BUILD YOUR HOME

- quick guide -

builderUX

TABLE CONTENTS

| Customer Goes to Contract in Sales Simplicity | → | Slaes Simplicity Calls BuilderUX Webservie passing it Client informatoin | → | Customer Logs into Customer Portal And Selects their options | → | Coordinator Logs in and Reviews Option Selections | → | Coordinator Finalyzes Option Seletions |

Customer changes their mind on Selections

Do we need to send Ehome anything?

Figure 1.0 Main Diagram

BuilderUX Sends Sales Simplicity Finalyzed Option Selection
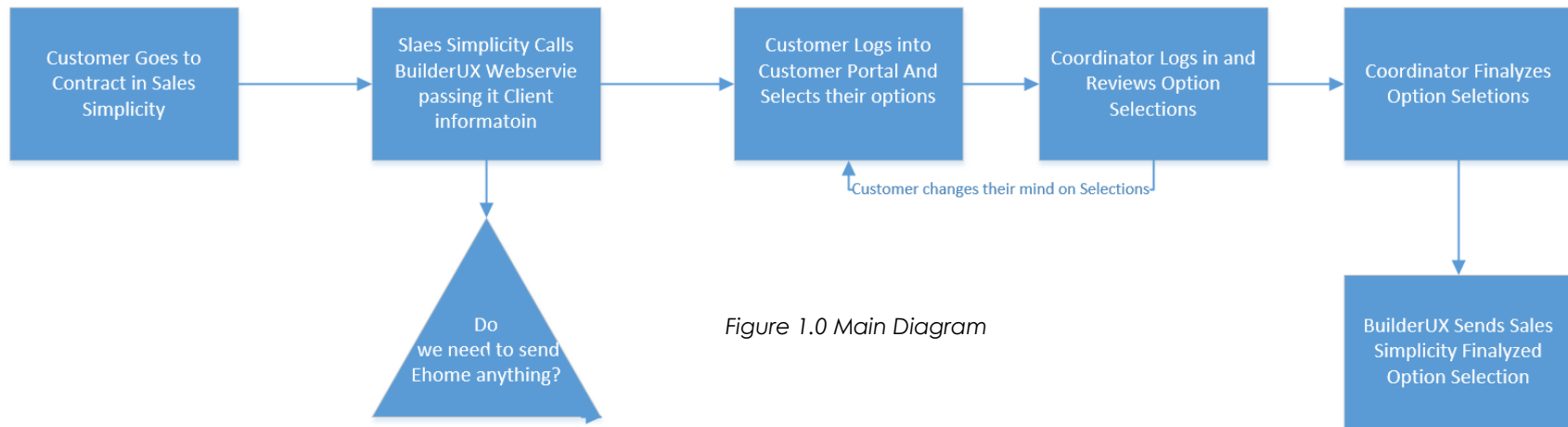
Installation

The ***builderUX*** Plugin is installed like any other plugin. You go to plugins->Add New and upload the zip file. Once the plugin is installed you will see a new Menu called BuilderUX.

