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SALES SIMPLICITY

Sales Simplicity X Release Notes – Version 20.0

Original Release Date – April 2020

All new features included in this release are referring to Sales Simplicity X. If you are still accessing Sales Simplicity via the Legacy application, please note that Legacy no longer receives any updates and support for the Legacy system is being phased out. Some of these new features only apply to our Subscription users, which are all listed under the separate "Subscription Environments Only" category. Please contact the Professional Services Training Department at account@salessimplicity.com for additional information or training on the functionality of these new features, or for information about switching to Subscription. If you are unable to see any newly added tab, make sure they are turned on in your User Settings and that you and your users have access to it. Bug fixes that were resolved in this release will be marked in the Support tickets that have been submitted and may not be included in this release notes document.

Updates to SS – Sorted by Section

Password Security

Password security for Sales Simplicity has increased. Upon your first login after the 20.0 release, you will be prompted to change your password if you do not meet the new password requirements. Passwords now require the following:

- Minimum password length 8 digits
- Must contain both letters and numbers
- Must contain both uppercase and lowercase characters
- Optional use of a selection of special characters (!"#$%&'()*+,-./:;<=>?@[\]^_`{|}~)
- Case Sensitivity is now always enforced

The **Forgot Password process** has also been updated to require username AND email prior to submitting a "forgot password" request for security purposes.

Builder

Builder>Users – User-specific workflow notifications have a button to check bounce history. This was not editable to be renamed previously but has been changed to be editable by administrators.

Builder>Users – When making changes to User Permissions with dependencies (ex. – Can View Other Users Customers), an error would occur with a message that stated, "Maximum Call Stack Size Exceeded". This has been resolved.

Builder>Users – When creating a new user type from the "Leave Blank" option, permissions were being pre-selected. This has been resolved to prevent permissions from being pre-selected when creating a user type from "Leave Blank".

Builder>Users – When creating a user type, the screen would not update to the "Description" portion if "New" was selected on a different portion of User Types. This has been resolved to switch to "Description" when a new user type is being created.

Builder>Users – When creating a new user, selecting "No User Type" in the User Type dropdown resulted in an error code. This has been resolved to not display the error message.

Builder>Users – When setting up Email Integration Settings for a user, "Save and Validate Settings" was not triggering the validation. This has been resolved to set the Valid flag if the settings are correct.

Builder>Users – When selecting a User Type, inherited permissions were displaying as false incorrectly. This has been resolved so inherited permissions display the correct setting/color.

Builder>Field Labels – Saving a new dropdown answer keeps the item selected and in edit mode (description field still populated). In both saving a new and saving changes to an existing answer, the table will now scroll to the selected item

Builder>Field Labels – An extra "Close" button was removed from a Custom Parameter popup designated for creating custom tabs in Sales Simplicity.

Builder>Field Labels – Occasionally, the default language set would appear blank on this page. This has been resolved and now will load Language Sets.

Division

Division>Option Rules – Export from Grid was not working on this table. This has been resolved so Export from Grid works on Division>Option Rules.

Division>Option Rules - When using the Wildcard function along with "is exclusive", the rule was not working as you are still able to select multiple options. This has been resolved to

Division>Realtor - The "Show Inactive" button was missing. This has been resolved by reading the "Show Inactive" button to the page.

Subdivision

Subdivision>Setup - Permissions that are selectable at both the user and subdivision level were not working together. Permissions selected in Subdivision>Settings were overriding user-based permissions.

Subdivision>Setup>User List – "Select All" checkbox was not working; issue has been resolved to allow "Select All" to work as intended.

Subdivision>Topo Admin – The "Default" lot status icon buttons have added descriptors to indicate that these icons will cascade to phases in the subdivision.

Subdivision>Topo Admin – Previously, if you change any of the topo icons in any phase under a Subdivision, all phases (as well as the Subdivision icon) change icons. Now, you can change the icon image for each Phase under a Subdivision so it is unique.

Subdivision>Topo Admin - The Topo Admin does not display the correct Icons despite them being correct in the database and the query correctly pulls them when the page loads. The Topo Admin screen now properly displays the Icons for the designated lot statuses

Subdivision>Plan Options – When using the Export to Grid feature, not all values and items were displaying their data, but were displaying HTML. This has been resolved to not display HTML.

Subdivision>Plan Options – When switching a plan option to be active, the table was not saving changes. This has been fixed.

Subdivision>Floor Plans, Subdivision>Topo Admin, Subdivision>Phases – When the "Show Inactive" button was set to "Invisible", some inactive items would not display. This has been resolved by allowing the "Show Inactive" button to be invisible without hiding any inactive items.

Customer

Customer Search Popup – Searching for a specific client with an email address or specific customer address was not populating all results. This has been resolved to show all results in the search.

Customer>Buyer (Actions Bar) – Copying a cancelled scenario is copying the cancellation status and cancellation reason, which is not the expected behavior. This has been fixed to not copy the cancellation status and reason during the "copy scenario" action.

Customer>Buyer – When saving a new client record, saving the profile with a blank Sales Agent selection was not displaying the agent that created the record until the page was refreshed. This process was updated to display the agent who created the record upon save.

Customer>Buyer and Customer>CoBuyer – Multiple fields were not reverting to their previous state when the "Undo" button was selected. This was resolved to ensure all fields are reverting to their previous state when the "Undo" button has been selected.

