyer: renato cobuyer mber: 8008008000
Design Checklist	Wishlist	Visualizer Scenes	Add Selections	Submitted Selections	Confirmed Selections	History	



Email Sends Report

elcome: Envision Design Center Manager - Internet Explorer								-3
tp://dcm-test.envisionoptions.com/reports/report_viewer.aspx?	?oid=84&rdReport=DCM.EmailSe	nds&OrgID=84&StID=2&BSN=4	ctive&HSN=All%20Active&rdShowV	/ait=True&rdShowModes=NonPrint&S	T=true&HST=true&DT=true&OrgName=NHT	testCorp&SelOrg=NHTte	stDivision2	
14 4 1 of 1 ▷ ▷1 ¢ 100% ✓	Find Next 🔒	• 💿 🖨						
Email Sends Report								Report generated: 12/5/2019 10:35 AM
NHTtestCorp	ALL STREET, ALL ST						n-estress n	
NHTtestDivision2								
Buyer Status: Active								
Home Status: All Active								
User Name	Date Created	First Name		Last Name	Lot Number	Buyer Status	Home Number	Home Status
Email Sent by			Date Sent	Email Sent To				
EDC Visualizer								
NewBuyerAn	12/4/2019	NewBuyer		NewBuyer		Active	1097	Active: InDesign
Welcome Message								
Andrea	Portillo		12/4/2019 5:24 PM	aportillo@builderhomesite.com,apor	tillo@builderhomesite.com			
			Note: The data in this report is generated	from the Envision Data Warehouse and is re	efreshed nightly.			
								Page 1 of

Report Filters

💼 Set Buyer Activity C	riteria	
Buyer Name		
Buyer Status	Active	*
Home Status	All Active	÷
Date Created		

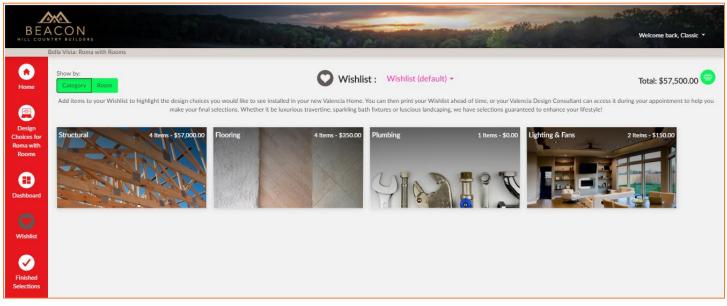
Platform Updates

- OM/PM: error clicking on PM from OM when "Remember this search" is activated on Manage Options Page
- OM: Gallery 1 and Gallery 2 UI Can only edit (rearrage/add captions to) 10 images per gallery
- Visualizer re-design bug fixes
- Platform Bug fixes

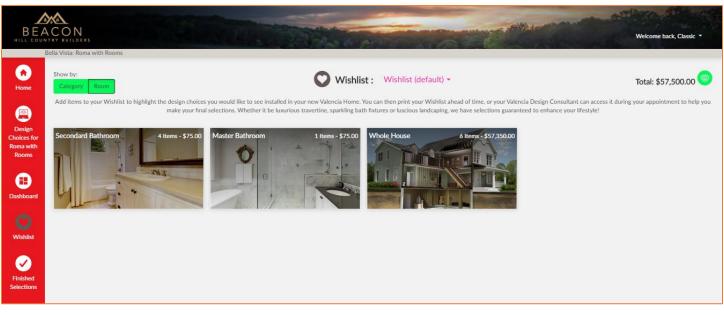


EDC Rooms-ReDesign

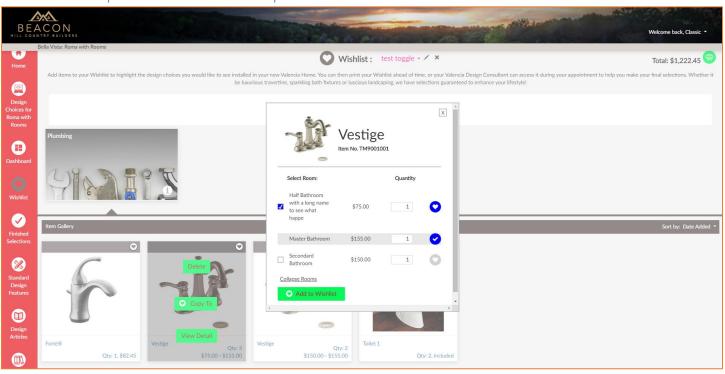
Category View



Room View



BDX View Rooms the Option is available in on the Option Tile



View Rooms the Option is available in on the Product Description Page

HILL COURTAY BUILDERS	Manager and a state	Welcome bad	Sic -
Prine Image: Strain	Vestige Item No. TM9001001 Dygrade Price: \$75.00 Vestige, Oil rubbed bronze two-handle high arc bathroom faucet Product No. 63010RB By Moen Style/Color: Oil Rubbed Bronze •		.5 G
Wishlist	Select Room:	Quantity	
Finished Selection	Room Name 2	\$12,000.00 30	Added
Standard Design	Room Name 4	\$3,000.00 150 \$15,000.00 10 \$1,000.00 105 \$1,000.00 105 \$1,000 005 \$1,000 005 005 005 005 005 005 005 005 005	
Design Articles	Collapse Rooms Add to Wishlist		