

**BUILD
YOUR
HOME**



- quick guide -



builderUX





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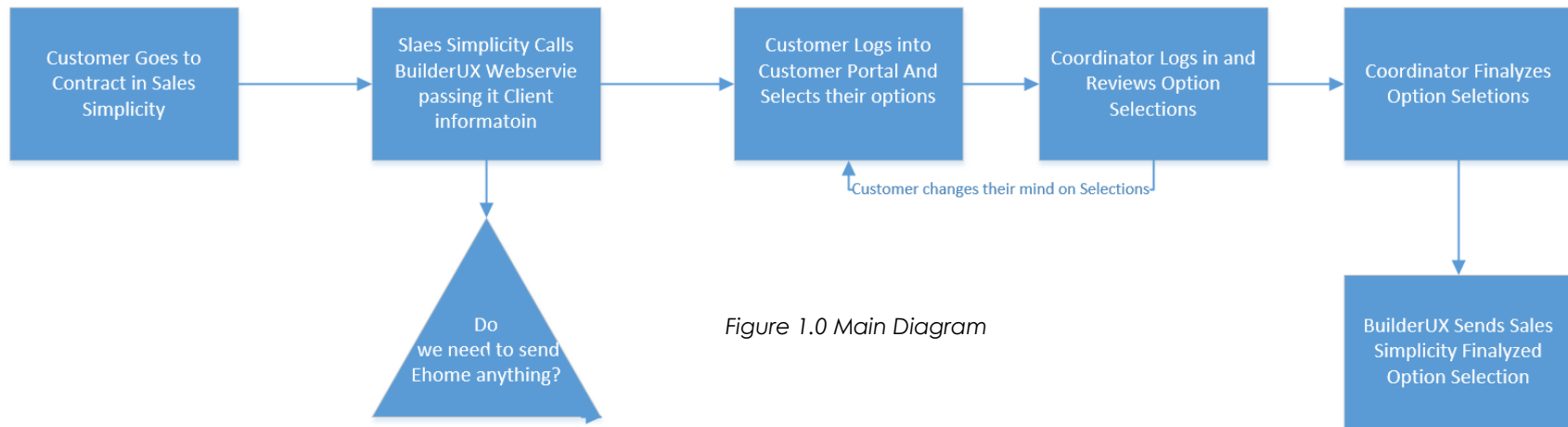


Figure 1.0 Main Diagram

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

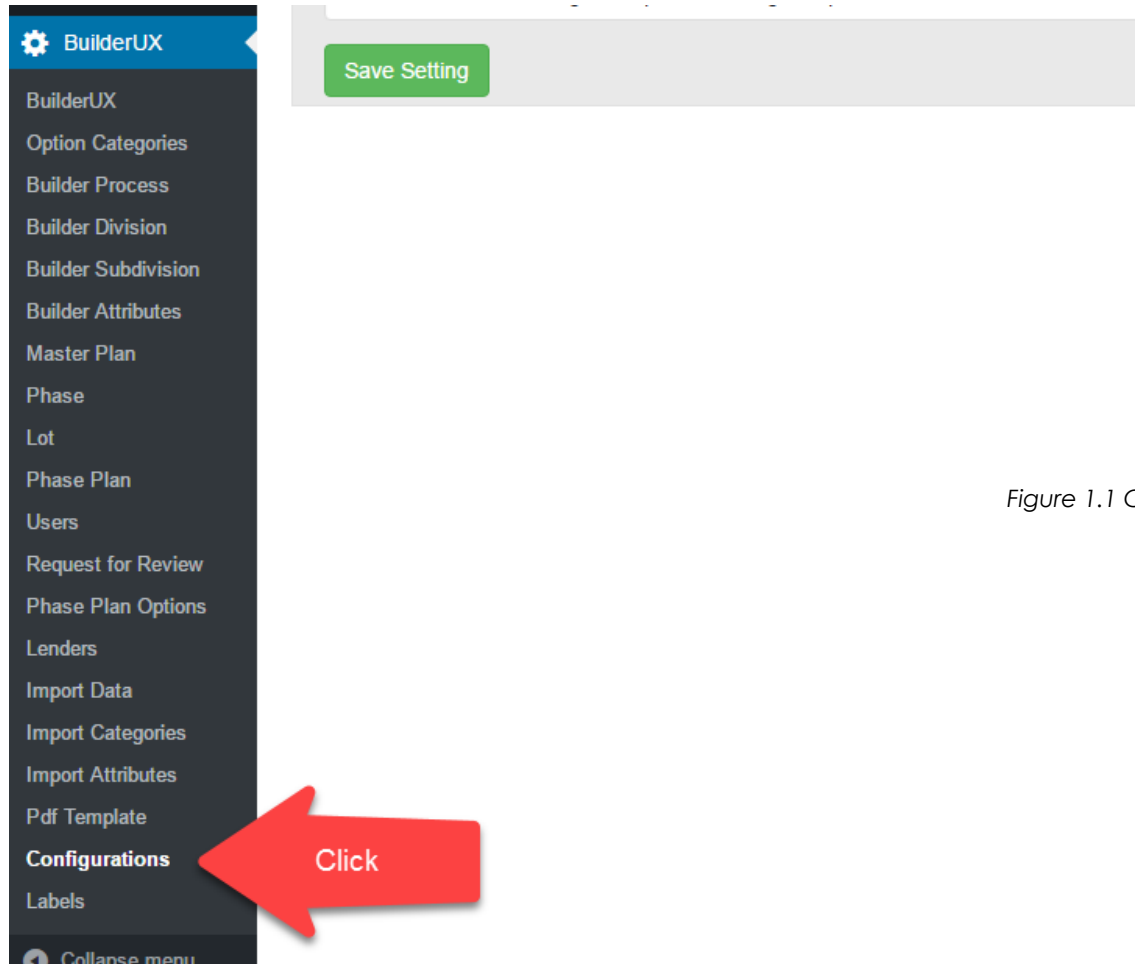
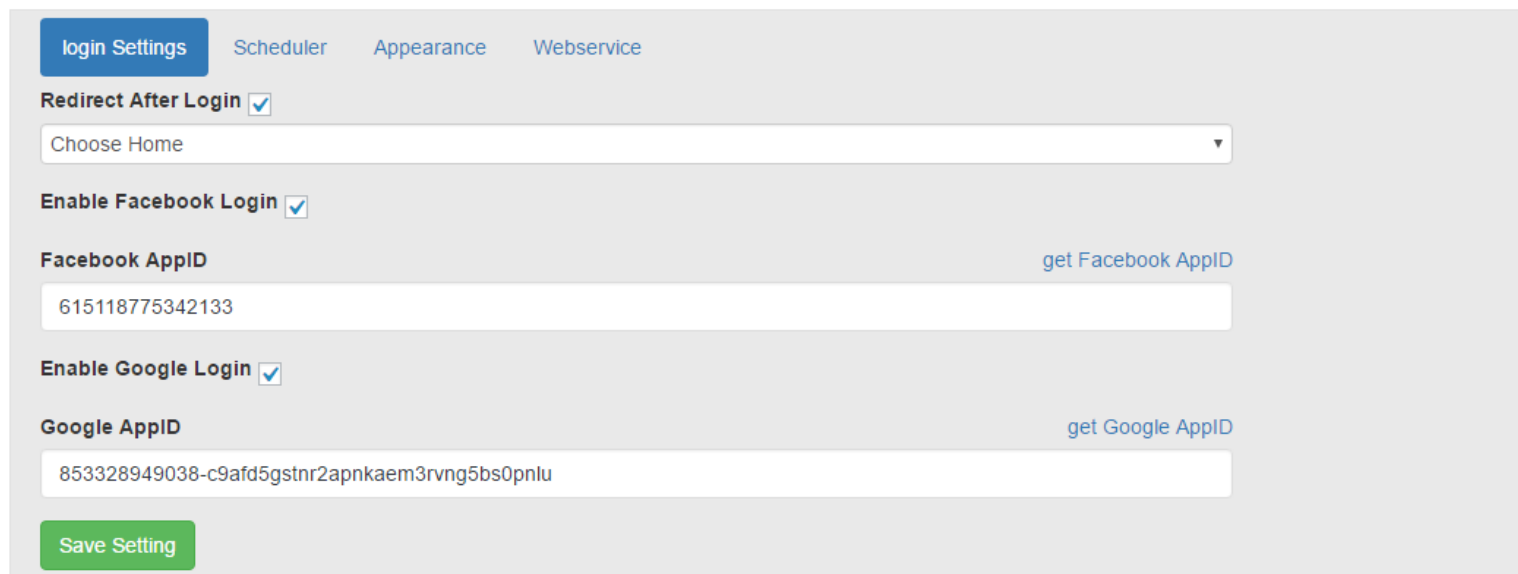


