



HomeBuilder Release Notes

Product: HomeBuilder

Release: 5.0

Version: 1.0.2022052519.47862

Release Date: 2022-05-25

Please review the [“HomeBuilder Release Notes Testing Advisory”](#) prior to installing on your system.

Release Overview

This is a regular, scheduled Dynamics Business Central SaaS release of HomeBuilder on Microsoft AppSource. This release contains improvements and fixes, as reported in implementations and usage, by consultants and/or customers and is aggregated monthly. Details below.

To report any issue or request an enhancement in HomeBuilder or Retainage please submit an email to homebuilder@suiteengine.com.

Enhancements:

1. Field "Id" of type GUID is added to Phase, Model, Vendor Contract – in preparation for the Trade Contractor portal release.
2. In Lot Selection Choices, page for selecting Item Variant provides ability to view variant image.
3. Page “Phases”: Fact Box with the following cues is added:
 - Models
 - Phase Items
 - Vendor Contracts
 - Planning Lines
 - Work Orders
 - POEs
 - Color Selections
 - Blocks/Floors
 - Phase Tasks
4. Pages “Global Items” and “Global Item Card”: Fact Box is added with the following cues:
 - Companies Where-Used
 - Global Item Variants
 - Components
 - House Areas



5. Pages “Global Items” and “Global Item Card: Fact Box provides ability to import image for the global item. The image gets propagated to local items on running action "Push to Models".
6. Page “Global Item Variants”: Fact Box is added with ability to import an image for a global item variant. The image gets propagated to local item variants on running action "Push to Models".
7. Page “Model Items”: Fact Box is added with the following cues:
 - Variants
 - Components
 - House Areas
 - Planning Lines
 - Vendor Contracts
8. Page “Item Variants”: Fact Box is added with ability to import an image.
9. Pages “Contraction Items”, “Construction Item Card”: The following cues are added to the Fact Box:
 - Components
 - House Areas
 - Phase Items
10. Role Centers “HomeBuilder Executive”, “HomeBuilder Admin”: Cue “Phases” is added
11. Role Centers “HomeBuilder Executive”, “HomeBuilder Admin”: all cues referencing tables with Phase Code respect Default Phase Code filter set in “My HomeBuilder Settings”.
12. Page “Lot Card”: on assigning/changing Model Code, the Lot Budget gets populated/re-populated from the Model Budget.
13. Pages “Lots”, “Lot Card”: action “Posted Adjustment Entries” is added to action group “Related”. This action allows a user to view posted general journal lines for Closing Adjustment Journal. To enable this functionality, open page “General Journal Templated” and set flag “Copy to Posted Jnl. Lines” for journal “Closing Adjustment Journal”.
14. Page “Lot Selection Choices”: on choosing Item or Item Variant for a Lot Selection Choice, there is ability to open Item Card for the Item.
15. Page “Lot Selection Choices”: on choosing Item Variant for a Lot Selection Choice, there is ability to open variant options page in tile view with variant image displayed.
16. Page “Lot Installments”: column “Lot Sales Status” is added to reflect the Sales Status of the Lot.
17. Page “Lot Installments”: the following actions are added to “Related” action group:
 - Deposits



- Cash Receipt Journal
 - Posted Deposits
 - Posted General Journal (to enable this functionality, open page "General Journal Templated" and set flag "Copy to Posted Jnl. Lines" for journals "Cash Receipts" and/or "Deposits".)
18. Payment Journal: In companies having license type "Test", printing cheques is enabled only if "Document Date" is in December or January.
19. Page "HomeBuilder License Selection". The licensing model is modified in a way that it counts users specifically marked for using HomeBuilder functionality. To enable this, grid listing users is added to this page.
20. Page "HomeBuilder Setup": Action "History" is added to view the history of changes in HomeBuilder Setup (who and when made the changes).
21. Page "Lot Budget", action "Cost Detail Report" is renamed to "Cost Details (Excel)". This action is added to page "Lots" and "Lot Card".
22. Report "Cost Details (Excel) is modified in the following way:
- Report options "Date From", "Date to" are added.
 - Instead of column "Actual Amount" there are now two columns:
 - o Actual for Period (posted Amounts within "Date From", "Date To" interval)
 - o Actual to Date (posted Amounts up to "Date To")
 - Outstanding Amount is calculated based on Actual to Date
23. Permission Set "HB Basic" is added. This permission set is based on "BASIC" but it excludes sensitive finance-related table related to posting history.