Now you have start configuring all your settings. *See Figure 1.1 next page*
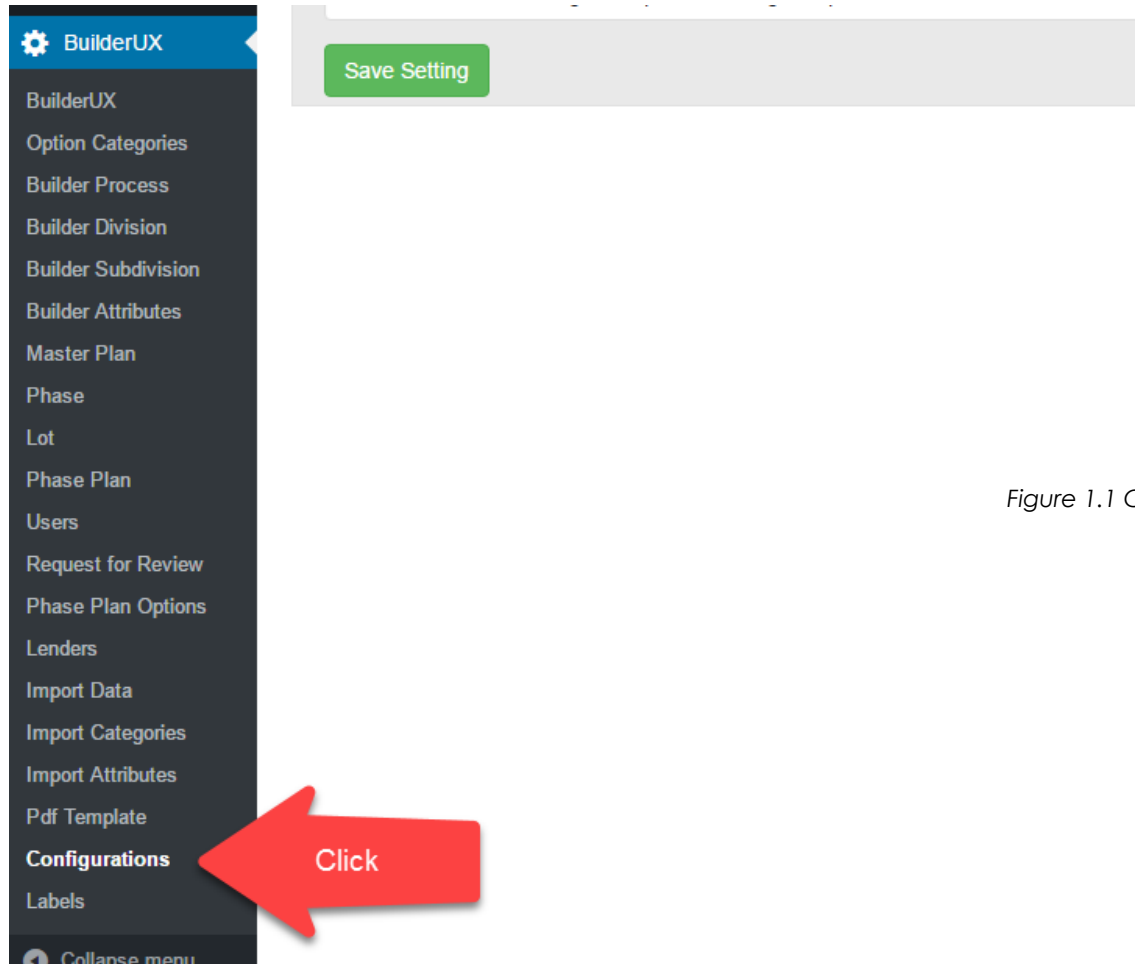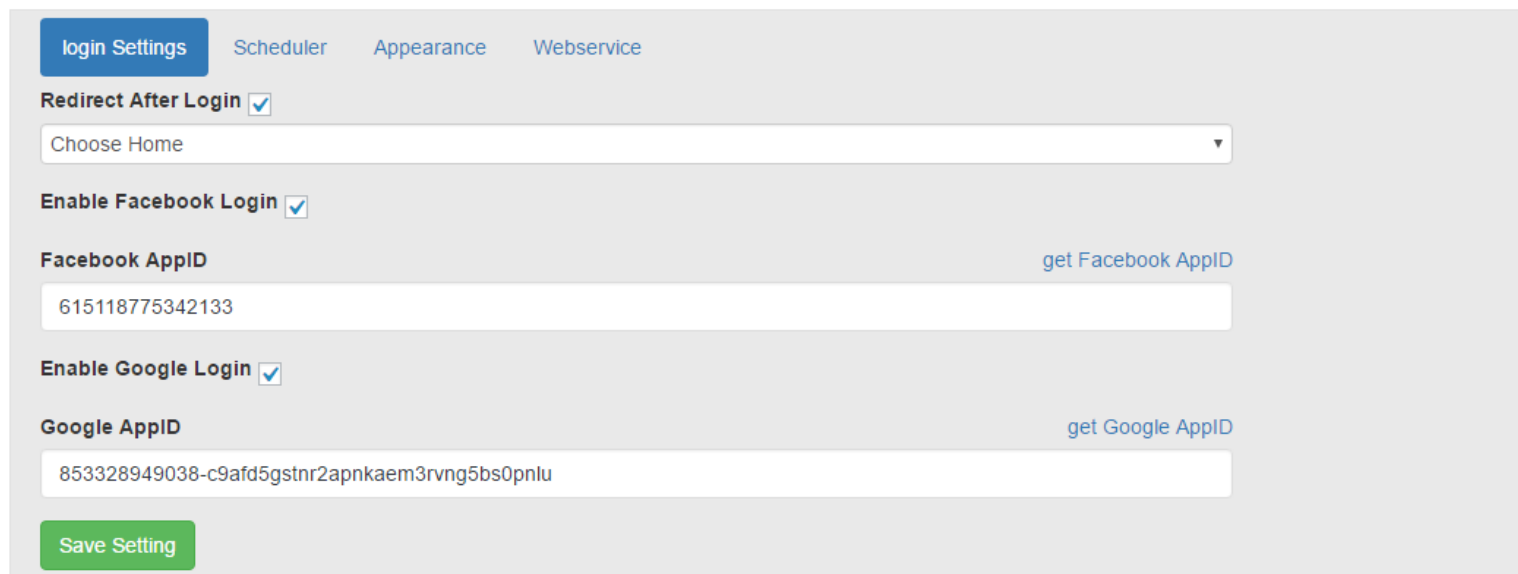
Configuration

BuilderUX	
⚙ BuilderUX	**◀**
BuilderUX	
Option Categories	
Builder Process	
Builder Division	
Builder Subdivision	
Builder Attributes	
Master Plan	
Phase	
Lot	
Phase Plan	
Users	
Request for Review	
Phase Plan Options	
Lenders	
Import Data	
Import Categories	
Import Attributes	
Pdf Template	
Configurations	Click
Labels	
◀ Collapse menu	

Save Setting

Figure 1.1 Configuration Settings

Redirect after Login

This is to set the page you redirect to after your users logs in if they have an account. This dropdown displays a list of your pages and you want to choose the one that represents the choose your home page.

