



# HomeBuilder Release Notes

**Product:** HomeBuilder

**Release:** 10.0

**Version:** 1.0.2023011620.68085

**Release Date:** 2023-01-16

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](mailto:homebuilder@suiteengine.com).

## Enhancements:

1. This release introduces a concept of Payment Splits to simplify the processing of partial payments. The parts of a Payment Split can be expressed in percent values or in absolute amounts. The Payment Splits can be assigned to Contract Revision Items. As a result, the system generates multiple planning lines for the same item (one for each part of the split) upon action "Site Model on Lot" or upon action "Release" (in Lot Selection Packages).

Page "Payment Splits" allows a user to define different Payment Splits as templates. This page can be opened from the main menu [HomeBuilder](#) → [Setup](#) of the role centers "HomeBuilder Admin" and "HomeBuilder Executive".

2. Page "Contract Revision Items":
  - New columns "Payment Split Code", "Split By", "Number of Payment", "Sum of Split Percent", "Sum of Split Amounts" are added. Upon entering "Payment Split Code", the parameters of the split get populated from the Payment Split defined in the setup.
  - Action "Payment Split" is added. This action opens page "Contract Item Payment Split" which allows a user to re-define payment split parameters and to define amounts for the case when the payment split is to be done by amount.
3. Pages "Lot Selection Choices" and "Choice Components": new column "Unit Cost Override" is added to allow a user to override "Unit Cost" populated from the Model Item. If the "Unit Cost Override" is not zero it will be used for populating Planning Line (or multiple Planning Lines in case of a payment split) instead of "Unit Cost".

Editing "Unit Cost Override" is allowed if a user has the functional permission "CAN UPDATE SELECTION COSTS".



4. Page "Vendor Contracts"
  - Action "Latest Revision Items" is renamed to "Current Prices"
  - When a user adds a contract then the first revision gets created upon entering "Contract Date" with the confirmation message displayed.
  - Cue "Job Cost Ledger Entries" is added.
5. Page "Report Selections – HomeBuilder" is added to allow a user to setup Report ID for printing HomeBuilder documents. The report selections for HomeBuilder provide the following "Usage" options:
  - Construction Work Order
  - Service Work Order
  - Purchase Order for Extras
  - Purchase Order for Extras No Costs
  - Pre-delivery Inspection
  - General Inspection
  - Color Chart
  - Purchaser Extras
6. Page "Inspection Types": column "Report ID" is replaced with column "Report Usage" which is to be used to determining Report Id in "Report Selections".
7. Pages "Inspections" and "Inspection Card": Inspection Status "Released" as well as actions "Release" and "Un-release" have been deprecated.
8. Page "Checklist Issues":
  - Action "Work Order Card" is added.
  - On changing Assessment from "Deficiency" to other value, the Deficiency Type gets cleared.
9. Page "Inspection Service Issues": a user can change "Vendor No." and "Vendor Contract No." as far as a Work Order is not created for the Service Issue.
10. Pages "Purchase Invoice" and "Purchase Order": when a Purchase Line is referencing a job planning line, reducing "Direct Unit Cost" happens upon confirmation by a user. This is done to prevent the misuse of "Direct Unit Cost" for the purpose of partial payments.
11. Pages "Purchase Invoice", "Purchase Order", "Purchase Credit Memo", "Purchase Return Order":
  - New check box "Apply to Planning Line" is added to purchase lines. When a user checks this field the system tries to find the first Planning Line which satisfies the criteria imposed by the purchase line and populates field "Job Planning Lines No." with the "Line No." of found Planning Line. The search criteria are "Type", "No.", "Job No.", "Job Task No." and "Quantity" less than "Remaining Qty." of a Planning Line.
  - Filed "Job Planning Line No." provides a lookup to Job Planning Lines which satisfy the same criteria.



