



HomeBuilder Release Notes

Product: HomeBuilder

Release: 9.0

Version: 1.0.2022112520.63287

Release Date: 2022-11-25

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. This release introduces a more balanced approach to budgeting with the addition of the "Budget Amount" field in lot budgeting. "Budget Amount" is calculated based on "Estimated Amount" and "Planned Amount" of a Lot budget line using "Budget Amount Rule" specified in the corresponding Cost Detail record. "Budget Amount Rule" has the following options:
 - Planned|Estimated –
 - o Use Planned Amounts if they exist (the reason being is that Planned Amounts come from Vendor Contracts where estimates are just intended to be initial estimate created before quotes are obtained.
 - o The calculation is – if "Planned Amount" is not zero then "Budget Amount" is equal to "Planned Amount"; otherwise to "Estimated Amount".
 - Planned – "Budget Amount" is equal to "Planned Amount".
 - Estimated – "Budget Amount" is equal to "Estimated Amount".
 - Estimated+Planned – "Budget Amount" is equal to "Estimated Amount" + "Planned Amount".

The "Amount to Compete" gets calculated as "Budget Amount" – "Actual Amount"

2. In page "HomeBuilder Setup", two fields are added in section "Budgeting":
 - "Budget Amount Rule"
 - "Same Budget Rule for all Cost Details" (check box).

"Budget Amount Rule" specifies default value that will be assigned on creation of new Cost Detail record. When the flag "Same Budget Rule for all Cost Details" is set to 'Yes', all Cost Details are assigned with "Budget Amount Rule" specified in the HomeBuilder Setup and column "Budget Amount Rule" becomes read-only in the "Cost Details" page.



3. Column "Budget Amount Rule" is added to the page "Cost Details". It is editable if the flag "Same Budget Rule for all Cost Details" is set to 'Yes' in the HomeBuilder Setup.
4. Column "Budget Amount Rule" is added to the "Model Budget Page" as a flow-field retrieved from the corresponding Cost Detail record.
5. New columns are added to the page "Lot Budget":
 - "Budget Amount Rule" (flow-field reading from the Cost Detail record)
 - "Planned Amount" (sum of "Planned Cost Amount" and "Planned Revenue Amount")
 - Budget Amount
6. New columns are added to the page "Lot Budget Lookup" which is used on selection of "Cost Detail Code" in purchase and sales documents:
 - "Budget Amount Rule"
 - "Planned Amount"
7. New page "Budget by Lot" is added. It allows a user to view budget total amounts for each lot. The budget lines can be filtered by Cost Groups and Cost Details. The page can be called from the page "Phases" or from the general "Search".
8. Column "Budget Amount" is added to the budgeting reports:
 - Cost Detail (Excel)
 - Lot Budget Summary
 - Phase Budget
9. Column "Budget Amount" is added to section "Budgeting" in the "Lot Card".
10. New action "Calendar View" is added to the pages "Lot Workflows" and "Lot Task Operations". It allows a user to view tasks mapped on a calendar control.
11. New columns are added to the page "House Areas":
 - Applicable Items (number of Applicable Items of the House Area)
 - Applicable Checklist Items (number of the Applicable Checklist Items of the House Area)
 - Measurements (comma separated list of Measurements of the House Area)
12. Page "House Area Measurements": on deletion of a House Area Measurement, the measurement gets deleted in all Model House Areas and Lot House Areas in all companies upon confirmation by a user. On adding new House Area Measurement, the measurement gets added to all Model House Area Measurement and all Lot House Area Measurements in all companies.



13. Page "Model House Areas":

- The filter by Model Code can be removed to allow a user to view House Areas for multiple models.
- Column "Measurements" is added; this column shows comma-separated measurements with quantities which are applicable for the Model House Area.

14. Page "Model House Area Measurements": On changing Quantity, the contents get pushed to Lot House Area Measurements upon confirmation.

15. New page "Model House Area Measurements" is added. It can be open from page "Model" by action "Measurements". The filter on Model can be cleared which allows are user to view measurements for all models.

16. Page "Lot House Areas": column "Measurements" is added. This column shows comma-separated measurements with quantities which are applicable for the Model House Area.

17. Column "Current Revision No." is added to the page "Vendor Contracts".

18. Two columns are added to the page "Inspection Types":

- "Auto-populate Dates". When set to 'Yes', the fields "Date Reported", "Scheduled Date", and "Date Performed" (in the "Inspection Card") get populated with the current date upon entering the Inspection Type.
- "Auto-create Issue". When set to 'Yes', the Service Issue with Assessment 'Deficiency' gets automatically created upon changing "Outcome" of a Checklist Entry to 'Has Issues'.

