

Design Suite

The Design Suite and Bid Suite are similar, but not exactly the same.

House Details

On page load, the House Details are filled with their initial content of the User's previously worked on address's information. Each does a **Search for House Details** based on the address of the House Dropdown value which is in the House Selections section of the page. The User does not edit the house details here - it is for inputting house details for a new address only. The inputs are disabled until the House icon is clicked.

The Inventory Control toggle shows the Overage in House Selections.

Note: "Overage" is the same as "Waste" in the Bid Suite.

The Design Center toggle hides the Takeoff, UOM, and Internal Notes in House Selections.

The Admin Mode toggle is only shown for Users with the *master-admin* role, and if selected all non-archived houses are available in the House Dropdown, not just the ones the User has created.

Creating a New House

The House Icon brings the user to "Creating a New House Mode" to allow the User to fill in all fields for a new address.

The Labor Pricing Dropdown has three options: Semi-Custom, Custom, and Mountain. If Semi-Custom is chosen, Production Labor is "yes". If Custom is chosen, nothing is set to "yes". If Mountain is chosen, Mountain is "yes". These three options play a big role in determining the cost of selections.

Note: "Semi-Custom" is the same as "Production" in the Bid Suite. The two have different labels for the customers.

Upload Template

Once all inputs are filled in, the User clicks the Upload Template Button.

Here, the User must follow the 5 steps described on the Upload Template Popup. The "0/2 Tasks Completed" refers to the two main tasks: clicking the Upload Now button and the Finish Uploading button.

First, the User must make sure all House Details fields are inputted correctly.

Then, the User must either upload a file or select a pre-uploaded template.

Next, the User must map the fields in the correct dropdowns so that the upload is done correctly.

Now, the User clicks the "Upload Now" button. If there is no error, once this is complete, the Tasks Completed now says "1/2 Tasks Completed".

Here, if the Address, Builder, Pricing, Plan #, or Designer fields are empty, the Address is a duplicate, or the User clicked the button twice, an error pops up and the workflow is terminated.

All that is left is for the User to click the Finish Uploading button. Once that has loaded, the Tasks Completed now says "2/2 Tasks Completed" and the popup closes.

House Selections

This repeating group does a **Search for Selections** sorted by Area:

Any field contains Input Search Filter's value

Address = Dropdown Houses's value

Option = STANDARD

The group (without any "modes" such as Design Center or Inventory Control) shows the Area, Type, Vendor, Material, Color, Takeoff, Cost, Notes, Internal Notes, Underlay/Edge, Grout, Install Detail, and UOM.

For regular Users not in Admin Mode, the only options in the House Dropdown are the non-archived addresses they have created. The User selects an address in the House Dropdown, and can search any field, view history, view trash, bulk change material, archive house, delete house, or filter the selections by special view.

Under the repeating group is the entire house's Total Cost.

Note: "Cost" is the same as "Price" in the Bid Suite.

Search Any Field

The Search Any Field input is a way to filter selections in the Main Repeating Group. Users can search without needing an entire word (i.e. can search powder just by typing pow) since the Main Repeating Group is doing a **Search for Selections** that is sorted by Area and filtered **Advanced**:

This Selection's Area:lowercase contains Input Search Filter's value *or* This Selection's Type:lowercase contains ... etc.

It lists the above condition for each section of the Main Repeating Group, as there is not an "any field contains" option *if the User does not type the entire word*.

View History

When the User clicks the View History button, it shows the Popup EDITED, where the repeating group can be filtered by area and type, and searched by any field. The repeating group does a **Search for Selections** sorted by Area and filtered:

Address = Dropdown Houses's value
Any field contains Input Search Filter - edited popup's value
Type = Dropdown Type for EDITED's value
Area = Dropdown AREA for EDITED's value

The dropdowns only allow selections with the Option = EDITED. An option becomes EDITED any time the pencil icon is clicked and the changes are saved on the main House Selections page.

The User can bring back the selection by clicking the undo icon, which changes the option back to STANDARD.

View Trash

When the User clicks the View Trash button, it shows the Popup trash, where the repeating group can be filtered by area and type, and searched by any field. The repeating group does a **Search for Selections** sorted by Area and filtered:

Address = Dropdown Houses's value
Any field contains Input Search Filter - edited popup's value

Type = Dropdown Type for TRASH's value

Area = Dropdown AREA for TRASH's value

The dropdowns only allow selections with the Option = DELETED. An option becomes DELETED any time the trash icon is clicked and the changes are saved on the main House Selections page.