Corrections:

24. Page "My HomeBuilder Settings": the Default Phase filter is stored in uppercase.
25. Page captions are corrected for the case when Homebuilder Licensing Type for the company is limiting certain actions.
26. Page "Phase Planning Lines": the default filter on Designation has been removed.
27. Page "Populate Adjustment Journal": fields "Gen. Journal Template Name", "Batch Name", "Standard Adjustment Journal" get auto populated when possible. Field "Posting Date" gets populated with the current date.
28. Pages "Global Items", "Global Item Card": action "Push to Model" shows only the Models for which the current user has read permissions.



- 29. In General Journal Lines, Purchase Lines and Sales Lines, dimensions can be used independently from custom fields "Phase Code", "Lot Code", "Cost Detail Code".
- 30. In page "Lots", the page "Lot Card" can be opened by clicking on the "Lot Code" in the list.
- 31. Bug fix: if Job is not related to a Lot (i.e., its fields "SEHB Phase Code" and "SEHB Lot Code" are empty), the posting can be done in traditional BC way using Job No, Job Task No. and (when applicable) Job Planning Line No. This applies to General Journal Lines, Purchase Lines and Sales Lines.
- 32. Bug Fix: In Purchase Lines, when "Cost Detail Code" is pre-populated from Vendor, changing the "Cost Detail Code" caused error "Insufficient memory due to recursion".
- 33. The upgrade module ensures that the functional permissions get populated.
- 34. Fixed the error on indentation of newly created Global Item Category.
- 35. Page "Lot Budget": fixed filtering on drill-down to Actual amount.

Release Objects

The following objects have been created, modified, or removed as part of this release:

Object ID	Object Name	Object Extended	Action
70526081	SEHB Phase		Modified
70526082	SEHB Model		Modified
70526092	SEHB User Settings		Modified
70526093	SEHB User License		Modified
70526103	SEHB Lot Budget Line		Modified
70526106	SEHB HomeBuilder Setup History		Modified
70526119	SEHB Vendor Contract		Modified
70526123	SEHB Model Item		Modified
70526150	SEHB Lot Installment		Modified
70526158	SEHB Choice Item Variant		Modified
70526184	SEHB Populate Adjust.Jrnl.Buff		Created
70526206	SEHB Global Cat. House Area		Modified
70526207	SEHB Global Item		Modified
70526208	SEHB Global Item Variant		Modified
70526210	SEHB Global Item House Area		Modified
70526081	SEHB Activities Cue	Activities Cue"	Modified
70526093	SEHB Lot	Job	Modified
70526107	SEHB Construction Item	Item	Modified
70526108	SEHB Item Variant	Item Variant	Modified
70526147	SEHB Gen. Journal Line	Gen. Journal Line	Modified



70526150	SEHB Posted Gen. Journal Line	Posted Gen. Journal Line	Created
70526154	SEHB Purchase Line	Purchase Line	Modified
70526168	SEHB Sales Line	Sales Line	Modified
70526075	SEHB Home Builder Setup		Modified
70526079	SEHB Cost Groups		Modified
70526080	SEHB Cost Details		Modified
70526082	SEHB Phases		Modified
70526083	SEHB Models		Modified
70526084	SEHB Model Lot Types		Modified
70526085	SEHB Model House Areas		Modified
70526090	SEHB Model Budget		Modified
70526092	SEHB Vendor Contract Revisions		Modified
70526093	SEHB Contract Revision Items		Modified
70526099	SEHB Lot Card		Modified
70526106	SEHB Lot Budget		Modified
70526128	SEHB Phase Items		Modified
70526129	SEHB Vendor Contracts		Modified
70526133	SEHB Phase Item Card		Modified
70526134	SEHB Phase Item Variants		Modified
70526135	SEHB Phase BOM Components		Modified
70526136	SEHB Model Items		Modified
70526138	SEHB Model Item Card"		Modified
70526139	SEHB Model Item Variants		Modified
70526140	SEHB Model BOM Components		Modified
70526146	SEHB Lot Planning Lines		Modified
70526151	SEHB Phase Planning Lines		Modified
70526154	SEHB License Selections		Modified
70526156	SEHB Construction Item FactBox		Modified
70526158	SEHB Vendor Lot Lines		Modified
70526160	SEHB Vendor Work Orders"		Modified
70526161	SEHB Vendor Work Order Card"		Modified
70526172	SEHB POE Card		Modified
70526177	SEHB Company List		Modified
70526178	SEHB Model Card"		Modified
70526180	SEHB Lot Selection Packages		Modified
70526183	SEHB Lot Installments		Modified
70526186	SEHB All Lots Installments		Modified
70526188	SEHB Color Selections		Modified
70526189	SEHB Selection Options		Modified
70526190	SEHB Lot Selection Choices		Modified
70526191	SEHB Define Choice Item Lookup		Modified