12. Page "Workflow Template Tasks": new column "Predecessors" is added. The column displays the task-predecessors in comma-separated list.
13. Role Centers "HomeBuilder Admin" and "HomeBuilder Executive": cue "Construction Workflow Templates is added for better navigation.
14. Page "HomeBuilder License Selections":
  - Action "All Users History" is added to provide ability to view the history of changes in users' licensing. This action opens the page "HomeBuilder User History".
  - Columns "Last Change Date/Time" and "Last Change User Id" are added to the grid "HomeBuilder User Licenses".
15. Page "Model Budget": ability to remove filters by Phase and Model.
16. Page "Model Items": ability to remove filters by Phase and Model.
17. Page "Model Item Applicable House Areas": ability to remove filters by Phase, Model, and Item.
18. Reports "Color Chart" and "Purchaser Extras": the date of signatures in the reports are taken from the signature dates captured at the time of signing.
19. The report "General Inspection" for non-PDI inspections is re-designed to be based on Service Issues.
20. HomeBuilder educational videos are added to the "Videos" control of role centers. More videos are to come!
21. Online help is added for the following pages:
  - Purchase Invoice
  - Purchase Invoices
  - Purchase Order
  - Purchase Order List
  - Vendor Progress Bills
  - Vendor Progress Bill Card

## Corrections:

22. The page "Lot Applicable Models" has been deprecated.
23. Page "Lines to Purchase Document":
  - On changing "Qty. to Invoice" the field "Amount to Invoice" gets re-calculated.
  - Columns "Qty. to Invoice" and "Amount to Invoice" are moved to the left for better visibility

This page is called by action "Populate from Planning Lines" in purchase documents.



- 24. Page "Split Costs Across Lots": fixed the issue with rounding Quantity to whole values. This page is called from pages "Purchase Invoice" and "Purchase Order".
- 25. On creating Work Orders for a task, the system correctly fills the "Status" and "Phase Code" in Work Order Lines, the Work Order "Due Date" is assigned with the current date.
- 26. Page "Vendor Contracts": ability to add new Vendor Contract if the page is called from a Role Center or from the Search.
- 27. Page "Inspection Service Issues": fields "Vendor No." and "Vendor Contract No." are not editable if the Assessment is other than 'Deficiency'.
- 28. Bug fix: On posting purchase credit memo, the system updates "Purchase Document No." in the Job Planning Line when the purchase line references it.
- 29. Bug fix: The system correctly populates custom HomeBuilder fields in Job Planning Lines created on posting a purchase document. The creation of Job Planning Line happens when a purchase line has "Job Planning Line No." empty, "Job Line Type" is either 'Budget' or 'Budget and Billable', and the system cannot link the purchase line to an existing Job Planning Line.

## 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	70526083	SEHB Model Lot Type		Modified
table	70526093	SEHB User License		Modified
table	70526097	SEHB Lot Applicable Model		Obsolete
table	70526105	SEHB Contract Revision Item		Modified
table	70526113	SEHB Payment Split		Created
table	70526114	SEHB Payment Split Line		Created
table	70526119	SEHB Vendor Contract		Modified
table	70526128	SEHB CI Payment Split Line		Created
table	70526129	SEHB User License Entry		Created
table	70526138	SEHB Vendor Work Order		Modified
table	70526141	SEHB POE Header		Modified
table	70526149	SEHB Lot Selection Package		Modified
table	70526156	SEHB Lot Selection Choice		Modified
table	70526163	SEHB Lot Choice Component		Modified
table	70526351	SEHB Inspection Type		Modified
table	70526358	SEHB Inspection		Modified



table	70526359	SEHB Checklist Entry		Modified
table	70526360	SEHB Service Issue		Modified
tableextension	70526081	SEHB Activities Cue	Activities Cue	Modified
tableextension	70526093	SEHB Lot	Job	Modified
tableextension	70526130	SEHB Job Planning Line	Job Planning Line	Modified
tableextension	70526154	SEHB Purchase Line	Purchase Line	Modified
tableextension	70526155	SEHB Job Ledger Entry	Job Ledger Entry	Modified
tableextension	70526159	SEHB Job Journal Line	Job Journal Line	Modified
page	70526084	SEHB Model Lot Types		Modified
page	70526090	SEHB Model Budget		Modified
page	70526094	SEHB Create New Revision		Modified
page	70526101	SEHB Lot Applicable Models		Obsolete
page	70526123	SEHB Task Planning Lines		Modified
page	70526125	SEHB WF Template Tasks		Modified
page	70526129	SEHB Vendor Contracts		Modified
page	70526136	SEHB Model Items		Modified
page	70526148	SEHB Add Planning Item		Modified
page	70526154	SEHB License Selections		Modified
page	70526166	SEHB Vendor Progress Bills		Modified
page	70526167	SEHB Vendor Progress Bill Card		Modified
page	70526180	SEHB Lot Selection Packages		Modified
page	70526190	SEHB Lot Selection Choices		Modified
page	70526195	SEHB Lines to Purch. Document		Modified
page	70526201	SEHB All Lot Selection Pkgs.		Modified
page	70526210	SEHB Homebuilder Executive RC		Modified
page	70526225	SEHB Lot Choice Components		Modified
page	70526232	SEHB Homebuilder Admin RC		Modified
page	70526239	SEHB Model Item House Areas		Modified
page	70526287	SEHB Activities RC		Modified
page	70526291	SEHB Vendor Contract FactBox		Modified
page	70526298	SEHB Selection Choices All		Modified
page	70526340	SEHB User Licenses		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	70526375	SEHB Checklist Issues		Modified
page	70526376	SEHB Service Issues		Modified