The User can bring back the selection by clicking the undo icon, which changes the option back to STANDARD.

Bulk Change Material

When the User clicks the Bulk Change Material button, it shows the Popup Swap bulk materials. Here, the User selects a type in the dropdown and can either change the type entirely (or leave that dropdown blank), change the color for every instance of that type, or change the material for every instance of that type.

If the User has filtered the Main Repeating Group in any way (by typing in the "search any field" input) then *only those selections will be changed*. For example, if the User only wants to change all countertops in Bath 1, that is an option.

When the User clicks save:

The selections are copied and all saved as Option = EDITED.

The original selections are changed based on the new material added.

The cost is updated based on the labor that's been selected, the new material, and the user's margin.

Archive House

When the User clicks the Archive House button, there is a **Search for House Details** that looks for the address and changes:

Archived = "yes"

Date Archived On = Current date/time

Once a house is archived, it is no longer available for any User in the Houses dropdown. If archiving was a mistake, the User can go to My Houses, search the address, edit the house, and unclick the archived checkbox.

Delete House

When the User clicks the Delete House button, it shows the Popup Delete as a failsafe in case clicking that button was an accident. Once the house is deleted, all data for it is lost. If the User clicks Yes to delete, there is a **Search for Selections** for that address and a **Search for House Details** for that address that are both deleted.

Special View

This dropdown can filter the Main Repeating Group by selections if they are "confirmed" or not. The total price under the Main Repeating Group also changes, so the only information shown is for the selections the dropdown has filtered down to. If the User Bulk Changes a Material, they would only change the selections shown with the special view.

Each confirmed selection has a green check mark on the left side.

The user can "confirm" a selection if they click the "confirm" checkbox in the Popup Selection.

Edit Icon

If the User clicks the edit icon on an individual selection, the Popup Selection is shown. Here, the User can edit any aspects of the selection needed. If the inputs are left blank, there will be no change.

Once the User clicks Save:

- The User's margin and mark is updated.

- If the Type is TILE but the dropdown for FLOOR/WALL is empty, there will be an error shown and the workflow terminates.

- The selection is duplicated and saved with the option EDITED.

- The selection's information is updated based on the inputs and if the **Search for House Details** Production Labor and Mountain are yes/no (since that affects labor prices).

- The margin and mark for the house are changed based on the updated information.

Trash Icon

If the User clicks the trash icon on an individual selection, the Floating Group A is shown to tell the User the app is loading, and the selection's option is changed to DELETED.

Add a Selection

The User can input any information in the Add a Selection section for a new selection to be added to the house with the address in the Houses Dropdown. Once everything the User needs to be filled is inputted, they can click the Add to House Selections Button and then:

If there is no address, the workflow terminates.

The User's margin and mark is updated.

If the Type is TILE but the dropdown for FLOOR/WALL is empty, there will be an error shown and the workflow terminates.

The new House Details are created based on the inputs.

A new Selection is created based on the inputs and if the **Search for House Details** Production Labor and Mountain are yes/no (since that affects labor prices).

The margin and mark for the house are changed based on the updated information.

Builder Options

The dropdown does **Search for Selections** for all options that are not custom options and where the item's option is not STANDARD or EDITED.

The repeating group does a **Search for Selections** sorted by Option and filtered:

Any field contains Input Search Filter's value

Address = Dropdown Houses's value

Option = Dropdown Option's value

Custom Option <> yes (does not equal yes)

The User can add the option by clicking the plus icon. When that happens:

The old STANDARD option now is "Previous standard(s)" with notes that say "Previous standard. Your option replaced this."

The option the User wants to add becomes STANDARD with notes that say "option added".

The costs are changed based on the new selection.

The User can delete an option by clicking the minus icon that appears in the House Selections section. When that happens:

The option is changed.

The costs are changed based on the selection being erased.

Custom Options

All the same as the Builder Options, except it is filtered by when Custom Option = yes.

Download Options

Each download link at the bottom will create and download a CSV file based on the House's information.

Color Sheet

The Color Sheet and Bid Sheet are similar, but not exactly the same.