BuilderUx Setting

login Settings	Scheduler	Appearance	Webservice

Redirect After Login ☑

Choose Home ▼

Enable Facebook Login ☑

Facebook AppID   get Facebook AppID

615118775342133

Enable Google Login ☑

Google AppID   get Google AppID

853328949038-c9afd5gstnr2apnkaem3rvng5bs0pnlu

Save Setting
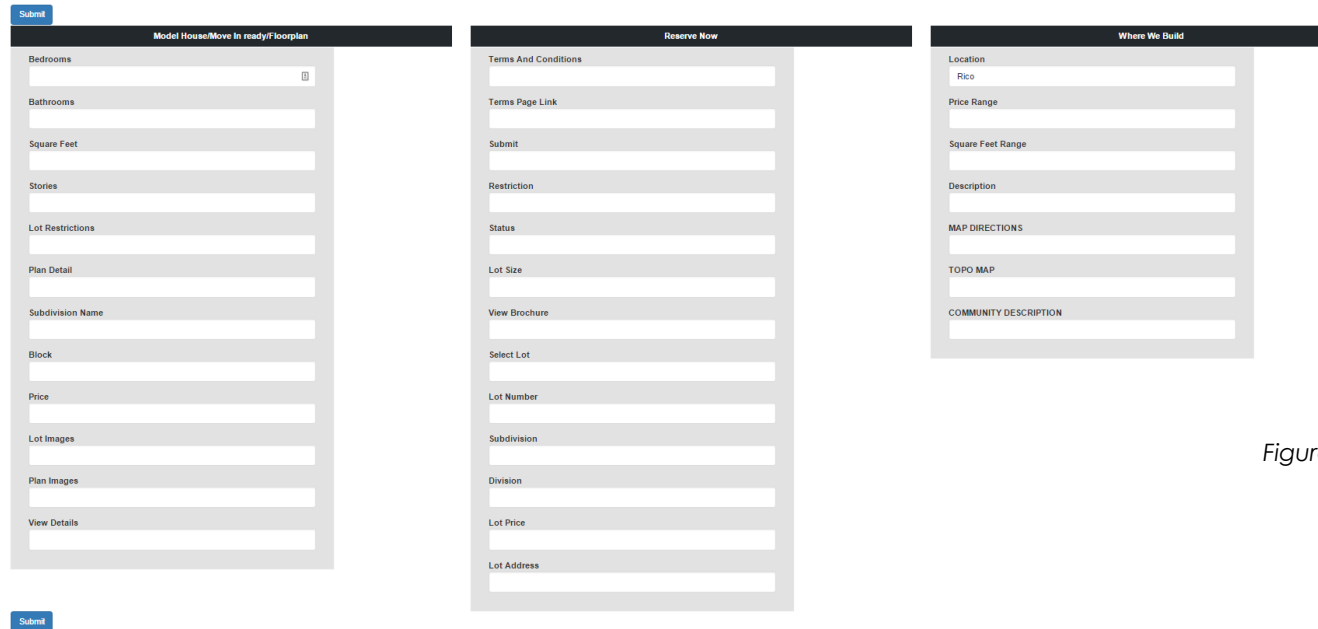
Figure 1.2 Input fields for logins

Facebook AppID

Google AppID

Renaming Fields

The ability to rename labels and textboxes on your website is crucial. So we have embedded this into our plugin as well so that you can do this very easily.

Figure 1.3 Renaming Fields

If you want to change the display name of a field in ***builderUX*** please just update it here and it will change on screen for your users.

Figure 1.4 More Options for Renaming

First Web Dump From Sales Simplicity

When we set up **builderUX** we will set up a nightly cron to import your data. You will only need to do this in 1 off situations where you need to upload some changes mid day.
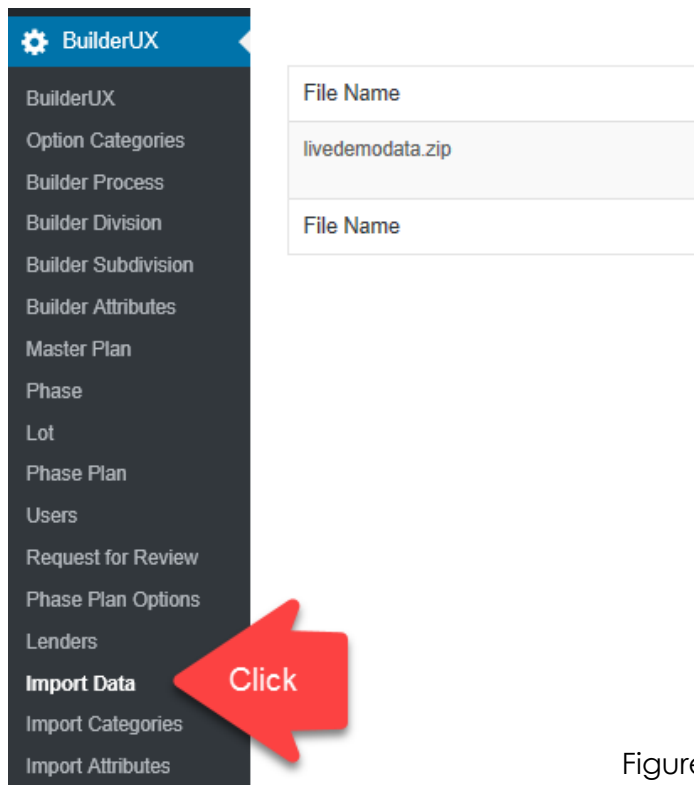
Figure 1.5 Import Data

Figure 1.5

Figure 1.6 Input Field for Upload

Figure 1.7 Upload Button

Figure 1.8 Action Buttons

Figure 1.9 Import Files

Or you can simply import file by file if you want to pick and choose what data comes in.

Excel Import

Attributes
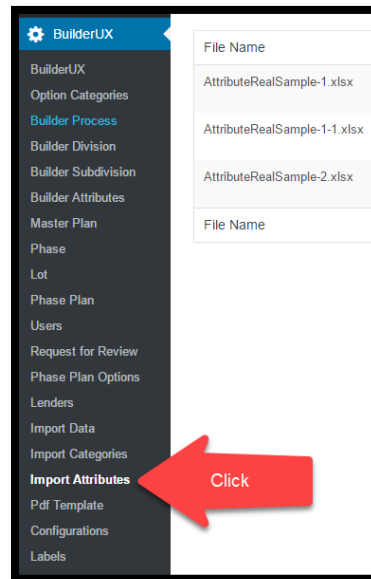
Figure 1.10 Import Attributes Options

Figure 1.11 Edit The Excel FIle information to match what you want to upload

Figure 1.12 Attributes

Division Num : This is the Division Number in Sales Simplicity.

Subdivision Num : This is the Subdivision Number in Sales Simplicity.

Option Category Name: This is the category that the attribute and its image will display for.

Option Subcategory Name : This is the sub category that the attribute and its image will display for.

Question : This is the question that will show up for the attribute.

Answer : This is the answer that will show up for this image.

Use Text : Defines whether this is a text attribute. If it is the Answer portion is irrelevant.

Price Change : This is how much more the option will cost you because you selected this attributes.

Attribute Image : This is the image that will show for this attribute.

