



# 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:
  - 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, renato

ACTIVE Home No: Email api 1

Plan: Plan for API  
Community: Test API

Current Construction Stage: 1 - Addendum

★ Wishlist: 0 options

🔑 Confirmed Selections: 0 options

💰 Amount Spent: \$0.00

Upcoming Deadlines

→ Stage 2 - Pre-construction review

→ Stage 3 - Release to construction

→ Stage 4 - Site clearing

→ Stage 5 - Foundation

→ Stage 6 - Framing

→ Stage 7 - Mechanical

→ Stage 8 - Insulation Inspection

→ Stage 9 - Sheetrock

→ Stage 10 - Dry-wall

→ Stage 11 - Trim

→ Stage 12 - Closing

Created: 11/26/2019 11:19 AM by StressWebService

Modified: 11/26/2019 11:19 AM by StressWebService

Welcome Email Sent: 11/26/2019 11:19:25 AM by StressWebService

Postclose Email Sent: No

Buyer's Last Login: This buyer has not logged in yet. ( 0 total logins)

Buyer Name: renato test

Co Buyer: renato cobuyer

Phone Number: 8008008000

Design Checklist

Wishlist

Visualizer Scenes

Add Selections

Submitted Selections

Confirmed Selections

History



## Email Sends Report

Welcome: Envision Design Center Manager - Internet Explorer  
http://dcm-test-envisionoptions.com/reports/report\_viewer.aspx?oid=84&rdReport=DCM.EmailSends&OrgID=84&SID=2&BSN=Active&HSN=All%20Active&rdShowWait=True&rdShowModes=NonPrint&ST=true&HST=true&DT=true&OrgName=NHTTestCorp&SelOrg=NHTTestDivision2

14 of 1 100% Find | Next

Email Sends Report Report generated: 12/5/2019 10:35 AM

NHTTestCorp  
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	1087	Active: InDesign
Welcome Message							
Andrea	Portfolio		12/4/2019 5:24 PM	aportillo@bualderhomete.com,aportillo@bualderhomete.com			

Note: The data in this report is generated from the Envision Data Warehouse and is refreshed nightly.

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## Report Filters

Set Buyer Activity Criteria

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 (rearrange/add captions to) 10 images per gallery
- Visualizer re-design bug fixes
- Platform Bug fixes



# What's next?

## EDC Rooms-ReDesign

### Category View

BEACON  
HILL COUNTRY BUILDERS

Welcome back, Classic ▾

Bella Vista: Roma with Rooms

Home

Design Choices for Roma with Rooms

Dashboard

Wishlist

Finished Selections

Show by:

CategoryRoom

Wishlist : Wishlist (default) ▾

Total: \$57,500.00

Add items to your Wishlist to highlight the design choices you would like to see installed in your new Valencia Home. You can then print your Wishlist ahead of time, or your Valencia Design Consultant can access it during your appointment to help you make your final selections. Whether it be luxurious travertine, sparkling bath fixtures or luscious landscaping, we have selections guaranteed to enhance your lifestyle!

Structural4 Items - \$57,000.00

Flooring4 Items - \$350.00

Plumbing1 Items - \$0.00

Lighting & Fans2 Items - \$150.00

### Room View

BEACON  
HILL COUNTRY BUILDERS

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Secondard Bathroom4 Items - \$75.00

Master Bathroom1 Items - \$75.00

Whole House6 Items - \$57,350.00