The top section allows the User to lookup an address to get all of its information. Shown below the search bar is the Designer assigned to the job. In the middle of the page is the information from when the Designer first created the address in the Design Suite page:

Buyer Info: Homeowner, Email, Phone

Builder Info: Builder, Subdivision, Plan #

CFC Info: Designer, CFC Map Area, Job #

Dates: Original Selection Date, Revised Selection Dates

Note: "Designer" is the same as "Creator" in the Bid Suite.

The User can add a revision date in the input area under Revised Selection Dates. Once they click the save icon, the date is stored in the list Date Revisions and shown above the input field.

The buttons on the right allow the User to export the whole color sheet, except for all elements with the ID IGNORE (like the icons) as a PDF, export the selections, or add files/images to the bottom of the page.

Designer Mode shows the Takeoff and UOM.

Type ONLY hides the Repeating Groups and headers that are based on the area, and show new groups all with the types as their headers.

Allowance shows a section at the bottom where an allowance can be added that will be subtracted from the grand total.

Hide Price hides everywhere that the cost is shown.

View Margin shows the margin numbers right underneath the toggle.

The Grand Total shows the total cost for the entire Color Sheet.

Type Dropdown

This dropdown will filter every selection to only show those with the type chosen. Some of the lines are multiple options (i.e. CARPET PAD) separated by a space. If that is the case, all selections with any of those types will be shown.

Filtering by the Type Dropdown will only show the one type, hiding even the summary at the bottom.

Normally, the Type Dropdown will filter to only the type chosen but stay separated by area. Multiple Repeating groups separated by area will be shown.

If the Type ONLY toggle is clicked, then filtering by the Type Dropdown will only show the one type all in the same Repeating Group under one header (except tile. Tile is separated by wall and floor).

Interior Color Sheet

At the beginning, Wood, Carpet, Cabinet, Window Coverings, and Window Coverings Installation are divided by type. After that, every selection for the address is divided into sections based on the Area. If the house does not have that Area/Type, the repeating group is empty, and the group is hidden.

Each selection (without any "modes" such as Designer Mode or Hide Price) has information for the Area, Type, Vendor, Material, Color, Cost, Notes, Underlay/Edge, Grout, and Install Detail.

At the bottom of each section is the Total Cost for all selections inside the repeating group.

Repeating Groups

The repeating groups for each section in the Interior Color Sheet are sorted by Area and **Search for Selections:**

Address = the Searchbox's Value's Address

Option = STANDARD

Type is (varies by which section it is)

Custom Section (varies by if it is custom or not)

Type is in Dropdown - Type's value: split by ()

Builder Options

This section shows all builder options: Stain Color, Paint Color, Trim Color, Handrail Color, Cabinets Vendor, Cabinets Species/Color, and Cabinets Door Style.

Buyer Summary

The address and designer are also shown with the Buyer Summary. With the small PDF icon, just the Buyer Summary section is turned into a PDF named "address summary".

This section is for the finalized totals of every cost, as well as the signatures. If the type is empty (for example, there is no Vinyl in the house) the price is not shown as \$0, but instead everything for that type is hidden. If the type's actual total is \$0, that will be shown.

The Grand Total is repeated again at the very bottom of the summary above the signature lines.

Without Builder Mark

After clicking the notebook icon, the prices for everything *without* the builder mark are shown on the right.

The eye icons above both the Actual and Without Builder Mark sections will hide it again.

My Houses

The My Houses page has the same functionalities for all Suites.

My Active Houses

All of the User's houses are in this page. The User can search through everything either by address or by homeowner. Every house is shown, even those archived. But if they are archived, it says so and the date it was archived.

Users can also edit the houses. Once they click the edit button, the Popup Edit House is shown. The User cannot change the address or labor pricing, but everything else has a field that will change each section based on their inputs. If the house is archived, the Archive Checkbox is already pre-checked once the edit button is clicked, but it can be unchecked. Once it is unchecked, the address will be available in the Dropdown Houses on the Suite page again. (If the User unchecks then rechecks it, the date for the archive will change).

Search Products Across All Houses

If the User types a material into the search bar and that material exists in *any* house, the Addresses, Areas, and Creators that created the house that uses the material will show up across all suites. This is a great way to ensure no dropped products are being used in any active houses.

Markup

My Current Margin & Markup

The Margin and Mark to Builder's numbers are based on the saved numbers for each specific User.