Figure 1.13 Uploading File

Figure 1.14 Action Button For Options

Categories

Figure 1.15 Downloading Sample

Figure 1.16 Files

Division Code : The Division that will get the New Category or Subcategory

OptionGroupName : The category name you are either adding or adding a subcategory to.

Subcategory Name : The Subcategory your are either adding or updating.

Seq : The order that this subcategory should show up under the category.

Active : Whether or not this subcategory is active or inactive. Active = 1 Inactive = 0.

Figure 1.17 Choosing File to Upload

Figure 1.18 Action Buttons for builderUX Categories

Style
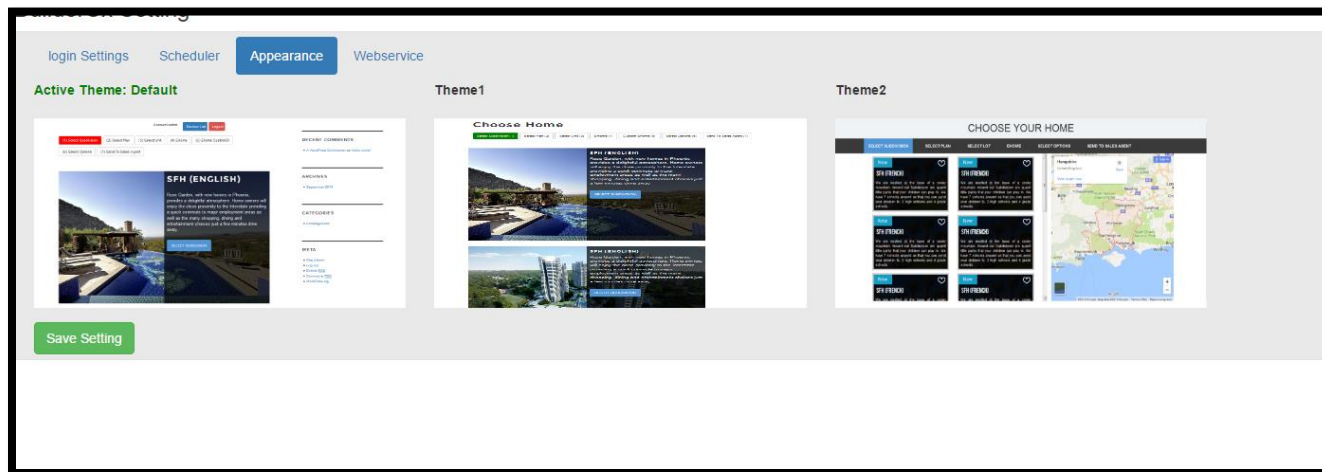
Themes

Theme 1
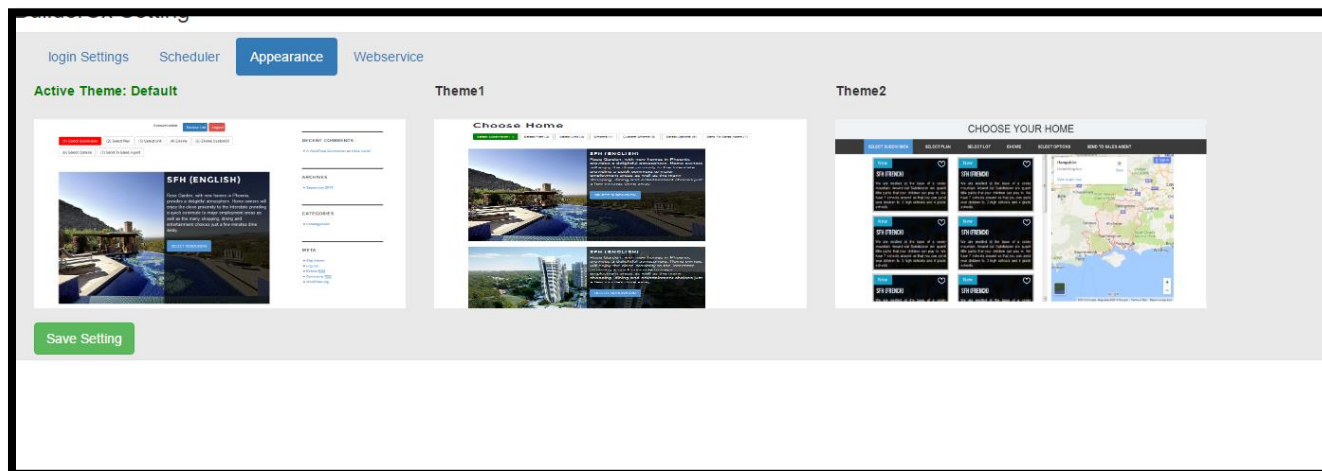
Figure 1.20 Selecting Themes
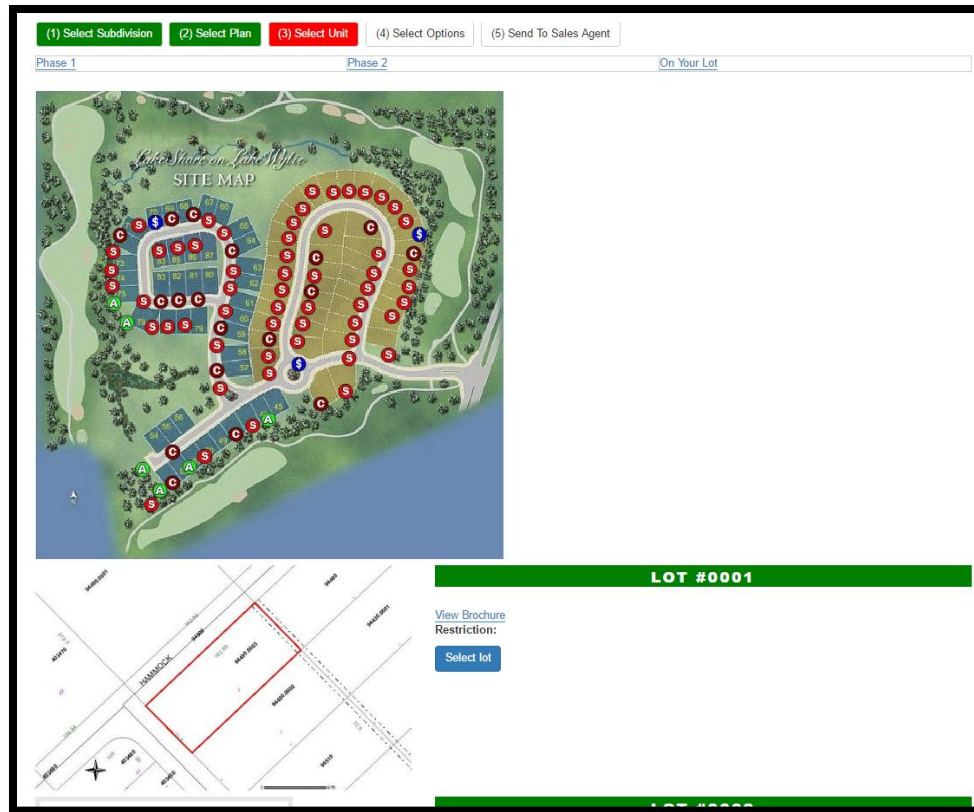
Figure 1.21 Theme Interfaces