Figure 1.1 Configuration Settings

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



The screenshot shows the 'login Settings' tab selected in the BuilderUx Settings panel. The panel has four tabs: 'login Settings', 'Scheduler', 'Appearance', and 'Webservice'. Under 'login Settings', there are several options: 'Redirect After Login' is checked, with a dropdown menu showing 'Choose Home'; 'Enable Facebook Login' is checked; 'Facebook AppID' is set to '615118775342133' with a 'get Facebook AppID' link; 'Enable Google Login' is checked; 'Google AppID' is set to '853328949038-c9afd5gstnr2apnkaem3rvng5bs0pnlu' with a 'get Google AppID' link; and a 'Save Setting' button at the bottom.

Facebook AppID

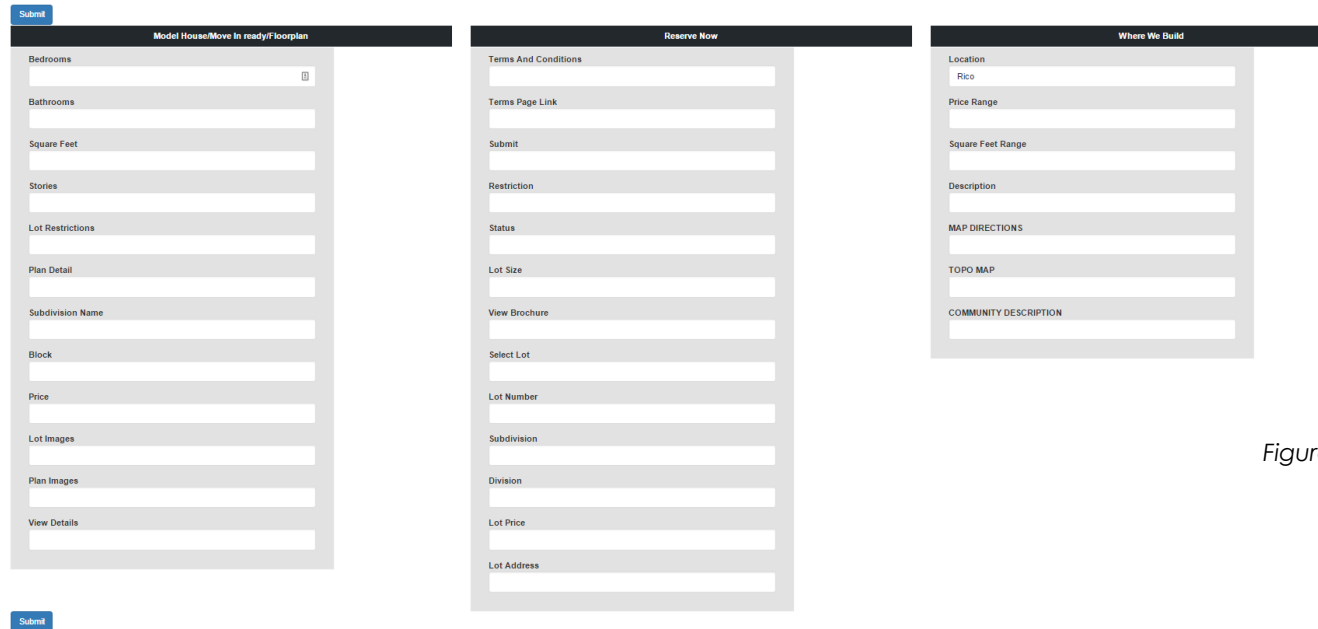
Figure 1.2 Input fields for logins

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.

BuilderUX Labels



The screenshot shows the 'BuilderUX Labels' configuration page. It has a 'Submit' button at the top left. The page is divided into three main sections, each with a dark header bar and a list of form fields with edit icons:

- Model House/Move in ready/floorplan**: Contains fields for Bedrooms, Bathrooms, Square Feet, Stories, Lot Restrictions, Plan Detail, Subdivision Name, Block, Price, Lot Images, Plan Images, and View Details.
- Reserve Now**: Contains fields for Terms And Conditions, Terms Page Link, Submit, Restriction, Status, Lot Size, View Brochure, Select Lot, Lot Number, Subdivision, Division, Lot Price, and Lot Address.
- Where We Build**: Contains fields for Location, Price Range, Square Feet Range, Description, MAP DIRECTIONS, TOPO MAP, and COMMUNITY DESCRIPTION.

Each field has a small edit icon (a square with a diagonal line) next to it, indicating it can be renamed.

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.

Model House/Move In ready/Floorplan

Bedrooms

Bathrooms

Square Feet

Stories

You can rename this field and it will change in your website

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.