page	70526377	SEHB Service Issue Card		Modified
page	70526380	SEHB Inspection Servicelssues		Modified
page	70526382	SEHB Checklist Issues List		Modified
page	70526527	SEHB Split Costs Across Lots		Modified
page	70526531	SEHB Customer Signature Select		Modified
page	70526532	SEHB Designer Signature Select		Modified
page	70526537	SEHB Inspec Signature Inspec		Modified
page	70526543	SEHB CI Payment Split		Modified
page	70526544	SEHB CI Payment Split Lines		Modified
page	70526545	SEHB Payment Splits		Created
page	70526546	SEHB Payment Split Lines		Created
page	70526547	SEHB Report Selection - HB		Modified
page	70526548	SEHB User History		Created
page	70526549	SEHB Job Planning Line Lookup		Created
pageextension	70526156	SEHB Purch. Invoice Subform	Purch. Invoice Subform	Modified
pageextension	70526157	SEHB Purchase Order Subform	Purchase Order Subform	Modified
pageextension	70526158	SEHB Purch. Cr. Memo Subform	Purch. Cr. Memo Subform	Modified
pageextension	70526161	SEHB Purch. Ret. Order Subform	Purchase Return Order Subform	Modified
pageextension	70526175	SEHB Purchase Invoices	Purchase Invoices	Modified
pageextension	70526177	SEHB Purchase Order List	Purchase Order List	Modified
pageextension	70526190	SEHB Purchase Invoice	Purchase Invoice	Modified
pageextension	70526198	SEHB Purchase Order	Purchase Order	Modified
codeunit	70526075	SEHB Upgrade		Modified
codeunit	70526076	SEHB Common Utils		Modified
codeunit	70526078	SEHB Install		Modified
codeunit	70526083	SEHB Job Planning Utils		Modified
codeunit	70526084	SEHB Vendor Contract Utils		Modified
codeunit	70526093	SEHB Selection Management		Modified
codeunit	70526095	SEHB Purch. Posting Handling		Modified
codeunit	70526096	SEHB Job Posting Handling		Modified
codeunit	70526105	SEHB Print Documents		Modified
codeunit	70526107	SEHB Send Email Documents		Modified
codeunit	70526110	SEHB Vendor WO Utils		Modified
codeunit	70526115	SEHB Activities RC Mgt.		Modified
codeunit	70526116	SEHB Activities RC Dictionary		Modified
codeunit	70526117	SEHB Data Changing History		Modified
codeunit	70526118	SEHB Stripe Integration		Modified
codeunit	70526121	SEHB Upgrade Tag Definitions		Modified
codeunit	70526122	SEHB Upgrade Functional Roles		Modified



codeunit	70526128	SEHB Video	Created
codeunit	70526346	SEHB Aftersales Management	Modified
report	70526083	SEHB POE No Costs	Modified
report	70526105	SEHB Vendor Work Order	Modified
report	70526106	SEHB POE	Modified
report	70526115	SEHB Color Chart	Modified
report	70526116	SEHB Purchaser Extra	Modified
report	70526344	SEHB PDI	Modified
report	70526345	SEHB General Inspection	Modified
report	70526346	SEHB AS Vendor Work Order	Modified