70526192	SEHB Define Choice Var. Lookup	Modified
70526196	SEHB Job Cost Ledger Entries	Modified
70526198	SEHB Re-allocate Costs	Modified
70526199	SEHB Package Installments	Modified
70526201	SEHB All Lot Selection Pkgs.	Modified
70526217	SEHB Model Key Dates	Modified
70526220	SEHB Lot Workflows	Modified
70526226	SEHB Package Work Planning	Modified
70526229	SEHB Adjustment Journals	Modified
70526231	SEHB Populate Adjust. Journal	Modified
70526239	SEHB Model Item House Areas	Modified
70526240	SEHB Model Item Costs	Modified
70526241	SEHB Model Item Variant Costs	Modified
70526242	SEHB Model Item BOM Comp Costs	Modified
70526255	SEHB Push Cost Details to Lots	Modified
70526260	SEHB Package POEs	Modified
70526271	SEHB Push Global WF to Lots	Modified
70526275	SEHB Global Items	Modified
70526276	SEHB Global Item Card	Modified
70526280	SEHB Global Item Variants	Modified
70526283	SEHB Global Push Items	Modified
70526287	SEHB Activities RC	Modified
70526289	SEHB Define Choice Item	Modified
70526297	SEHB Selection Package Card	Modified
70526340	SEHB User Licenses	Created
70526341	SEHB Item Variant Picture	Modified
70526342	SEHB Phase History FactBox	Created
70526343	SEHB Define Choice Variants	Created
70526344	SEHB Global Item FactBox	Modified
70526345	SEHB Global Item Picture	Modified
70526346	SEHB Global Item Var. Picture	Created
70526347	SEHB Push Cost Det. to Models	Created
70526348	SEHB Model Item FactBox	Created
70526349	SEHB HomeBuilder Setup History	Created
70526371	SEHB Inspections	Modified
70526372	SEHB Inspection Card	Modified
70526373	SEHB Inspection Checklist	Modified
70526373	SEHB Inspection Checklist	Modified
70526376	SEHB Service Issues	Modified
70526380	SEHB Inspection ServiceIssues	Modified
70526117	SEHB Item Variants	Item Variants Modified



70526155	SEHB Purchase Credit Memos	Purchase Credit Memos	Modified
70526156	SEHB Purch. Invoice Subform	Purch. Invoice Subform	Modified
70526181	SEHB Job G/L Journal	Job G/L Journal	Modified
70526183	SEHB Sales Invoice Subform	Sales Invoice Subform	Modified
70526189	SEHB Purchase Return Order	Purchase Return Order	Modified
70526190	SEHB Purchase Invoice	Purchase Invoice	Modified
70526194	SEHB Posted General Journal	Posted General Journal	Created
70526198	SEHB Purchase Order	Purchase Order	Modified
70526199	SEHB Job Journal	Job Journal	Modified
70526201	SEHB Sales Invoice	Sales Invoice	Modified
70526228	SEHB Standard GenJnl Subform	Standard Gen. Journal Subform	Modified
70526075	SEHB Upgrade		Modified
70526095	SEHB Purch. Posting Handling		Modified
70526096	SEHB Job Posting Handling		Modified
70526102	SEHB Lot Budget Management		Modified
70526104	SEHB Std Journal Handling		Modified
70526111	SEHB Lot Utils		Modified
70526115	SEHB Activities RC Mgt.		Modified
70526116	SEHB Activities RC Dictionary		Modified
70526117	SEHB Data Changing History		Modified
70526118	SEHB Stripe Integration		Modified
70526119	SEHB Stripe Metadata Mgmt		Modified
70526120	SEHB Stripe Metadata Update		Modified
70526121	SEHB Upgrade Tag Definitions		Modified
70526122	SEHB Upgrade Functional Roles		Modified
70526122	SEHB Upgrade Functional Roles		Modified
70526202	SEHB Push Global Items		Modified
70526130	SEHB Lot Cost Detail		Modified