Add a Builder

Add Builder to Database button is only visible if User's Can Edit is "yes".

Once the Add Builder to Database button is clicked, each input fields are filled in for the new created builder. Behind the scenes, the "Margin to CFC_" is edited and $= 1 - \text{margin}$ (from the input).

Builder Database

The edit/delete icons are only visible if User's Can Edit is "yes".

If they click the edit icon, then the "Popup Builder" shows up. There, the User can edit the name, margin, and mark to builder. Once they click "Save", the name, margin, and markup are changed to the input values. The "Margin to CFC_" is also updated and $= 1 - \text{margin}$ (from the new input).

Catalog

In the Catalog, there are pictures for customers coming into the design center to help them visualize the different kinds of patterns they could install in their homes.

There are no interactions on this page, just images.

Database

The Database page has the same functionalities for all Suites.

Database Manager

The Database Manager holds all Materials that the Design Center has. Because it holds so much information, there is multiple ways to filter/look through the database.

The User can sort the database by price, description, and labor in the first dropdown option. They can type in an exact description, or key words they want the description to contain in the next two input fields. In the dropdowns following, the User can pick a vendor, type, or size. They can also filter the price through ranges that appear once the range buttons in RadioButtons A are clicked (a slider will show up for more specific ranges).

The edit/delete icons are only visible if User's Can Edit is "yes".

If the edit icon is clicked, then the Popup Materials shows up. Once the User clicks Save, the Parent Group's Materials are all changed based on the respective inputs.

If the delete icon is clicked, then the Popup Delete Material shows up. The User must type in "delete" and click the Permanently Delete button to ensure clicking the icon was not an accident. Once they permanently delete the material, there is a check to make sure the input is exactly "delete" and the material is deleted.

Export Products

If the User clicks the Export Products button, they will download a CSV file to their computer with the Description, Type, Size, Vendor, Price, Labor, Mountain Labor, Waste, CTOP Reference Price, and Dropped information that is currently filtered out on the Database Manager. Without any filters, it will download every material.

Bulk Change Labor

Bulk Change Labor button is only visible if User's Can Edit is "yes".

If the User clicks the Bulk Change Labor button, the Popup Bulk Change Labor shows up. The maximum materials that can be changed is 200 (the workflow is terminated if there is more than 200). The respective fields are changed to their inputted values only if the confirmation input is

"Confirm" and the fields are not empty. If the fields are empty, that specific value will not be changed.

Add a Material

Add to Database button is only visible if User's Can Edit is "yes".

Once the User clicks the Add to Database button, a new material is created with the information corresponding to the input values.

Vendors

The edit/delete icons are only visible if User's Can Edit is "yes".

If the User clicks the edit icon, it brings up the Popup VENDOR, where the vendor's name is changed into whatever is in the input after the Save button is clicked.

If the User clicks the delete icon, it brings up the Popup Delete VENDOR. The vendor will only be deleted if the exact word "delete" is typed in the box and the Delete Permanently button is clicked.

Add Vendor

Add Vendor button is only visible if User's Can Edit is "yes".

Once the Add Vendor to Database button is clicked, the new vendor is added only if that vendor does not already exist to limit accidental duplicates.

Edges/Extras/Underlays

The edit/delete icons are only visible if User's Can Edit is "yes".

If the User clicks the edit icon, it brings up the Popup EXTRA, where the extra's name and labor is changed into whatever is in the input boxes after the Save button is clicked.

If the User clicks the delete icon, it brings up the Popup Delete EXTRA. The extra will only be deleted if the exact word "delete" is typed in the box and the Delete Permanently button is clicked.

Add Extra

Add Extra button is only visible if User's Can Edit is "yes".

Once the Add Extra to Database button is clicked, the new extra with its labor is added.

Install Detail

The edit/delete icons are only visible if User's Can Edit is "yes".

If the User clicks the edit icon, it brings up the Popup INSTALL, where the detail's name and labor is changed into whatever is in the input boxes after the Save button is clicked.

If the User clicks the delete icon, it brings up the Popup Delete INSTALL. The detail will only be deleted if the exact word "delete" is typed in the box and the Delete Permanently button is clicked.

Add Install Detail

Add Install Detail button is only visible if User's Can Edit is "yes".

Once the Add Install Detail to Database button is clicked, the new detail with its labor is added.

Dropped Products

No User can edit this section, it just shows the listings of all previously dropped products and it can be searched by the product's description.

