2022

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New Features

Multiselect Dropdowns

We've added the ability to select multiple options in dropdown fields (when applicable). When adding mods with a multiselect dropdown, you'll still need to make sure you put the correct modification quantity.

MultiSelect.gif

Image 1. Multiselect Dropdown being used to specify which drawer fronts are upgraded to 5-Piece.

Dropdown Choices Additional Info

Any of the room spec page dropdowns can now have a hint icon next to it, hovering over that icon will show a small popup with additional information about that choice.

image.png**Image 2.** The PRO600 Glide has the hint info icon to the right of it.

Changes & Fixes

Auto-Add Required Mods

Mods that are recommended / required will be automatically added to products when the requirements are met (for example, adding Lateral Stabilizers to drawer cabinets that are wider than 36"). When a mod is automatically added, a popup will appear to inform you which mod was added and why. You can opt out of these mods by clicking the delete mod button, the mod will be moved to the "Removed Required Mods" section. Removed mods are not included in the price and will not be included in the finished product.

AutoMod.gif

Image 3. Example of removing an auto-added required mod.

Change Product Line

The Change Product Line feature has been updated to be more user-friendly and the issue that would cause the product line conversion to fail has been fixed. Simply fix all highlighted fields, delete / replace any incompatible products / modifications then click the Convert Room button.

image.png

Image 4. Improved "Change Product Line" feature.

Bid Transfer

The bid transfer dropdown list has been reworked to be more readable and user-friendly. The list will show everyone from your dealership and from Homestead. You can filter the list by dealership by clicking on the "Filter by..." button. You can also search for the user by typing in their name or dealership.

BidTransfer.gif

Image 5. Dropdown list of available users to transfer your bid to.

Auto-Lock Hotlist Item Numbers

To avoid item numbers accidentally getting changed in hotlists, all item numbers will be locked when creating a hotlist from an existing order. This also applies to items that are moved or copied into existing hotlists. The numbers can still be unlocked and rearranged as normal.

Unsaved Changes Warning

To avoid accidentally leaving the page before saving, we've added a warning message when leaving the bid details, room specs, or product editor page. This message should only appear if there are unsaved changes on the page. Clicking the Cancel button will keep you on the current page and give you a chance to save your changes.

image.png

Image 6. Message that shows when leaving a page without saving.

Custom Tab Fixed Date Range

There is now a Fixed option for your custom tab date range. Previously, you could only have a rolling date range (for example, from a week ago to today). Selecting Fixed will allow you to have a fixed start and end date for your custom tab.

6/6/2022 - 7/20/2022

New Features

Save Incomplete Products

This new feature has been developed with the goal of speeding up the bidding process for dealers. You can now save products that don't have all of the required information filled out. For example, you won't need to provide reveals, modification colors, toe kick styles, etc. until you are going to submit the order. Some fields are still required (quantity, width, height, depth, etc.) to get an accurate price and you won't be able to save a product if any of those critical fields are invalid or missing. If a non-critical field is linked to the price of an item, the price may vary slightly when that field is filled out later on (drawer insert wood types, finished edges, etc.).

When an item is saved with missing or invalid fields, it is flagged as an incomplete item and given the status icon shown in **Image 1**. Clicking on the status icon will allow you to see which fields are invalid in the Incomplete / Invalid Fields section (**Image 2**). If there are any incomplete items in a bid and you attempt to submit the bid, you will see the notification shown in **Image 3** listing which items are invalid and which rooms they are in. Clicking on the products in the list will open them in a new tab. After saving the finished product, you can use the Refresh Items button to update the list of incomplete items.

Image 1. Incomplete product status icon.

Image 2. Product status menu showing which fields are invalid / incomplete.

Image 3. List of incomplete items by room in an order.

Disabled and Hidden Dropdown Items

Dropdown options can now be disabled and hidden programmatically. This will help us to narrow down options by removing or disabling the ones that don't work in the current product configuration. In **Image 4.** Below, it shows how options 1 and 5 are initially available, option 3 is disabled, and option 2 and 4 are hidden. In the example below, when the quantity is changed to 2, option 1 becomes disabled while option 2 is unhidden.

Image 4. Example of disabled / available dropdown and how they change with other fields.

Cloned Bids Link to Original Bid

When a bid is cloned the new bid will have an * next to its name to indicate it came from another bid. Using the bid action menu, you can open the original order. This will be useful to quickly just between Hot Lists and their original orders.

image.png

Image 5. An * is shown to the right of the bid's name to indicate it is a cloned bid.

Move / Copy Items Between Bids

An easier way to move / copy items and rooms between bids has been added! Click this link to see the full article about this new feature.

Size Restrictions

Product size restrictions are now located below the product description and update live when modifications change them. The gif below shows an example of a modification that can only be ordered in a specific width of cabinet.

SizeRestrictions.gif

Image 6. Product size restrictions will update live when modifications that override restrictions are added.