Figure 1. 22 Selecting Options

Theme2
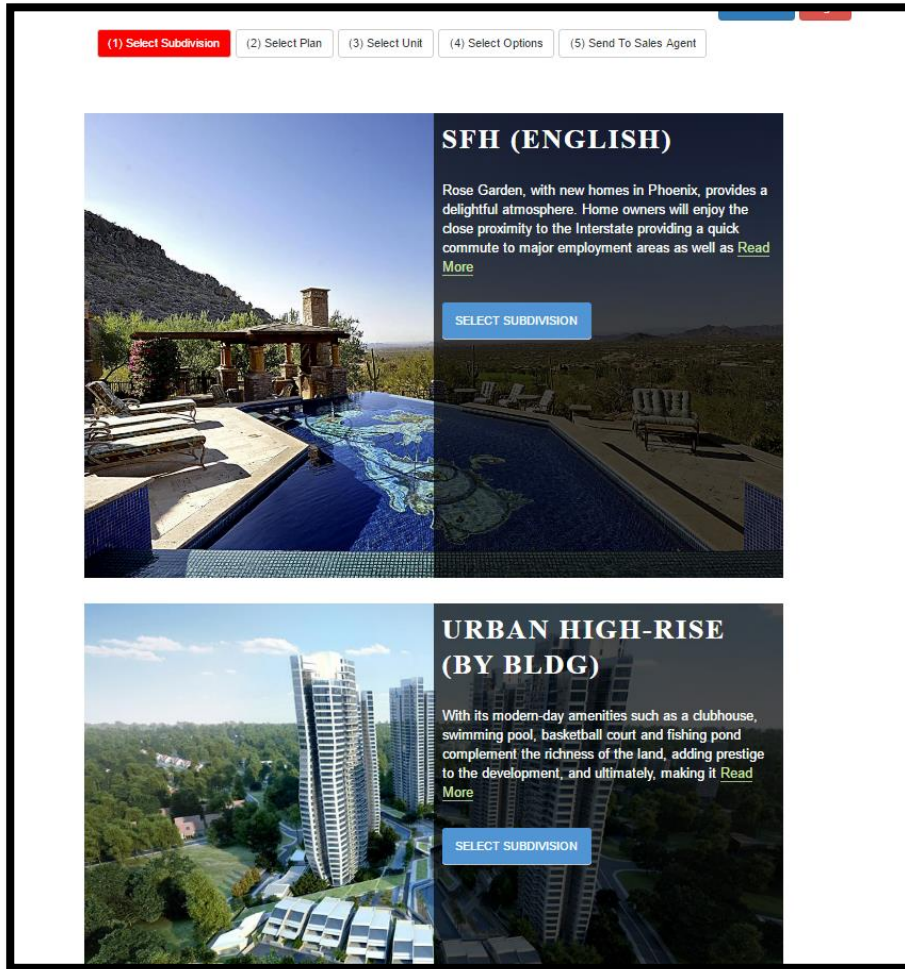
Figure 1. 23 Selecting Subdivisions