Edited Products

No User can edit this section, it just shows the listings of all previously modified products and it can be filtered by month. The "month" dropdown shows all months where products have been modified dating back one year to the day.

The repeating group is filtered by the months dropdown by seeing if the material's modified date is between the date in the dropdown and that date plus 1 month.

The idea of this section is to see if any products in a house need to be refreshed (saved without editing anything) to bring them to the most accurate pricing to date. If a user edits a material, but a selection already has the material set, there is no automatic change - that would affect past houses, which would add confusion.

Bid Suite

The Design Suite and Bid Suite are similar, but not exactly the same.

House Details

On page load, the House Details are filled with their initial content of the User's previously worked on address's information. Each does a **Search for House Details** based on the address of the House Dropdown value which is in the House Selections section of the page. The User does not edit the house details here - it is for inputting house details for a new address only. The inputs are disabled until the House icon is clicked.

The Admin Mode toggle is only shown for Users with the *master-admin* role, and if selected all non-archived houses are available in the House Dropdown, not just the ones the User has created or the ones that have been shared with the User.

Creating a New House

The House Icon brings the user to "Creating a New House Mode" to allow the User to fill in all fields for a new address.

The Labor Pricing Dropdown has three options: Production, Custom, and Mountain. If Production is chosen, Production Labor is "yes". If Custom is chosen, nothing is set to "yes". If Mountain is chosen, Mountain is "yes". These three options play a big role in determining the cost of selections.

Note: "Production" is the same as "Semi-Custom" in the Design Suite. The two have different labels for the customers.

Upload Template

Once all inputs are filled in, the User clicks the Upload Template Button.

Here, the User must follow the 5 steps described on the Upload Template Popup. The "0/2 Tasks Completed" refers to the two main tasks: clicking the Upload Now button and the Finish Uploading button.

First, the User must make sure all House Details fields are inputted correctly.

Then, the User must either upload a file or select a pre-uploaded template.

Next, the User must map the fields in the correct dropdowns so that the upload is done correctly.

Now, the User clicks the "Upload Now" button. If there is no error, once this is complete, the Tasks Completed now says "1/2 Tasks Completed".

Here, if the Address, Builder, Pricing, Plan #, or Bid Creator, House Margin, or House Builder Mark fields are empty, the Address is a duplicate, or the User clicked the button twice, an error pops up and the workflow is terminated.

All that is left is for the User to click the Finish Uploading button. Once that has loaded, the Tasks Completed now says "2/2 Tasks Completed" and the popup closes.

Bid Suite

This repeating group does a **Search for Selections** sorted by Area:

Any field contains Input Search Filter's value

Address = Dropdown Houses's value

Option = STANDARD

The group shows the Area, Type, Vendor, Material, Color, Takeoff, Price, Notes, Internal Notes, Underlay/Edge, Grout, Install Detail, Waste, and UOM.

For regular Users not in Admin Mode, the only options in the House Dropdown are the non-archived addresses they have created *or the addresses that have been shared with them*. The User selects an address in the House Dropdown, and can search any field, view history, view trash, bulk change material, bulk change waste, archive house, delete house, share house, or filter the selections by special view.

Under the repeating group is the entire house's Total Price.

Note: "Price" is the same as "Cost" in the Design Suite.

Search Any Field

The Search Any Field input is a way to filter selections in the Main Repeating Group. Users can search without needing an entire word (i.e. can search powder just by typing pow) since the Main Repeating Group is doing a **Search for Selections** that is sorted by Area and filtered **Advanced**:

This Selection's Area:lowercase contains Input Search Filter's value *or* This Selection's Type:lowercase contains ... etc.

It lists the above condition for each section of the Main Repeating Group, as there is not an "any field contains" option *if the User does not type the entire word*.

View History

When the User clicks the View History button, it shows the Popup EDITED, where the repeating group can be filtered by area and type, and searched by any field. The repeating group does a **Search for Selections** sorted by Area and filtered:

Address = Dropdown Houses's value

Any field contains Input Search Filter - edited popup's value

Type = Dropdown Type for EDITED's value

Area = Dropdown AREA for EDITED's value

The dropdowns only allow selections with the Option = EDITED. An option becomes EDITED any time the pencil icon is clicked and the changes are saved on the main House Selections page.