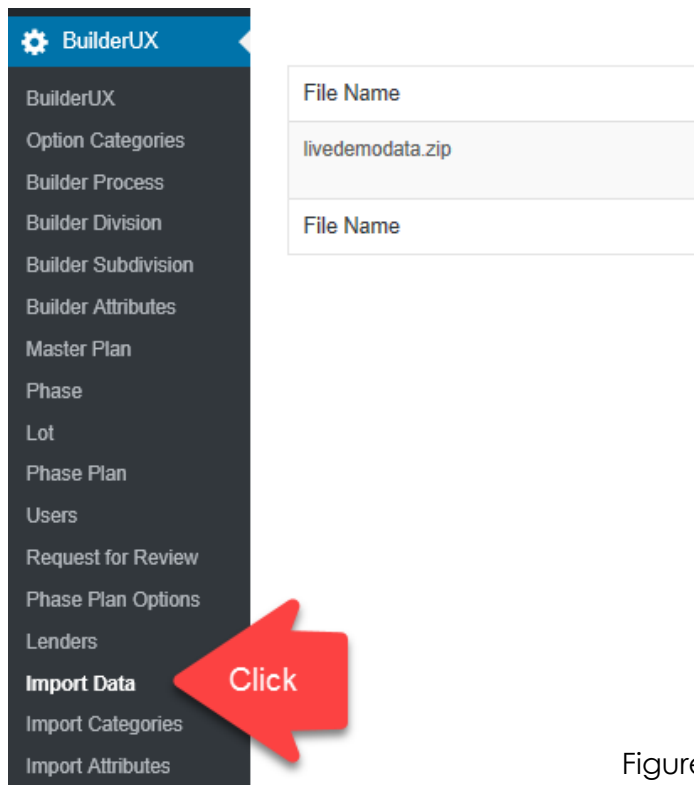


Figure 1.5 Import Data

Figure 1.5

Upload File

Upload By Url(ZIP)

Maximum Upload Size is 6.8359375 GB

Upload File(XML)*

Browse...

Upload File

Step 1) Enter URL here when you want to upload via URL

BuilderUx Uploaded XML

Search

File Name	Import Status	Created	Action
livedemodata.zip	Pending	2016-12-30	<div>Import</div> <div>Delete</div>
File Name	Import Status	Created	Action

Figure 1.6 Input Field for Upload

Upload File

Upload By Url(ZIP)

Maximum Upload Size is 6.8359375 GB

Upload File(XML)*

Browse...

Upload File

When you have a zip file to upload use this Browse and then hit the "Upload File" Button

BuilderUx Uploaded XML

Search

File Name	Import Status	Created	Action
livedemodata.zip	Pending	2016-12-30	<div>Import</div> <div>Delete</div>
File Name	Import Status	Created	Action

Figure 1.7 Upload Button

Or

Maximum Upload Size is 6.8359375 GB

Upload File(XML)*

Browse...

BuilderUx Uploaded XML

File Name	Import Status	Created	Action
livedemodata.zip	Pending	2016-12-30	<input type="button" value="Import"/> <input type="button" value="Delete"/>
File Name	Import Status	Created	Action

Figure 1.8 Action Buttons

IMPORT XML

243512 Out of 2376364 imported

attributes(9530 / 9530)	<input type="button" value="Imported"/>	builder(1 / 1)	<input type="button" value="Imported"/>
categories(52 / 52)	<input type="button" value="Imported"/>	division(1 / 1)	<input type="button" value="Imported"/>
lenders(21 / 21)	<input type="button" value="Imported"/>	lotattachment(1 / 1)	<input type="button" value="Imported"/>
lotplanmatrix(14402 / 14402)	<input type="button" value="Imported"/>	masteroptions(22327 / 22327)	<input type="button" value="Imported"/>
masterplan(59 / 59)	<input type="button" value="Imported"/>	masterplanattachment(26 / 26)	<input type="button" value="Imported"/>
optionsrule(0 / 0)	<input type="button" value="Import"/>	phase(72 / 72)	<input type="button" value="Imported"/>
phaseclot(650 / 650)	<input type="button" value="Imported"/>	phaseplan(1296 / 1296)	<input type="button" value="Imported"/>
phaseplanattachment(1 / 1)	<input type="button" value="Imported"/>	subdivision(37 / 37)	<input type="button" value="Imported"/>
topoinimage(31 / 31)	<input type="button" value="Imported"/>	topoxycord(577 / 577)	<input type="button" value="Imported"/>
user(59 / 59)	<input type="button" value="Imported"/>	phaseplanoption1(9997 / 9997)	<input type="button" value="Imported"/>
phaseplanoption2(94300 / 99999)	<input type="button" value="Import"/>	phaseplanoption3(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption4(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption5(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption6(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption7(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption8(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption9(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption10(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption11(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption12(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption13(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption14(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption15(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption16(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption17(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption18(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption19(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption20(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption21(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption22(0 / 99999)	<input type="button" value="Import"/>	phaseplanoption23(0 / 99999)	<input type="button" value="Import"/>
phaseplanoption24(0 / 27164)	<input type="button" value="Import"/>		

Import All Files

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

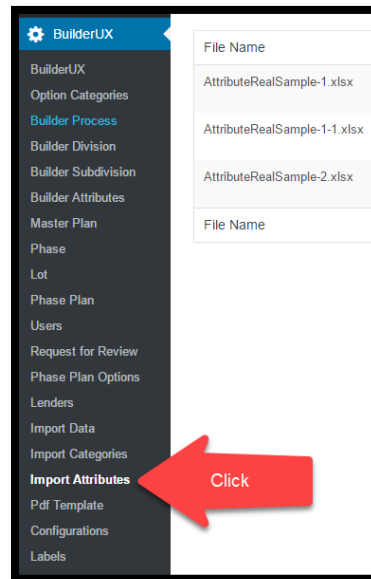


Figure 1.10 Import Attributes Options

File imported successfully

Upload File

Upload File(xlsx)*
 Choose File | No file chosen
 Upload file

BuilderUx Uploaded Attributes xlsx

Search

File Name	Import Status	Created	Action
AttributeRealSample-1.xlsx	Completed	2016-12-29	Import Delete
AttributeRealSample-1-1.xlsx	Completed	2016-12-30	Import Delete
AttributeRealSample-2.xlsx	Completed	2017-01-01	Import Delete
File Name	Import Status	Created	Action

Step1 Choose Download a Sample

Download Sample

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

	A	B	C	D	E	F	G	H	I	J
1	DivisionNum	SubdivisionNum	Option category Name	Option Subcategory Name	Question	Answer	UseText	PriceChange	attribute_image	
2	SFH	SFH-01	Appliances	Washers	What Color Do you want your washer to be?	Purple	1	25	https://www.sitepoint.com/wp-content/themes/sitepoint/assets/images/icon	
3	SFH	SFH-01	Appliances	Dryers	What Color Do you want your dryer to be?	Pink	0	25	https://www.sitepoint.com/wp-content/themes/sitepoint/assets/images/icon	
4										
5										
6										

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.