Customer>Total Price Breakdown – Total Price Breakdown (TPB) was changing the Cash Option price when changing between the Buyer screen and the Options screen. This has been resolved to prevent the cash option price from incorrectly changing.

Customer>Attachments – Adding or removing attachments was not forcing the Attachments icon to change to the correct color. This has been fixed to allow the Attachments icon to change color if attachments are added to the customer.

Customer>Lots and Spec Homes>Lots - Builder approval and quote completed on options are now removed when moving a prospect from one lot to another.

Customer->Lots and Plans – Fields are not properly being copied to tbClient when selecting a Spec on a Customer.

Customer>Lots and Plans – Making a reservation on a lot that has no floor plan selected caused an error code to display. This has been resolved to allow a reservation without a plan selection.

Customer>Lots and Plans – After selecting to clear custom options, a message to clear approvals on custom options still appears. This has been resolved to prevent the error from appearing when custom options are cleared.

Customer>Options – When adding an option with a quantity over 1000, the displayed extended price was displaying as NaN (not a number). This has been resolved to display the extended price.

Customer>Options – Using "Approve All" for all options without having anything selected in the Selected Options table was causing an error code to appear. This has been resolved by fixing the button and table, which prevents the error code from appearing.

Customer>Options – Attributes for selected options were not being saved. This has been resolved, which allows attribute selections to be saved.

Customer>Options – Selecting an option with attributes can generate a 404 error when trying to load an image for the option/attribute from the attachments folder. This has been resolved, resulting in images properly loading from the attachment folder and the 404 error no longer being displayed.

Customer>Mortgage – (Subscription Only) After selecting a Loan Officer, saving the changes, and hitting refresh on the web browser, all loans were showing in the Loan table instead of the filtered list that applied to the loan officer selected. This has been resolved to only display loans that are tied to the selected loan officer.

Customer>Contract – The Margin and Markup numbers can now be hidden using the FLI Edit Mode.

Customer>Contract – The User permission "Can Accept Offers" will now be needed to "analyze" a counteroffer deal. The thought process of this is if you cannot accept an offer, you do need to be able to see the margin/details of the deal. If you need to turn this permission on, you will find it in Builder>Users>Permissions>Customer Permissions.

Follow Up

Loading times for the Follow Up > To Do Suite tab have been lowered. A spinner icon will display during that load time.

Tasks that require contact information not present on a client's record will be displayed in red text. (Ex. – Phone call task with no phone number)

Follow Up > Wonderwall produced 404 errors. This has been resolved.

Completing tasks in an individual customer's Follow Up screen resulted in error codes that prevent task completion. These errors have been resolved.

Alert messages confirming the completion of one task have been removed. Alerts will remain if completing more than one task at a time.

Merge fields in email tasks were not filling in data from the client profile. This has been resolved to ensure merge fields are being filled in with the correct data.

Follow Up>Customer Marketing – Marketing messages sent to realtors from the Customer Marketing section were not displaying in Email Stats. This has been resolved to make sure marketing emails to realtors display in Email Stats.

Spec Homes

Using **"Select All Standard"** for options was not selecting all standard options, creating an error of "This Phase does not allow options to be added".

Option attributes were not being displayed in the proper order when user would click on the option attribute icon (green, yellow, or red). Sequencing has been fixed to match the option attribute sequencing

Excel Imports for updating Spec Home lots are now working and following all rules that Spec Home lots must follow.

Spec>Options AND Customer>Options – A popup now displays when Custom Options are not approved when using the "Approve All" button.

DocuSign

When sending an envelope to DocuSign, signing on a different device and clicking "Send to DocuSign" sometimes resulted in a blank popup. This has been resolved to prevent a blank popup from being displayed.

External Sites – eLead Admin, Excel, Customer Portal, and Email Creation Utility

eLead Admin logins were failing. This has been resolved to prevent login failures.

In the **Customer Portal**, the "Get Warranty Info" page was not loading. This has been resolved.

Plans and Options (Beta)

PDF attachments were not displaying correctly when viewing an option added to a home. This has been resolved so all PDF attachments will load.

When **adding options**, upon clicking Save, the user gets an error "-2: Column 'OptionDesc' does not allow DBNullValue". While the options did save, the error would continue to appear. This has been resolved. The best practice for this is to enter a description for the custom option, but if this is skipped, then the save should proceed without the error code. Instead, the user will get a popup stating that they should correct the data.

Plans and Options **was not loading** on some sites when using Chrome. This has been resolved.

Unexpected characters were appearing in the AccountingCodeDerived values instead of the mask values. The correct values will now be displayed.

The popup that lists options excluded by lot and plan has been updated.

Control Center (Subscription)

Control Center various bug fixes

Various System Updates

Copyright Information has been added into Sales Simplicity.

All Workflow screens (Builder, Division, Subdivision, and User-Specific Workflows)– Merge fields were updated to pull from their assigned Data Source instead of the TTX method

Miscellaneous

A variety of minor fixes are included in this release. If you have opened a ticket reporting an issue that has been fixed in this update, you will be notified in the ticket. If you have any questions regarding the changes, or any other questions about using or setting up Sales Simplicity, please contact account@salessimplicity.com