The User can bring back the selection by clicking the undo icon, which changes the option back to STANDARD.

View Trash

When the User clicks the View Trash button, it shows the Popup trash, where the repeating group can be filtered by area and type, and searched by any field. The repeating group does a **Search for Selections** sorted by Area and filtered:

Address = Dropdown Houses's value

Any field contains Input Search Filter - edited popup's value

Type = Dropdown Type for TRASH's value

Area = Dropdown AREA for TRASH's value

The dropdowns only allow selections with the Option = DELETED. An option becomes DELETED any time the trash icon is clicked and the changes are saved on the main House Selections page.

The User can bring back the selection by clicking the undo icon, which changes the option back to STANDARD.

Bulk Change Material

When the User clicks the Bulk Change Material button, it shows the Popup Swap bulk materials. Here, the User selects a type in the dropdown and can either change the type entirely (or leave that dropdown blank), change the color for every instance of that type, or change the material for every instance of that type.

If the User has filtered the Main Repeating Group in any way (by typing in the "search any field" input) then *only those selections will be changed*. For example, if the User only wants to change all countertops in Bath 1, that is an option.

When the User clicks save:

The selections are copied and all saved as Option = EDITED.

The original selections are changed based on the new material added.

The cost is updated based on the labor that's been selected, the new material, and the user's margin.

Bulk Change Waste

When the User clicks the Bulk Change Waste button, it shows the Popup change waste. Here, the User selects a type in the dropdown and enters the decimal format of the new waste percentage (0.03, not 3%).

When the User clicks save:

The selections are copied and all saved as Option = EDITED.

The original selections are changed based on the new waste added.

The cost is updated based on the labor that's been selected, the new waste, and the user's margin.

Archive House

When the User clicks the Archive House button, there is a **Search for House Details** that looks for the address and changes:

Archived = "yes"

Date Archived On = Current date/time

Once a house is archived, it is no longer available for any User in the Houses dropdown. If archiving was a mistake, the User can go to My Houses, search the address, edit the house, and unclick the archived checkbox.

Delete House

When the User clicks the Delete House button, it shows the Popup Delete as a failsafe in case clicking that button was an accident. Once the house is deleted, all data for it is lost. If the User clicks Yes to delete, there is a **Search for Selections** for that address and a **Search for House Details** for that address that are both deleted.

Share House

When the User clicks the Share House button, it shows the Popup share house. In the dropdown, the User must pick the email of the User they would like to share the house with (Receiver). Once they click the Share button, there is a **Search for House Details** that looks for the address and adds the Receiver's email in the dropdown to the list of "Receiver".

Now this house's address and bid creator will appear in the Receiver's Shared tab.

Now this house's address will appear in the Receiver's Houses Dropdown.

Special View

This dropdown can filter the Main Repeating Group by selections if they are "confirmed" or not. The total price under the Main Repeating Group also changes, so the only information shown is for the selections the dropdown has filtered down to. If the User Bulk Changes a Material, they would only change the selections shown with the special view.

Each confirmed selection has a green check mark on the left side.

The user can "confirm" a selection if they click the "confirm" checkbox in the Popup Selection.

Edit Icon

If the User clicks the edit icon on an individual selection, the Popup Selection is shown. Here, the User can edit any aspects of the selection needed. If the inputs are left blank, there will be no change. Once the User clicks Save:

The User's margin and mark is updated.

If the Type is TILE but the dropdown for FLOOR/WALL is empty, there will be an error shown and the workflow terminates.

The selection is duplicated and saved with the option EDITED.

The selection's information is updated based on the inputs and if the **Search for House Details** Production Labor and Mountain are yes/no (since that affects labor prices).

The margin and mark for the house are changed based on the updated information.

Trash Icon

If the User clicks the trash icon on an individual selection, the Floating Group A is shown to tell the User the app is loading, and the selection's option is changed to DELETED.

Refresh Pricing

When the User clicks the Refresh Pricing button it shows the Popup Refresh Pricing.

Once the User clicks the second Refresh Pricing button, the pricing is re-calculated based on the User's margin and markup, the labor pricing, and all of the materials. There is feedback for the User on the Popup since this process can take a while.

Add a Selection

The User can input any information in the Add a Selection section for a new selection to be added to the house with the address in the Houses Dropdown. Once everything the User needs to be filled is inputted, they can click the Add to House Selections Button and then:

If there is no address, the workflow terminates.

