



HomeBuilder Release Notes

Product: HomeBuilder

Release: 17.0

Version: 22.2.20230629.88859

Release Date: 2023-06-28

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. Comments on the Item Worksheet Template:

- a. One of the most significant aspects of implementation setup is the Item list. The Item lists directly impact how you use the system from the setup day forward.
- b. The list of Items that you will create changes based upon the usage the Item, Base Contract Items are generally simpler and often have a one-to-one relationship with most of the setup tables. Selections Items are often categorized by type e.g., cabinets are set up one way and flooring another.
- c. Having a simple view of Items without being forced to comply with all the controls of an ERP system is helpful in setup.
- d. The setup of Items is made particularly complicated because all the ancillary tables that support items must be setup (in the base Dynamics BC system) prior to creating Items. People most commonly think of the Item first and the classifications (created by the ancillary tables) second.
- e. The introduction of the Item Worksheet Templates helps improve the user experience for all these topics.

2. Details on the new functionality of Item Worksheets

- A user can edit a list of Items or Items + Variants.
- When creating the Item Worksheet Template you will need to specify which columns you want in the Worksheet. This flexibility creates a little extra work to start but it is necessary to allow each group of items to have their own Template setup.
- The Item Worksheet Template allows to set the flag for automated copying Item No. to Task No. or to Cost Detail Code.
- A user can create Item Worksheet Batches (individual worksheets) for each Item Worksheet Template. This allows the user to work from the same template layout but e.g., have a batch for hardwood and another for carpet.

- A user can build the Worksheet with existing Items, import from Excel or just start typing to create new ones.
 - On entering No. of existing Item into Item Worksheet Line, the line gets populated with Item values.
 - On entering Item Template Code into Item Worksheet Line, the line gets populated with Item Template values.
 - A user can export a worksheet into Excel, work on the list of items in the Excel worksheet and then import it back.
 - When a worksheet is ready, you will “apply” the worksheet to Items and the Item and any related tables will be populated with these new values. If you think you made a mistake, just recreate the worksheet from the newly created items, adjust and “apply” to items again.
3. To improve visibility of date and not force the user to jump out of the Model Budget page to find the related information, the following fields are added to the page "Model Budget" as flow fields with values from the underlying tables: "Model Item Amount", "Planned Cost Amount", "Planned Revenue Amount", "Planned Amount", "Actual Amount".
 4. The field "Model Code" is added to Job Cost Ledger Entry. The field gets populated on posting.
 5. The field "Check No. Prefix" is added to the "Bank Account Card". The prefix gets printed in front of the "Cheque No." on all custom cheques.
 6. Actions "Print Selections" and "Print Extras" are added to the page "Lot Selection Choices".
 7. Menu item "Item Worksheet Templates" is added to the role centers "HomeBuilder Executive" and "HomeBuilder Admin".
 8. The following Queries were added to be accessible from *Power BI*:
 - Models
 - Model Budget
 - Model House Areas
 - Model Items
 - Lots
 - Lot Tasks

Corrections:

9. License limitations are added to pages "Construction Item Templates" and "Construction Item Template Card".
10. On changing Designation in Construction Item, Global Item or Construction Item Template: If Designation is not "Customer Fee" and Color Chart is set to 'No' then the "Revenue Detail Code" gets cleared.
11. In Planning Lines, Quantity can be changed even if the Planning Line is release for POE.
12. Action "Push to Models" in page "Construction Items": "Default Vendor No." and "Default Contract No." get assigned to Model Item Variant if they are not already assigned.



- 13. In the page "Lot Selection Packages", actions "Print Selections" and "Print Extras" got promoted (visible in the menu ribbon).
- 14. On renaming a Phase, the associated Dimension Value gets renamed as well.
- 15. Page "Lot Budget":
 - On changing "Estimated Amount", the Comment for the previous change gets erased.
 - On creating Lot Budget Entry, the "Date Modified" gets assigned with today date.
- 16. Bug Fix: On updating "Unit Cost" for in "credit" Phase Item, "Phase Item Variant", "Model Item", or "Model Item Variant", the sign in the corresponding Contract Revision Item stays negative.
- 17. Bug Fix: On running actions "Update Items" and "Update Global Items", the sing in "credit" Construction Items and Global Items stays positive.
- 18. Bug Fix: On creating new Contract Revision, the sign for "Unit Cost" in Contract Revision Items for "credit" Phase Item Variants and Model Item Variants stays negative.