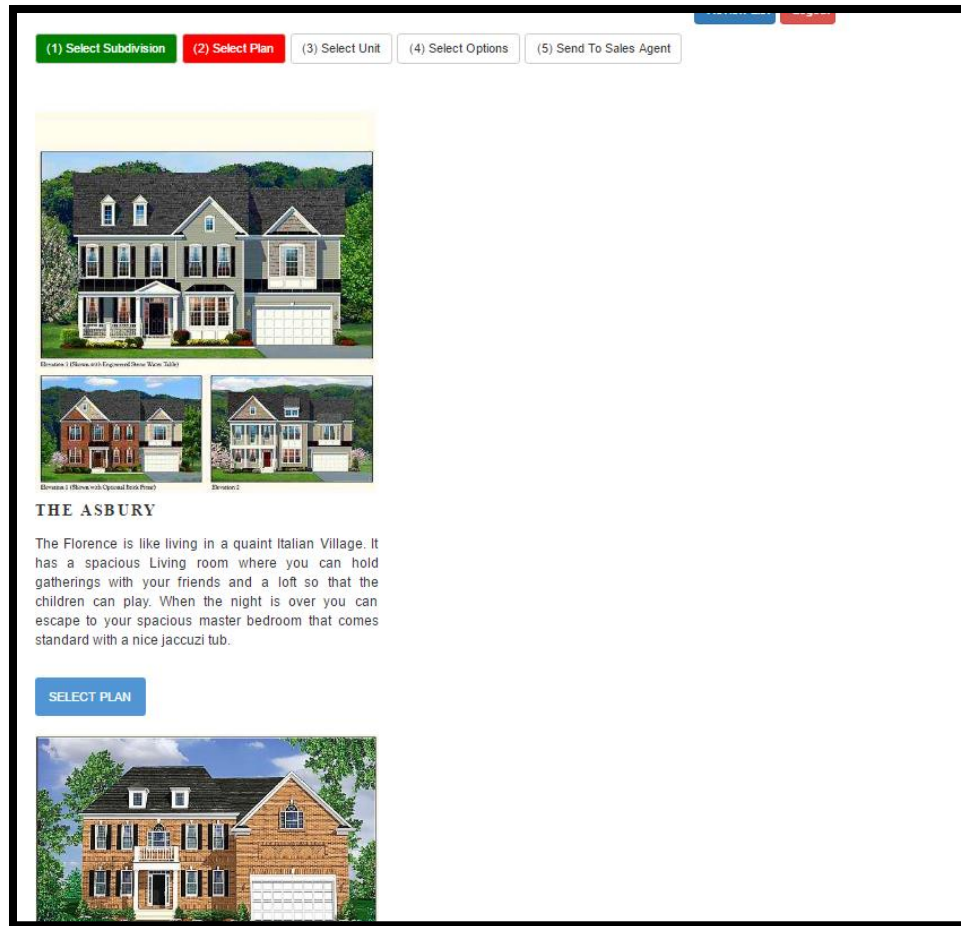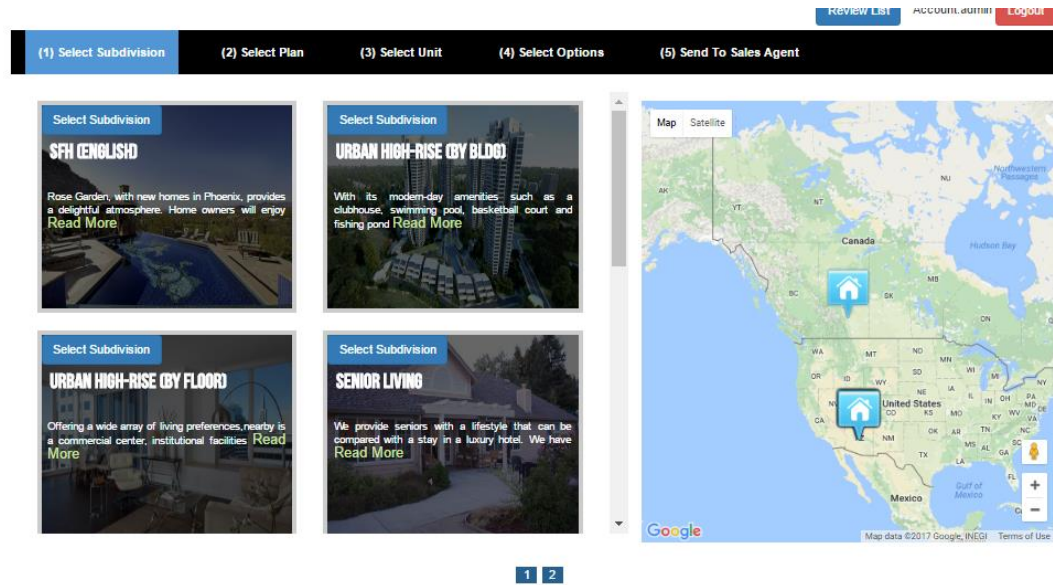
Figure 1. 24 Selecting Plans