The User's margin and mark is updated.

If the Type is TILE but the dropdown for FLOOR/WALL is empty, there will be an error shown and the workflow terminates.

The new House Details are created based on the inputs.

A new Selection is created based on the inputs and if the **Search for House Details** Production Labor and Mountain are yes/no (since that affects labor prices).
The margin and mark for the house are changed based on the updated information.

Builder Options

The dropdown does **Search for Selections** for all options that are not custom options and where the item's option is not STANDARD or EDITED.

The repeating group does a **Search for Selections** sorted by Option and filtered:

Any field contains Input Search Filter's value
Address = Dropdown Houses's value
Option = Dropdown Option's value
Custom Option <> yes (does not equal yes)

The User can add the option by clicking the plus icon. When that happens:

The old STANDARD option now is "Previous standard(s)" with notes that say "Previous standard. Your option replaced this."
The option the User wants to add becomes STANDARD with notes that say "option added".
The costs are changed based on the new selection.

The User can delete an option by clicking the minus icon that appears in the House Selections section. When that happens:

The option is changed.
The costs are changed based on the selection being erased.

Custom Options

All the same as the Builder Options, except it is filtered by when Custom Option = yes.

Download Options

Each download link at the bottom will create and download a CSV file based on the House's information.

Bid Sheet

The Color Sheet and Bid Sheet are similar, but not exactly the same.

The top section allows the User to lookup an address to get all of its information. Shown below the search bar is the Designer assigned to the job. In the middle of the page is the information from when the Designer first created the address in the Design Suite page:

Builder Info: Builder, Subdivision, Plan #

CFC Info: Designer, CFC Map Area, Job #

Dates: Original Selection Date, Revised Selection Dates

Note: "Creator" is the same as "Designer" in the Design Suite.

The User can add a revision date in the input area under Revised Selection Dates. Once they click the save icon, the date is stored in the list Date Revisions and shown above the input field.

The buttons on the right allow the User to export the whole color sheet, except for all elements with the ID IGNORE (like the icons) as a PDF, export the selections, or add files/images to the bottom of the page.

Allowance shows a section at the bottom where an allowance can be added that will be subtracted from the grand total.

View Margin shows the margin numbers right underneath the toggle.

The Grand Total shows the total price for the entire Bid Sheet.

Type Dropdown

This dropdown will filter every selection to only show those with the type chosen. Some of the lines are multiple options (i.e. CARPET PAD) separated by a space. If that is the case, all selections with any of those types will be shown.

Filtering by the Type Dropdown will only show the one type, hiding even the summary at the bottom.

Bid

Every selection for the address is divided into sections based on the Type. If the house does not have that Type, the repeating group is empty, and the group is hidden.

Each selection has information for the Area, Type, Vendor, Material, Color, Takeoff, Price, Notes, Underlay/Edge, Grout, Install Detail, Waste, and UOM.

At the bottom of each section is the Total Price for all selections inside the repeating group.

Repeating Groups

The repeating groups for each section in the Bid Sheet are sorted by Area and **Search for Selections**:

Address = the Searchbox's Value's Address

Option = STANDARD

Type is (varies by which section it is)

Custom Section (varies by if it is custom or not)

Type is in Dropdown - Type's value: split by ()

Summary

The address and creator are also shown with the Summary. With the small PDF icon, just the Summary section is turned into a PDF named "address summary".

This section is for the finalized totals of every price. If the type is empty (for example, there is no Vinyl in the house) the price is not shown as \$0, but instead everything for that type is hidden. If the type's actual total is \$0, that will be shown.

The Grand Total is repeated again at the very bottom of the summary.

UOM

After clicking the notebook icon, the UOMs are shown on the right: SQFT, LF, EACH, and YDS. If the type does not have that particular UOM, the amount is 0 (if it was hidden, there would be holes in the summary).

The eye icons above both the Types and UOM sections will hide it again.

Shared

Shared with Me

The repeating group shows the address and bid creator for all houses shared with the current User by **Search for House Details**:

Address = the Searchbox's Value's Address

Receiver contains Current User

The User cannot edit the Bids from this page. It works more as a reference to see who created the original Bid and what houses they have access to that they did not originally create.

If the User wants to edit a Bid shared with them, they must go to the Bid Suite and select the address in the Houses Dropdown.