5/9/2022 - 6/6/2022

New Features

Multi-Save File Upload

When uploading files on a room or product level, you no longer need to save the room / product to upload files in multiple batches. For example, you can click browse, select two files from one folder, click browse again, and the select more files from another folder.

Convert Product Line Pricing

Live pricing is now available on the room convert page to quickly compare prices between different product lines. This allows you to compare different door styles / wood types that may not be available in your currently selected product line without cloning and converting rooms.

Bid Progress Indicators

Progress Indicators help you quickly know where you are in the confirmation processes. More detailed indicators can be seen on the bid status menu (**Image 1**) or a general progress indicator can be seen around the status icon on the bid and room lists (**Image 2**). Read this training document for more information on status icons and progress indicators.

image-1653312809127.png**Image 1.** Bid status menu display.

image-1653312889761.png

Image 2. Bid progress indicators in bid lists.

Warning Indicators for Final Approval Bids

If you save room specs or a product that has already been approved by a project manager, you will get a warning message letting you know you will have to resubmit the order and the room specs / product will need to be reapproved. This means, when an order is sent back for final approval and a change is made on your end, you will have to resubmit the order as if it was sent back with changes requested.

image-1653313650655.png

Image 3. Room specs warning message when awaiting final approval.

This only applies to bids awaiting your final approval. If you save approved room specs / products when the order has been returned to you, their status will be set to Needs Approval, but there will

be no warning message.

Tabs for Products and Rooms

Room specification and product editing pages are now broken into categorized tabs. This change should help alleviate any feelings of "information overload." This feature should also make it easier to find what you are looking for by grouping similar attributes together on the same tab. **Image 4** is an example of what the room specs page looks like with three tabs along the top (General, Doors, and Notes / Other). Notice how the Doors tab is flagged to let you know that there are errors on that tab keeping you from saving the room specs.

image-1654033318258.png

Image 4. Tabbed room specs page with three tabs and an error on the Doors tab.

Bid Review Editable Fields

Certain information can now be edited directly from the Bid Review page. This feature may rollout to other fields (like room and product information) later on. Click on the grey pencil icon or double click the field to edit them!

Edit Gif.gif

Image 5. Example of editable fields on the Bid Review page.

Dropdown Product Selection

When adding new products to a room, you can now navigate directly to the product you are looking for instead of only to its category. This should help eliminate the need to memorize which cabinets are in which category. You will still have the ability to switch between products in the same category from the product editor page as well as the ability to convert to entirely different products.

Product.gif

Image 6. Dropdown product selection from the product list page.

Product Changes

Hot List No Charge Reason

The hot list no charge reason has been changed from a short text box to a dropdown list with two options (see **Image 5**). The two options are Warranty and Reference Only (See Notes). If you need to add a description about why this product is a no charge product, leave the details in the Notes box.

> The**Reference Only** option means that the product will not be manufactured. This option is commonly selected when ordering a single piece of a cabinet such as a door or drawer box.

image-1654033685316.png

Image 7. Dropdown no charge reason for Hot List orders.

Planking Type

A dropdown list on planked panels to specify which style of planking has been added. The options are Beaded, V-Groove, and Flat. This removes the need to specify planking type in the notes box.

5/2/2022 - 5/9/2022

New Features

Mods Hidden by Default

image-1652238379814.png

Image 1. Default view of the product modification component.

The product modifications now default to a collapsed view. This will hopefully help in hiding information from view when it is not needed. You can browser modifications by category by clicking the Show Mods button, or search through the available mods using the search feature. Any modifications added to the product will still show above the search bar like before.

Product Details

image-1652242117039.png

Image 2. Product details dropdown with dropdown toggle circled.

The Product Details have been reworked to show only pertinent information for that product. This includes product attributes (including custom attributes), modifications (with their attributes), and product / revision notes when applicable. These details can be viewed by clicking on the arrow icon in the far left column of the product list table (circled in orange in **Image 2**).

Room Spec Layout

The room specifications page layout has been modified a bit to help with the feeling of too much information. The Door Options, Finish Options, and Distressing Options have been grouped into a single item on the page instead of individual items. These three will still show and hide themselves when necessary. Also, the Room Notes and Room Revision Notes have been grouped together in a single item.

Custom Tab Updates

image-1652280564021.png

Image 3. New custom tab creation layout.

Custom tabs now offer more features to help provide you with a totally customizable dashboard. The new features include:

- Table Type (your orders or dealership orders)

- Keyword Filtering
- Self Adjusting Date Rage

See this training document for a complete breakdown of the custom tab feature.

Fixes

Product List / Renumbering

Copied / deleted items should now adjust all product numbers accordingly. Copied items that match an existing item number will replace the original item. Product lists save which way they were last sorted (high to low / low to high).