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	70526089	SEHB Model Budget Line		Modified
table	70526103	SEHB Lot Budget Line		Modified
table	70526115	SEHB WF Template		Modified
table	70526120	SEHB Phase Item		Modified
table	70526121	SEHB Phase Item Variant		Modified
table	70526123	SEHB Model Item		Modified
table	70526124	SEHB Model Item Variant		Modified
table	70526145	SEHB Item Worksheet Template		Modified
table	70526153	SEHB Tax Buffer		Modified
table	70526160	EHB Job Cost Ledger Entry		Modified
table	70526180	SEHB Item Worksheet Batch		Modified
table	70526181	SEHB Item Worksheet Line		Modified
table	70526183	SEHB Diary Entry		Created
table	70526194	SEHB Diary Entry Lot		Created
table	70526195	SEHB Diary Entry Media Set		Created
table	70526207	SEHB Global Item		Modified
tableextension	70526076	SEHB Bank Account	Bank Account	Modified



tableextension	70526083	SEHB Construction Item Templ.	Item Templ.	Modified
tableextension	70526107	SEHB Construction Item	Item Variant	Modified
tableextension	70526108	SEHB Item Variant	Item Variant	Modified
tableextension	70526130	SEHB Job Planning Line	Job Planning Line	Modified
page	70526075	SEHB Upgrade		Modified
page	70526090	SEHB Model Budget		Modified
page	70526093	SEHB Contract Revision Items		Modified
page	70526096	SEHB Job Posting Handling		Modified
page	70526121	SEHB Upgrade Tag Definitions		Modified
page	70526134	SEHB Phase Item Variants		Modified
page	70526139	SEHB Model Item Variants		Modified
page	70526180	SEHB Lot Selection Packages		Modified
page	70526190	SEHB Lot Selection Choices		Modified
page	70526196	SEHB Job Cost Ledger Entries		Modified
page	70526201	SEHB All Lot Selection Pkgs.		Modified
page	70526210	SEHB Homebuilder Executive RC		Modified
page	70526232	SEHB Homebuilder Admin RC		Modified
page	70526385	SEHB Constr. Item Templates		Modified
page	70526386	SEHB Constr. Item Templ. Card		Modified
page	70526388	SEHB Item Worksheet Templates		Modified
page	70526389	SEHB Item Worksheet Templ Card		Modified
page	70526390	SEHB Item Worksheet Batches		Modified
page	70526391	SEHB Item Worksheet		Modified
page	70526392	SEHB Add Items to Worksheet		Modified
page	70526556	SEHB Portal Settings		Modified
pageextension	70526075	SEHB Bank Account Card	Bank Account Card	Modified
codeunit	70526076	SEHB Common Utils		Modified
codeunit	70526077	SEHB Data Deletion Mgmt		Modified
codeunit	70526079	SEHB Dimension Utils		Modified
codeunit	70526084	SEHB Vendor Contract Utils		Modified
codeunit	70526085	SEHB Excel Utils		Modified
codeunit	70526092	SEHB Tax Calculate		Modified
codeunit	70526096	SEHB Job Posting Handling		Modified
codeunit	70526103	SEHB Singleton		Modified
codeunit	70526108	SEHB Push Items		Modified
codeunit	70526123	SEHB Upgrade Permission Sets		Modified
codeunit	70526131	SEHB Workflow Template Utils		Modified
codeunit	70526134	SEHB Portal WS Mgmt		Modified
codeunit	70526137	SEHB Item Template Utils		Modified



codeunit	70526138	SEHB Item Worksheet Utils	Modified
codeunit	70526139	SEHB Item Worksheet Applying	Modified
codeunit	70526140	SEHB Azure Blob Storage"	Modified
codeunit	70526200	SEHB Global Item Cat. Mgmt	Modified
report	70526075	SEHB Check (Stub/Stub/Check)	Modified
query	70526075	SEHB Models API	Created
query	70526076	SEHB Model Items API	Created
query	70526077	SEHB Model House Areas API	Created
query	70526078	SEHB Model Budget API	Created
query	70526079	SEHB Lot Tasks API	Created
query	70526080	SEHB Lots API	Created
report	70526084	SEHB Check (Check/Stub/Stub)	Modified
report	70526088	SEHB Check (Stb/Stb/Chk-Plain)	Modified
report	70526089	SEHB Check (Chk/Stb/Stb-Plain)	Modified