19. Column "OK" is added to page "Inspection Checklist". This check box allows a user to change "Outcome" to "OK" by clicking to it, or to "Has Issues" by two clicks. This functionality is useful in the tablet and phone views.

20. Page "Checklist Issues": action "Create Work Orders" is added. This action gives a user an option to create Work Orders for Service Issues right after creating them for the Checklist Entry with "Outcome" 'Has Issues' during the inspection.

21. Page "Service Issues":

- On changing "Assessment" to 'Deficiency', the "Deficiency Type Code" gets automatically populated if the Service Issue is associated with the Checklist Entry and there is only one Deficiency Type defined for the Checklist Item.
- On changing the "Deficiency Type Code", the "Comment" gets automatically populated with Deficiency "Description" if the "Comment" is empty.

22. Two actions are added to the pages "Service Issues" and "Inspection Checklist":

- Customer Signatures (to take the signature of the customer persons and/or customer's designate)
- Inspector Signature (to take the signature of the service inspector).



23. The PDI report prints signatures of the customer, designate and décor designer if the input parameter flag "Don't Print Signatures" is set to 'No'.
24. Two actions are added to pages "Inspections" and "Inspection Card":
 - "Send by Email" (sends the report of the Inspection in PDF format to the customer's E-mail address)
 - "Sent Emails" (opens the page that lists emails sent for the Inspection)
25. Two actions are added to the page "Lot Selection Packages":
 - "Send by Email" (sends the reports "Color Chart" and "Purchaser Extras" to the customer's E-mail address)
 - "Sent Emails" (opens the page that lists emails sent for the Lot Selection Package)
26. Two actions are added to the page "Lot Selection Choices":
 - Customer Signature (to take the signature of the customer persons and/or customer's designate)
 - Designer Signature (to take the signature of the décor designer).
27. Reports "Color Chart" and "Purchaser Extras" print signatures of the customer and décor designer if the input parameter flag "Don't Print Signatures" is set to 'No'.
28. Context on-line help is added to the following pages:
 - Lot Types
 - Model Lot Types
 - House Areas
29. Action "Sent Emails" is added to pages "Work Orders", "Work Order Card", "Service Work Orders", "Service Work Order Card", "POEs", "POE Card". The action allows a user to view e-mails sent for a Work Order or POE.
30. Page "Lot Card": actions "Inspections" and "Task Operations" has become promoted to be accessible in tablet and phone views.
31. Budget Control:
 - On posting a purchase document or Job G/L Journal, the system checks if the "Actual Amount" after the posting will exceed the "Budget Amount" of the Lot Budget Line.
 - Previously, it was checking exceeding the "Estimated Amount".
 - This checking happens when the HomeBuilder Setup flag "Allow Budget Overage" is set to 'No'.
32. POE (Purchase Order for Extras) can be created not only by actions, but also from scratch using button "New" in the page "POEs".



33. Page "Inspection Checklist": When the "Outcome" of a Checklist Entry is changed from "Has Issues" to other value, the system a user to remove existing Service Issues for the Checklist Entry if they are not already a part of any Work Order.

Corrections:

- 34. In the page "Inspection Card", the field "Inspector Name" gets populated after entering "Inspector Code".
- 35. A Lot Budget Revision cannot be removed if it contains Lot Budget Lines. To remove the latest revision, use the action "Remove Latest Revision" on the "Lot Budget" page.
- 36. In page "Lot Budget", the record of Lot Budget Line can be deleted only if it is not referenced from a Lot Planning Line or Job Cost Ledge Entry.
- 37. Page "Lot Workflows": field "From Start Date" is editable when the workflow Status is "Pending" or "Open".
- 38. Page "Inspection Checklist": Fixed the order of the checklist entries for the case when the "Inspection Order" in Model House Areas is not specified.
- 39. Action "Split Costs Across Lots" in purchase documents has been updated to accommodate changes in Business Central 21.