Fixed "Invalid Form" Message on some Items

There was an issue on a few products where even though it looked like all the required fields were filled out, it would take you back to the product editor and a message would tell you the form was invalid. The root cause of this has been fixed and now any product that has all the required fields filled out will save correctly.

Empty Product Categories

Product categories without any products in them have been removed from the list of categories when choosing products.

Small Text on Print Outs

Fixed issue that was causing text to be too small when printing bid paperwork.

Product List Sorting Preference

Product lists now remember which direction you last sorted them in. If you prefer descending order (high to low) or ascending order (low to high), your product list should always store the last way you sorted it as your preference.

Move Products to Empty Room

Fixed issue that wouldn't let you move a product to an empty room.

Modification Changes

Max Size Attributes

A few modifications will now limit themselves based on max / min sizes. This is an ongoing change as we try to identify all of the modifications that can be automatically limited by size.

Non-Slip Mat Color

When ordering this mod, there is now a dropdown list of available colors and textures.

Appliance Opening Finished Side

You are now prompted to select which side of the cabinet the finished side goes on. Applies to all three Appliance Opening Finished Side mods.

4/25/2022 - 5/2/2022

New Features

Bid List Sorting and Searching

The default filtering for Bid Lists has been changed so that Hotlists and Sample orders no longer always show up on top of the list. Bid lists can still be filtered to exclude certain types of orders.

When using the Bid List search feature, the results will no longer contain Deleted / Archived bids unless the Deleted / Archived filters are set to on. This will help return less cluttered results when you are searching for a certain bid. The search feature will continue to ignore other filters to help reduce the need to set filters before searching.

New Product Default Handling

When adding a new product to a room, if you switch from one product to another, you will no longer get error messages for values that are no longer invalid. Values that are no longer valid for the new product will be set to that product's default value and a message will be shown below. For example, if you are adding a Filler, Overlay, Wall and switch from the default Filler, 3/4" Veneer to do so, you will no longer be required to change the width from 3" to 6", it will do so for you (see **Image 1** below).

This only applies to new products that have not yet been saved to a room. If you convert an existing product to a different product, any invalid options will show as invalid as before.

image-1651514389230.png

Image 1. Example of invalid value being changed to the default value for the new product.

New Product Line Selection Menu

When adding a new room to a bid, the Product Line selection menu has been updated to include an icon and a brief description of that product line.

image-1651514611785.png

Image 2. New layout of Product Line selection menu.

Modification Attributes

Modifications that require additional info (such as color, position, orientation, etc.) will now prompt you for that information when they are added to the product. This is an ongoing improvement, so

not all modifications currently have attributes included with them. The goal of these attributes is to help Dealers and Shop Staff know exactly what information is needed for a modification without having to remember it themselves or look it up when the modification is ordered.

When a modification is added to a product, it will popup a window if it has attributes to fill out. If a required attribute has not been filled out the modification will be turned red in the list of mods for that product. Click on the icon in the info column to see attributes / add notes to modification.

image-1651514934535.png

Image 3. What a modification will look like if there are required attributes that have not been filed out.

Custom Tabs on Dashboard

You will now be able to create custom tabs on your dashboard with filtered bid lists in them. This should allow you to quickly reference different order types / statuses without needing to filter the bid list each time. Here are a few examples of custom tabs you can create: Hot Lists, Samples, Returned Orders, Submitted Orders, etc. **Image 4** is an example of how the custom tabs appear on your Dashboard page. Go to this training document to see detailed instructions on how to save your own tabs and the new bid list filters layout.

image-1651515505751.png

Image 4. User Dashboard with two custom tabs added (Hot Lists and Samples).

Scroll to Saved Product

A feature has been added so when you save a product and are returned to the product list page (room page), the list of products will scroll down to the product that you just saved. This is helpful if you are working on a product near the bottom of a list in rooms with a lot of products.

Product Changes

L-Panel and Box Fillers

A new attribute has been added to L-Panel and Box Filler items called Return Panel Side. This attribute isn't required to save a product, unless there is a mod that makes the product nonreversible (for example, the Toe Kick Notch mod).

image-1651513733256.png	image-1651513752859.png
Image 5. Non-required Return Panel Side.	**Image 6.** Required Return Panel Side when Toe Kick Notch is added.

Solid Stock Finish and Profile Options

Solid Stock items now include check boxes for which edges and faces to finish. The front face and top long edge are checked by default. For the Solid Stock, Profile Edge item, there is also an option to profile one long edge, or both long edges.

Modification Changes

Sink Mat Color

Added a dropdown list of available sink mat colors to the Under Sink Mat modification. The list of options include: Gray-Stainless, Black-Stainless, Hard Rock Maple, White, and Silver. No more remembering to add that to the notes when ordering sink mats!

Tab Pull Options

The Tab Pull modifications now prompt you to choose a size and color from two dropdown lists.

Drawer Divider Orientation

The Drawer Divider modifications now prompt you for which direction they should go (front to back or side to side).