Figure 1. 25 Submit for Review

Theme3

Figure 1.26 Theme 3 Select Subdivisions
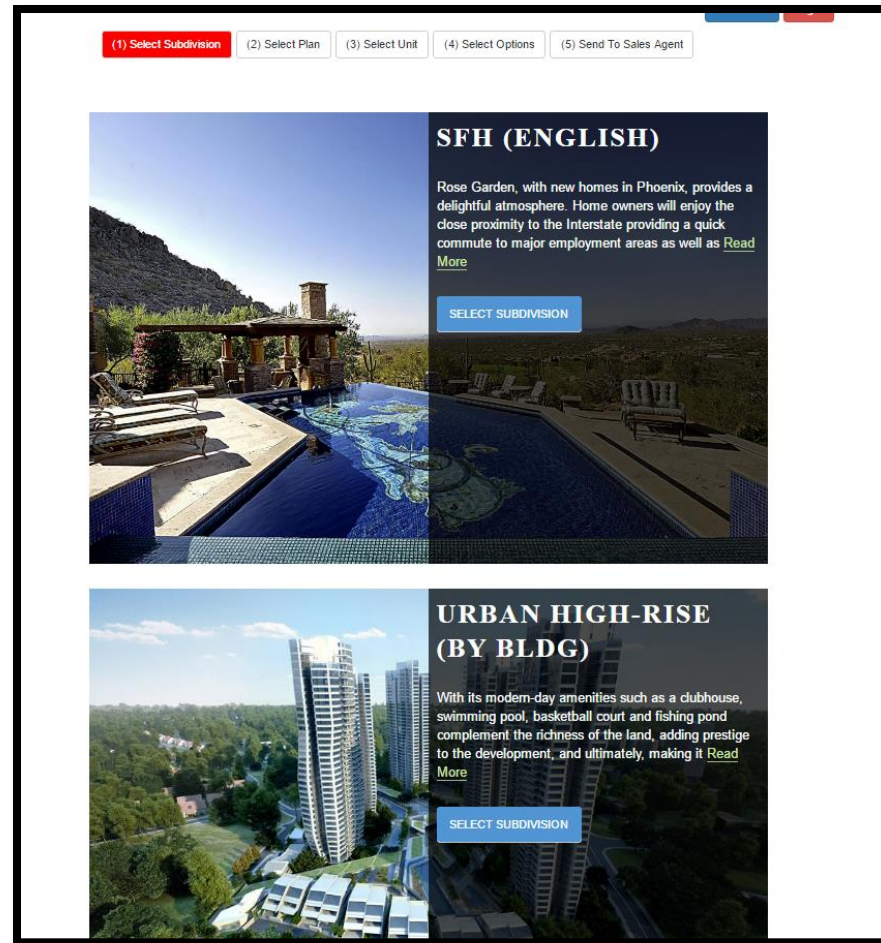
Figure 1. 27 Select Subdiviion from Themes
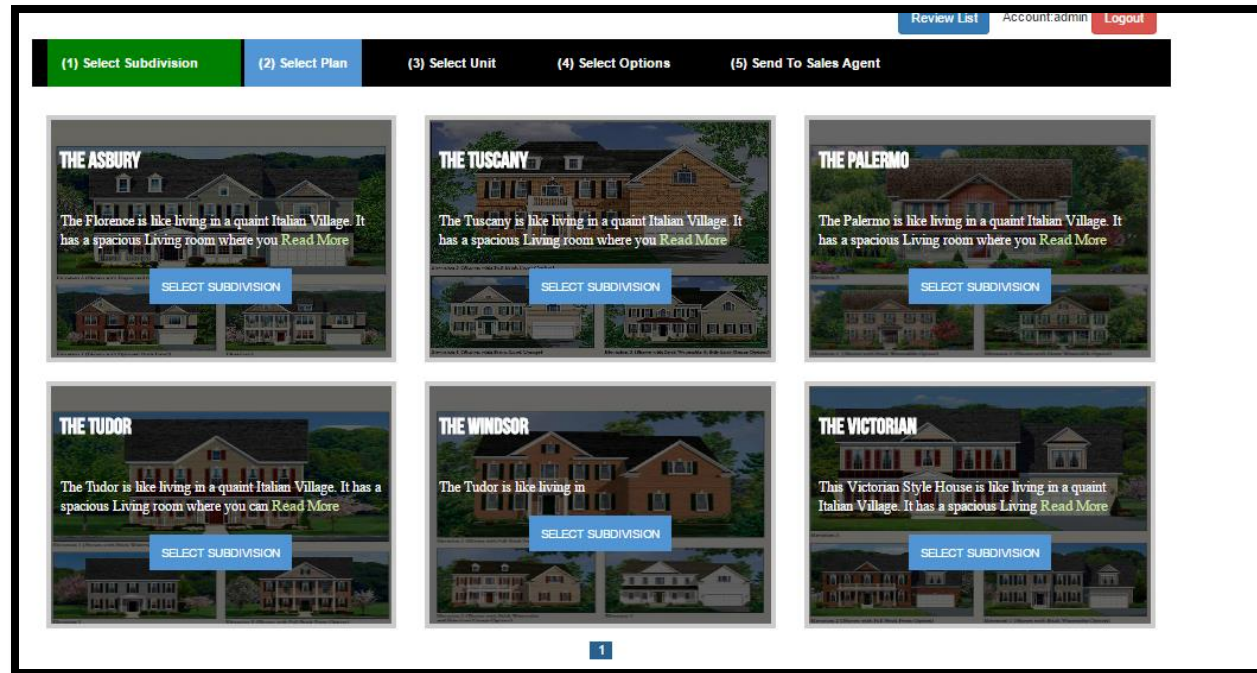
Figure 1. 28 Select Subdivision

Figure 1. 29 More Options for Products

Editing the PDF Template to suit your needs

The Option Addendum is something that is entered in HTML format and when the user finally gets it, it is converted to a PDF so that it is more Web compliant.

During this process you will use this HTML editor to build your actual change order. You will use our simple merge fields to merge in the information and selections that you want in your document that BuilderUX has access to.
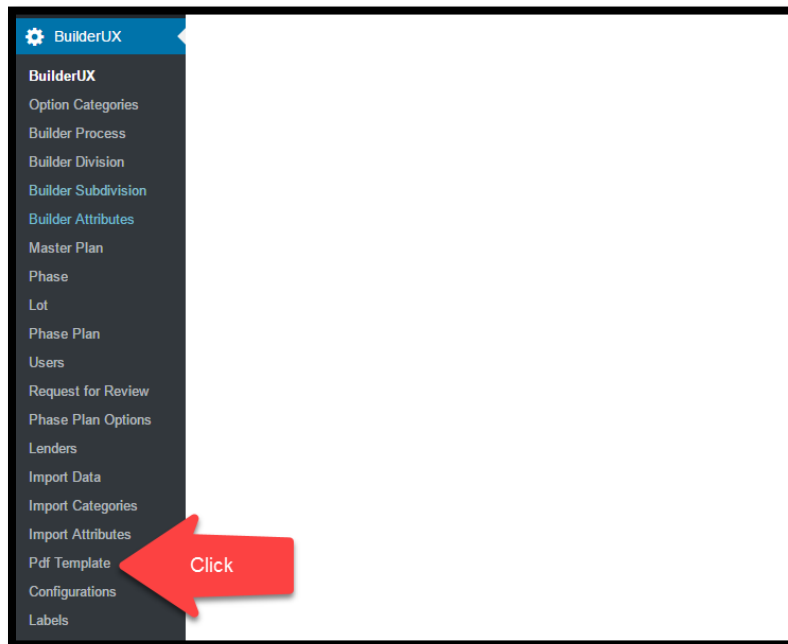