File imported successfully

Upload File

Step 3 Choose a file to Upload

Upload File(xlsx)*

Choose File | No file chosen

Upload file

Download Sample

BuilderUx Uploaded Attributes.xlsx

Search

File Name	Import Status	Created	Action
AttributeRealSample-1.xlsx	Completed	2016-12-29	Import Delete
AttributeRealSample-1-1.xlsx	Completed	2016-12-30	Import Delete
AttributeRealSample-2.xlsx	Completed	2017-01-01	Import Delete
File Name	Import Status	Created	Action

Figure 1.13 Uploading File

File imported successfully

Upload File

Upload File(xlsx)* Download Sample

Choose File | No file chosen

Upload file

BuilderUx Uploaded Attributes xlsx

Search

File Name	Import Status		Action
AttributeRealSample-1.xlsx	Completed		Import Delete
AttributeRealSample-1-1.xlsx	Completed		Import Delete
AttributeRealSample-2.xlsx	Completed	2017-01-01	Import Delete
File Name	Import Status	Created	Action

Step 4 Click "Import" on the file you just uploaded.

Figure 1.14 Action Button For Options

Categories

WordPress 4.7 is available! Please update now.

Upload File

Upload File(xlsx)*
 No file chosen

BuilderUx Uploaded Categories xlsx

File Name	Import Status	Created	Action
Category_Sample.xlsx	Completed	2016-12-29	<input type="button" value="Import"/> <input type="button" value="Delete"/>
Category_Sample-1.xlsx	Completed	2016-12-30	<input type="button" value="Import"/> <input type="button" value="Delete"/>
Category_Sample-2.xlsx	Completed	2016-12-30	<input type="button" value="Import"/> <input type="button" value="Delete"/>
CategoriesRico2.xlsx	Completed	2017-01-01	<input type="button" value="Import"/> <input type="button" value="Delete"/>
CategoriesRico2-1.xlsx	Completed	2017-01-01	<input type="button" value="Import"/> <input type="button" value="Delete"/>
File Name	Import Status	Created	Action

Figure 1.15 Downloading Sample

Division Code	OptionGroupName	Subcategory Name	Seq	Active		
SFH	Appliances	Washers	1	1		
SFH	Appliances	Dryers	3	1		
SFH	Appliances	Toasters	2	0		

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.

WordPress 4.7 is available! [Please update now.](#)

Upload File

Upload File(xlsx)*

Choose File

No file chosen

Upload File

Download Sample

Step 2) Choose your file and upload it

BuilderUx Uploaded Categories xlsx

Search

File Name	Import Status	Created	Action
Category_Sample.xlsx	Completed	2016-12-29	<div>Import</div> <div>Delete</div>
Category_Sample-1.xlsx	Completed	2016-12-30	<div>Import</div> <div>Delete</div>
Category_Sample-2.xlsx	Completed	2016-12-30	<div>Import</div> <div>Delete</div>
CategoriesRico2.xlsx	Completed	2017-01-01	<div>Import</div> <div>Delete</div>
CategoriesRico2-1.xlsx	Completed	2017-01-01	<div>Import</div> <div>Delete</div>
File Name	Import Status	Created	Action

Figure 1.17 Choosing File to Upload

WordPress 4.7 is available! Please update now.

Upload File

Upload File(xlsx)* Download Sample

Choose File No file chosen

Upload file

BuilderUX Uploaded Categories xlsx

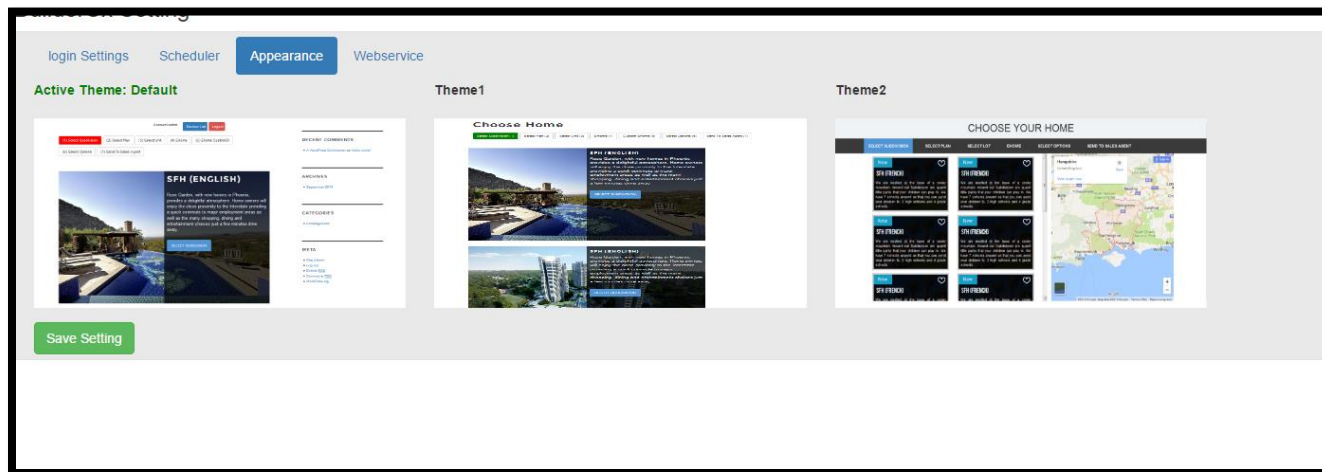
Search

File Name	Import Status	Created	Action	
Category_Sample.xlsx	Completed	2017-01-01	Import	Delete
Category_Sample-1.xlsx	Completed		Import	Delete
Category_Sample-2.xlsx	Completed		Import	Delete
CategoriesRico2.xlsx	Completed	2017-01-01	Import	Delete
CategoriesRico2-1.xlsx	Completed	2017-01-01	Import	Delete
File Name	Import Status	Created	Action	