Release Objects

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

Object Type	Object ID	Object Name	Object Extended	Action
table	70526075	SEHB Home Builder Setup		Modified
table	70526079	SEHB Cost Detail		Modified
table	70526087	SEHB House Area Measurement		Modified
table	70526088	SEHB Model HA Measurement		Modified
table	70526089	SEHB Model Budget Line		Modified
table	70526090	SEHB Lot Budget Revision		Modified
table	70526103	SEHB Lot Budget Line		Modified
table	70526106	SEHB HomeBuilder Setup History		Modified
table	70526119	SEHB Vendor Contract		Modified
table	70526127	SEHB Budget By Lot Buffer		Added
table	70526131	SEHB Job Workflow		Modified
table	70526149	SEHB Lot Selection Package		Modified
table	70526162	SEHB Lot HA Measurement		Modified
table	70526186	SEHB Lot Budget Summary Line		Modified
table	70526351	SEHB Inspection Type		Modified



table	70526358	SEHB Inspection	Modified
table	70526359	SEHB Checklist Entry	Modified
table	70526360	SEHB Service Issue	Modified
page	70526075	SEHB Home Builder Setup	Modified
page	70526076	SEHB Lot Types	Modified
page	70526078	SEHB House Areas	Modified
page	70526079	SEHB Cost Groups	Modified
page	70526080	SEHB Cost Details	Modified
page	70526082	SEHB Phases	Modified
page	70526083	SEHB Models	Modified
page	70526084	SEHB Model Lot Types	Modified
page	70526085	SEHB Model House Areas	Modified
page	70526090	SEHB Model Budget	Modified
page	70526098	SEHB Lots	Modified
page	70526099	SEHB Lot Card	Modified
page	70526102	SEHB Lot House Areas	Modified
page	70526106	SEHB Lot Budget	Modified
page	70526108	SEHB Lot Budget Summary	Modified
page	70526109	SEHB Lot Budget Total	Modified
page	70526112	SEHB Lot Budget Lookup	Modified
page	70526129	SEHB Vendor Contracts	Modified
page	70526160	SEHB Vendor Work Orders	Modified
page	70526161	SEHB Vendor Work Order Card	Modified
page	70526171	SEHB POEs	Modified
page	70526172	SEHB POE Card	Modified
page	70526180	SEHB Lot Selection Packages	Modified
page	70526190	SEHB Lot Selection Choices	Modified
page	70526201	SEHB All Lot Selection Pkgs.	Modified
page	70526220	SEHB Lot Workflows	Modified
page	70526228	SEHB Lot Budget Line History	Modified
page	70526288	SEHB Planned Amount Lines	Modified
page	70526297	SEHB Selection Package Card	Modified
page	70526349	SEHB HomeBuilder Setup History	Modified
page	70526359	SEHB Lot History FactBox	Modified
page	70526363	SEHB Inspection Types	Modified
page	70526371	SEHB Inspections	Modified
page	70526372	SEHB Inspection Card	Modified
page	70526373	SEHB Inspection Checklist	Modified
page	70526374	SEHB Add Checklist Entry	Modified



page	70526376	SEHB Service Issues	Modified
page	70526380	SEHB Inspection Servicelssues	Modified
page	70526382	SEHB Checklist Issues List	Modified
page	70526520	SEHB Lot Task Operations	Modified
page	70526527	SEHB Split Costs Across Lots	Modified
page	70526531	SEHB Customer Signature Select	Added
page	70526532	SEHB Designer Signature Select	Added
page	70526533	SEHB Design Sign FB Selection	Added
page	70526534	SEHB Cust Sign FB Selection	Added
page	70526535	SEHB Customer Signature Inspec	Added
page	70526536	SEHB Cust Sign FB Inspection	Added
page	70526537	SEHB Inspec Signature Inspec	Added
page	70526538	SEHB Inspec Sign FB Inspection	Added
page	70526539	SEHB Calendar Tasks	Modified
page	70526540	SEHB Model HA Measurements All	Modified
page	70526541	SEHB Budget By Lot	Added
page	70526542	SEHB Budget By Lot Sub	Added
codeunit	70526075	SEHB Upgrade	Modified
codeunit	70526078	SEHB Install	Modified
codeunit	70526082	SEHB Intercompany Copy Utils	Modified
codeunit	70526091	SEHB Gen-Jnl Handling	Modified
codeunit	70526095	SEHB Purch. Posting Handling	Modified
codeunit	70526102	SEHB Lot Budget Management	Modified
codeunit	70526107	SEHB Send Email Documents	Modified
codeunit	70526121	SEHB Upgrade Tag Definitions	Modified
codeunit	70526346	SEHB Aftersales Management	Modified
report	70526080	SEHB Global Closing Dates	Modified
report	70526081	SEHB Phase Budget	Modified
report	70526087	SEHB Lot Cost Summary	Modified
report	70526115	SEHB Color Chart	Modified
report	70526116	SEHB Purchaser Extra	Modified
report	70526130	SEHB Lot Cost Detail	Modified
report	70526344	SEHB PDI	Modified
report	70526345	SEHB General Inspection	Modified