Figure 1. 30 Selecting PDF Templates

Figure 1. 31 PDF Template Setting

{{info_email}}

{{info_fax}}

{{info_name}}

{{info_logo}}

{{info_description}}

{{plan_name}}

{{plan_baseprice}}

{{plan_price}}

{{plan_images}}

{{selected_options}}

{{lot_premium}}

{{options_total}}

{{elevation_title}}

{{elevation_price}}

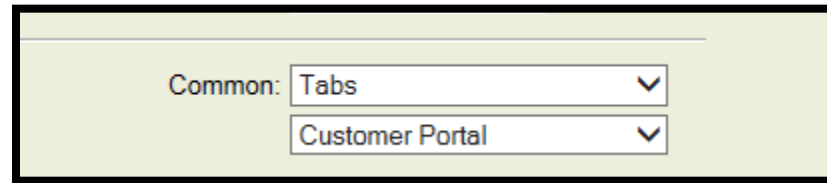{{general_total}}

Setting up customer portal to embed builderUX
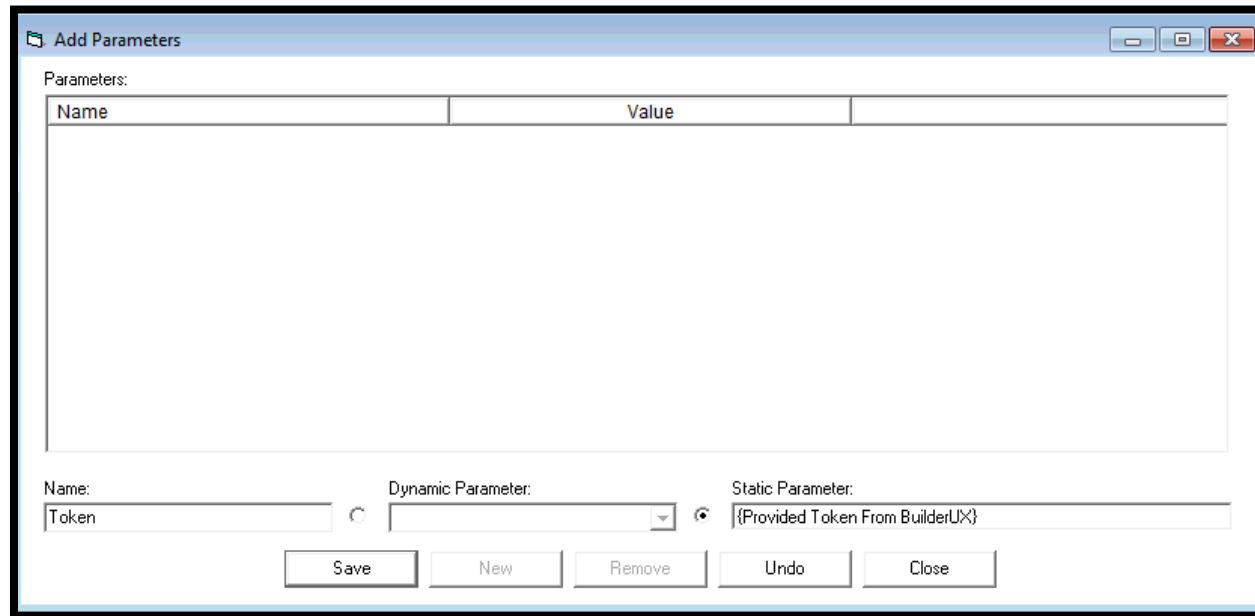

Figure 1. 32 Common Dropdown List Options

Figure 1. 33 URL(Uniform Resource Location)

You will be adding a token that we will provide you:

Figure 1. 34 Adding Parameters

And then you must add a field called **CommunicationID** and fill that in with the Scenario Specific ID out of Sales Simplicity.
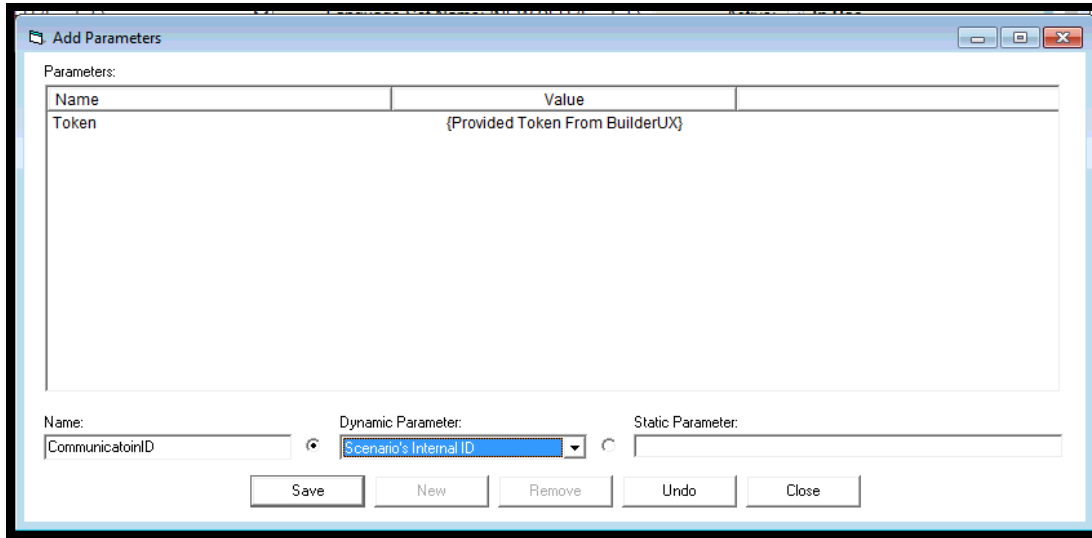
Figure 1. 35 Setting Up Dyanmic Parameter

Once you do this then builderUX will show up in your Customer portal and your users can select options from home logging into sales simplicity's cu.

Figure 1. 36 Adding More Interior Options