Step 3) Click Import on the file you want to import

Figure 1.18 Action Buttons for builderUX Categories

Style



Themes

Theme 1

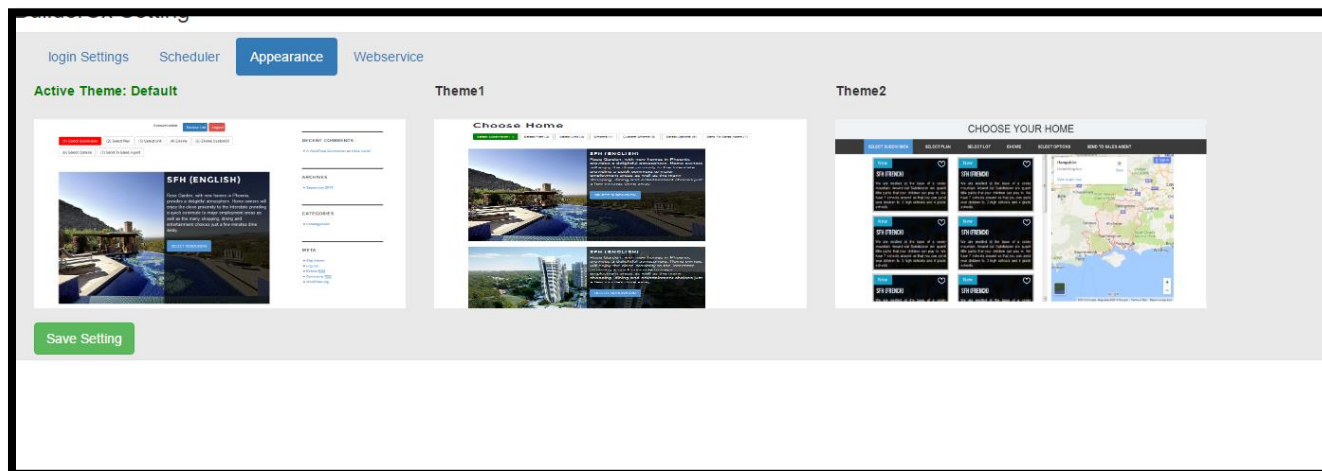


Figure 1.20 Selecting Themes

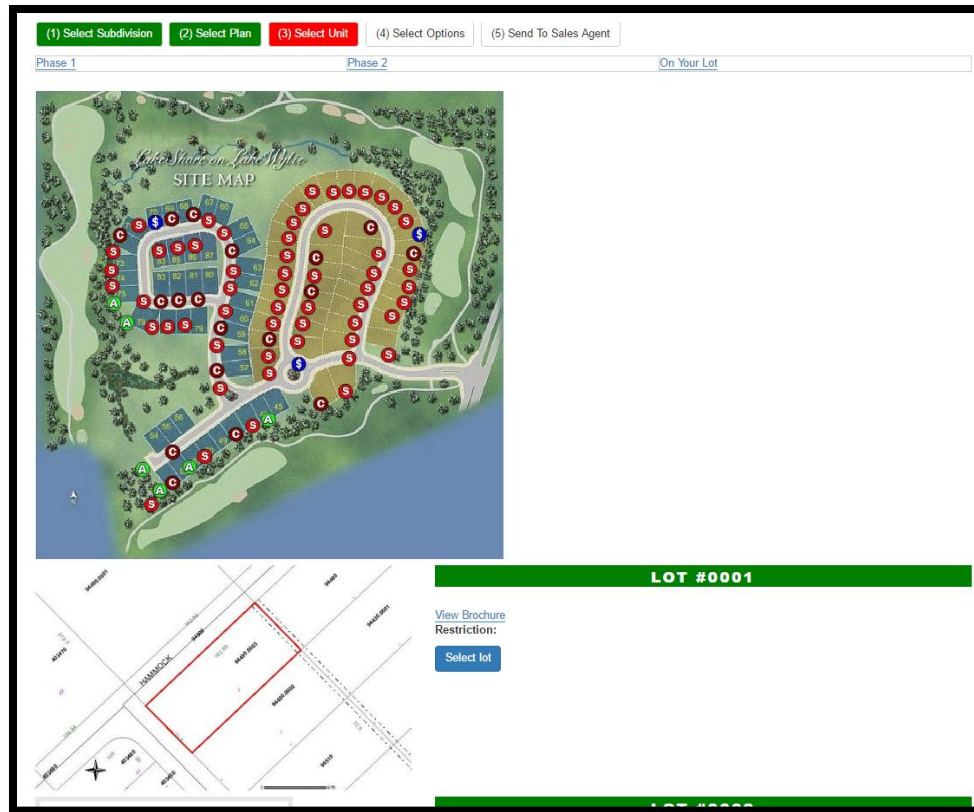


Figure 1.21 Theme Interfaces

Account Admin

Review List

Logout

(1) Select Subdivision

(2) Select Plan

(3) Select Unit

(4) Select Options

(5) Send To Sales Agent

Elevation

Elevation A Subcat

Baseboard

My test category

test category

Cabinets

Closet Organizers

Countertops

Doors

Electrical

Fireplace

Flooring

Garage

Kitchen Sink

Misc Fees


Plumbing

Pre-Wire

Shower Enclosure

Pool

Search Product...



Elevation A

Select this item: 1

Plan

Tuscany

Phase

Phase 1

Lot

SFH1-0001

Lot Address

9399 West End Ave, AZ

Options and Calculation Details:

Total 0

Submit for Review

Figure 1. 22 Selecting Options

Theme2

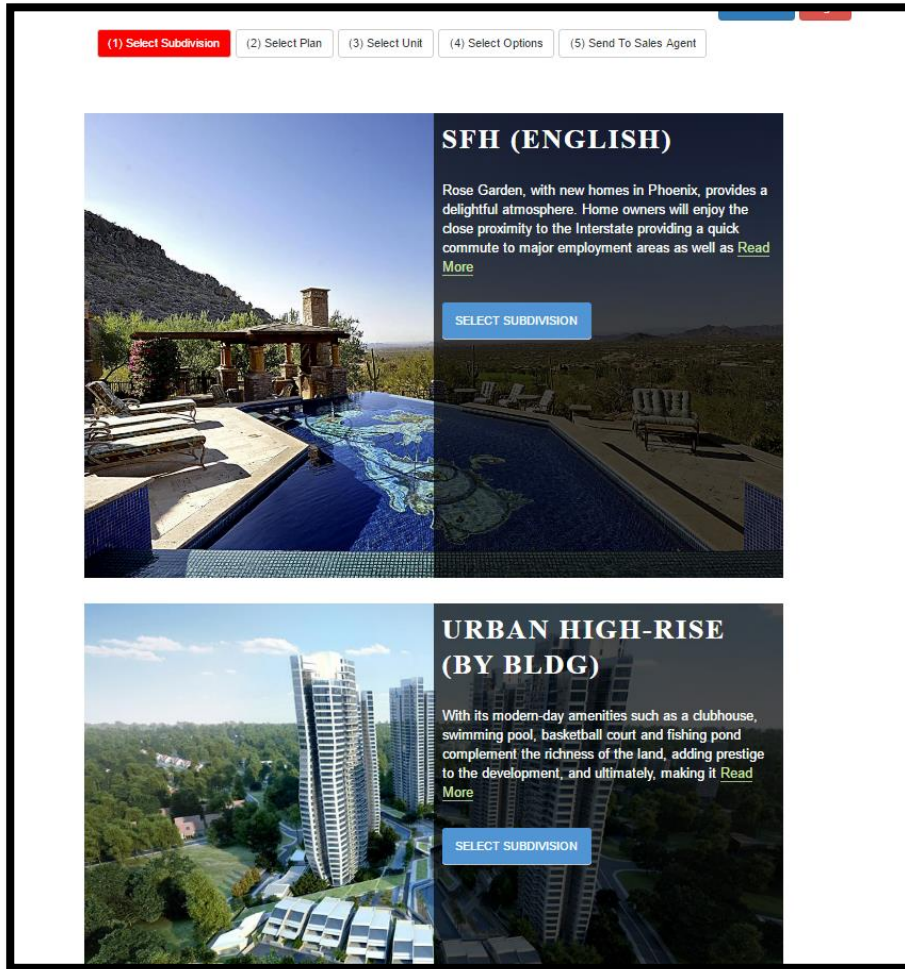


Figure 1. 23 Selecting Subdivisions

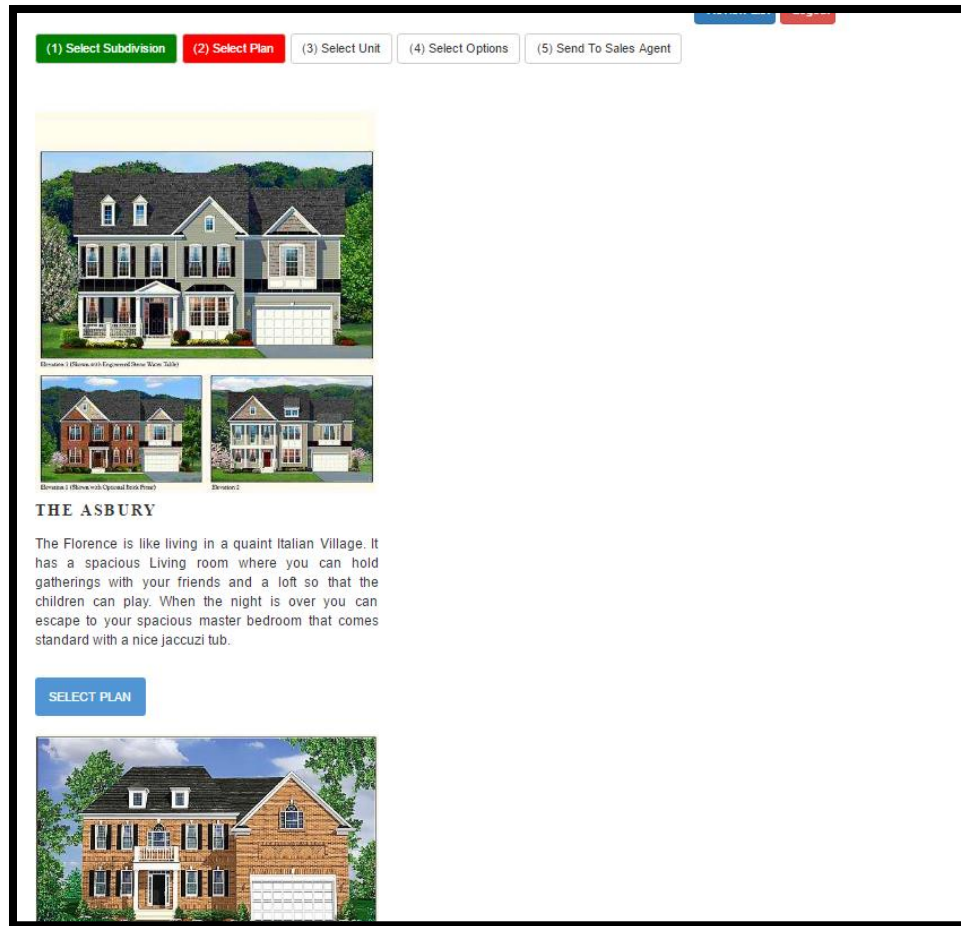


Figure 1. 24 Selecting Plans

Figure 1. 25 Submit for Review

[Review List](#) [Logout](#)

(1) Select Subdivision
(2) Select Plan
(3) Select Unit
(4) Select Options
(5) Send To Sales Agent

Elevation +

Baseboard +

Cabinets

Closet Organizers

Countertops

Doors

Electrical

Fireplace

Flooring

Garage

Kitchen Sink

Misc Fees

Plumbing

Pre-Wire

Shower Enclosure

Pool


** Custom Request

**

Custom Features


Packages

Search Product...



Elevation B

☐ Select this item: 1 ▼



Elevation C

☐ Select this item: 1 ▼

NO IMAGE AVAILABLE

bptest

☐ Select this item: 1 ▼

Plan

Tuscany

Phase

Phase 1

Lot

SFH1-0001

Lot Address

9399 West End Ave, AZ

Options and Calculation Details:

Total: 0

Submit for Review

Theme3

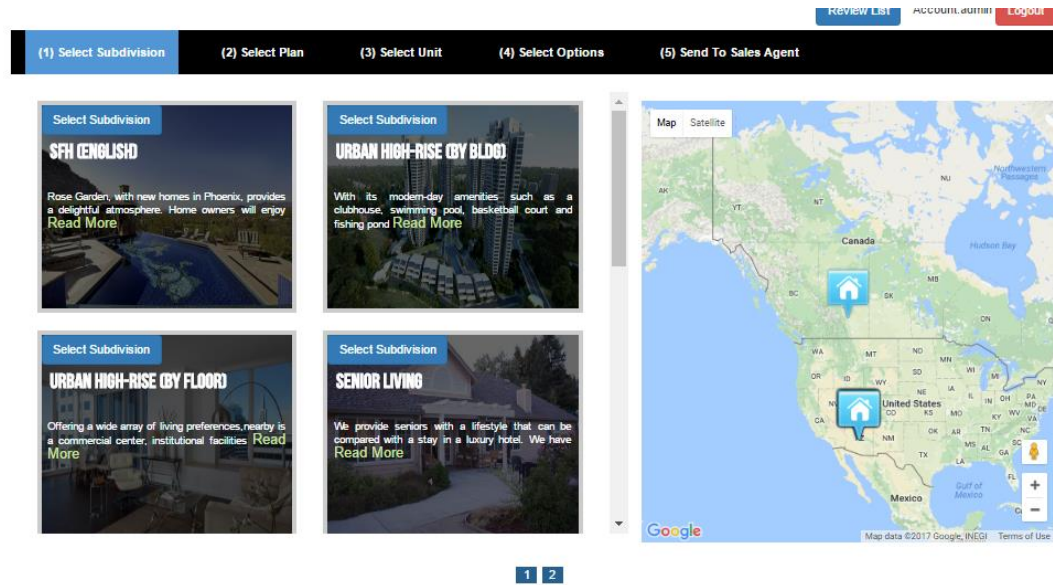


Figure 1.26 Theme 3 Select Subdivisions

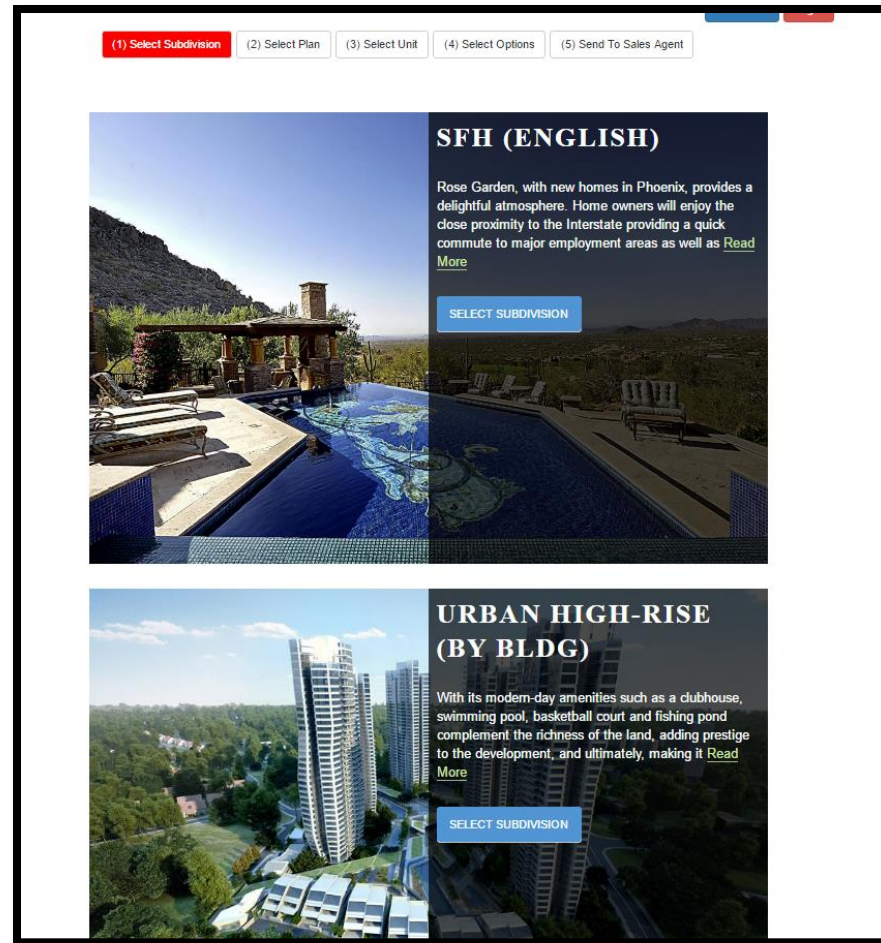


Figure 1. 27 Select Subdiviion from Themes

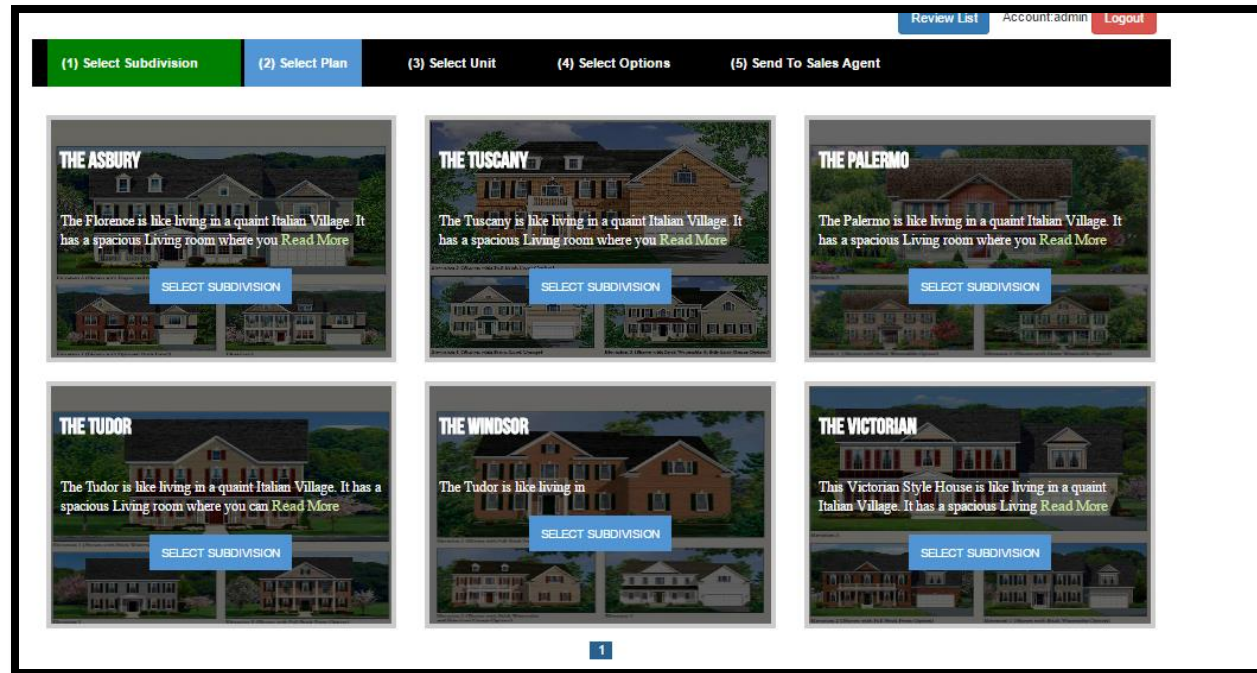


Figure 1. 28 Select Subdivision

(1) Select Subdivision

(2) Select Plan

(3) Select Unit

(4) Select Options

(5) Send To Sales Agent

Elevation

Elevation A Subcat

Baseboard

Cabinets

Closet Organizers

Countertops

Doors

Electrical

Fireplace

Flooring

Garage

Kitchen Sink

Misc Fees

Plumbing

Pre-Wire

Shower Enclosure


Pool

** Custom Request

Custom Features

Packages


Search Product...



ELEVATION B

Select this item

1



ELEVATION C

Select this item

1

NO IMAGE AVAILABLE

BPTST

Select this item

1

PLAN: THE ASBURY

PHASE: PHASE 1

LOT: SFH1-0001

DRESS: 9399 WEST END AVE, AZ

OPTIONS AND CALCULATION DETAILS:

TOTAL:0

SUBMIT FOR REVIEW

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.

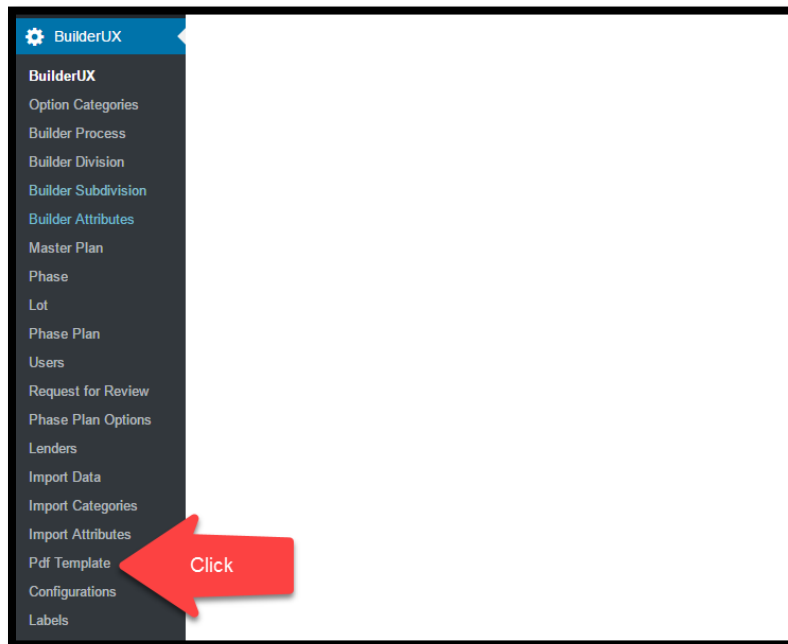


Figure 1. 30 Selecting PDF Templates

PDF Template Setting

Email Message

Insert Shortcode

{{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}}

Add Media
Visual
Text

b
i
link
b-quote
del
ins
img
ul
ol
li
code
more
close tags

```

<p style="font-size: 13px;">
<strong>You can contact us anytime at</strong> <br />
<strong>{{info_email}}</strong><br />
<strong>{{info_fax}}</strong>
</p><hr><strong>{{info_name}}</strong> <br />

<p style="font-size: 13px;">{{info_description}}</p><hr><p style="font-size: 13px;"><strong>{{plan_name}}</strong> ${{plan_baseprice}}</p>
{{plan_images}}

<p style="font-size: 17px; padding-bottom: 10px; border-bottom: solid 2px #000000;"><strong>Option Selected</strong></p><hr>
{{selected_options}}

<p style="font-size: 17px; border-bottom: solid 2px #000000;"><strong>General Summary</strong></p><hr>
<table>
<tr><td><strong>Plan Price:</strong></td><td>${{plan_price}}</td></tr>
<tr><td><strong>Lot Premium:</strong></td><td>${{lot_premium}}</td></tr>
<tr><td><strong>Options Total:</strong></td><td>${{options_total}} </td></tr>
<tr><td><strong>General Total:</strong></td><td>${{general_total}}</td></tr>
</table>

```

Update

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

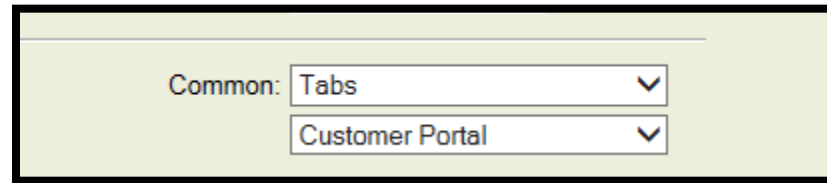


Figure 1. 32 Common Dropdown List Options

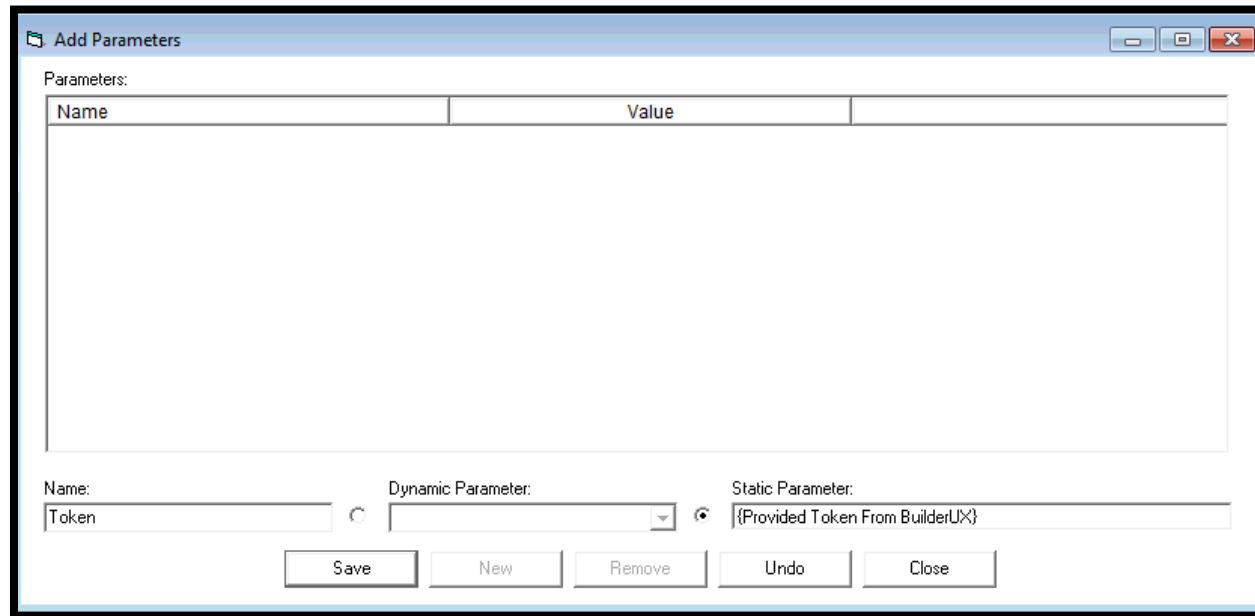


Figure 1. 33 URL(Uniform Resource Location)



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

Figure 1. 34 Adding Parameters



The "Add Parameters" dialog box contains a table with two columns: "Name" and "Value". Below the table, there are three input fields: "Name:" with the text "Token", "Dynamic Parameter:" with a dropdown arrow, and "Static Parameter:" with the text "{Provided Token From BuilderUX}". At the bottom, there are five buttons: "Save", "New", "Remove", "Undo", and "Close".

Name	Value
------	-------

Name: Dynamic Parameter: Static Parameter:

And then you must add a field called **CommunicationID** and fill that in with the Scenario Specific ID out of Sales Simplicity.

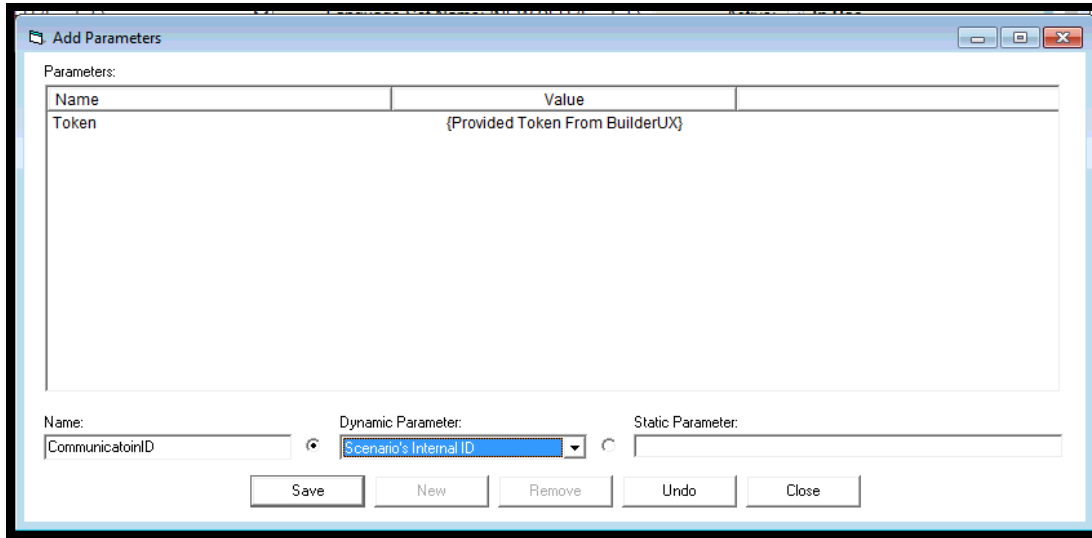


Figure 1. 35 Setting Up Dyanmic Parameter

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

