MiTek® SALES SIMPLICITY

Sales Simplicity X Release Notes – Version 22.0

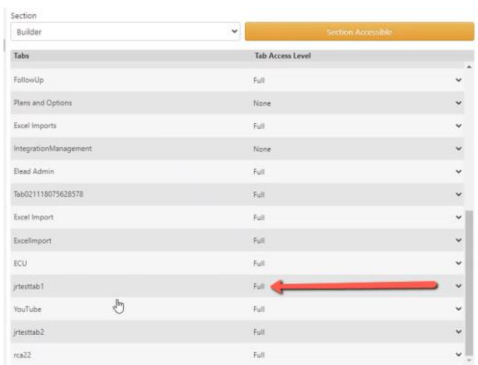
Original Release Date – September 2021

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 (if applicable). Please contact the Professional Services 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.

New Features

Builder

- New fields have been added under Builder > Field Labels > Dropdowns, allowing modification to do be done within the Builder section instead of within the application using Edit Mode. These new fields are:
    - Attachment Group
    - Attachment Type
    - Adjustment Type
- A new report category has been added to Builder > Master Reports, allowing for information-only PDF documents to be added as a document type.
    - *Note: Merge Fields do not work on PDF format documents.*
- Custom Tabs have been updated to allow administrators to allow or restrict custom tabs by user. This can be done under Builder > Users.



- **Show Inactive** buttons have been added to Attributes and Attribute Groups.
- Builders can set up more than four (4) **Contract Packages**. The names of the contract packages are managed in **Builder > Field Labels**.
- A new **Topo Map** parameter has been added to display sold lots with contingencies as Available instead of Sold.
    - *Note: Builders will need to use Contingencies in the Customer section for this feature to work. When contingencies expire, users will need to update the Customer record accordingly.*

Subdivision

- A new subdivision setting (Round Prices in Total Price Breakdown) has been added to toggle price rounding within the Total Price Breakdown dropdown within the Customer record.
    - *Note: Upon release of Version 22, this will automatically be turned on to match what Sales Simplicity has displayed on the Total Price Breakdown dropdown in the past.*
- On the **Lots** tab, labels for House (Base), Trim/Masonry, Roof Tile, etc. have been moved from within the text entry box to above the text entry box
- In **Topo Admin**, administrators can **Set Builder Default Icons** for their topo maps if they wish to use their own icons. Once these have been uploaded, the administrators are able to apply the icons to all subdivisions and phases.

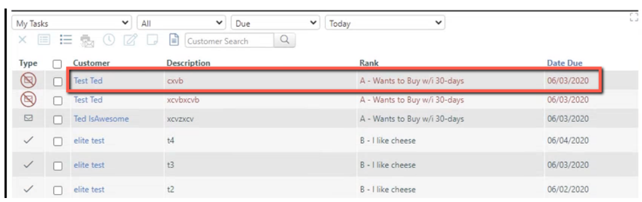
Customer

- Email Signatures that are set in **Builder > Users** are now displayed when creating or modifying an outgoing client email from within Sales Simplicity.
- Users will be able to identify if customers have unsubscribed from emails via an unsubscribe link or if the user has unsubscribed the customer from emails by hovering over the **Do Not Email** icon on the **Buyer** tab.

- On the **Lots** tab, labels for House (Base), Trim/Masonry, Roof Tile, etc. have been moved from within the text entry box to above the text entry box.

Follow Up

- On the **To Do Suite**, customers that have an email task due but do not have an email address on their customer record will be displayed in red text. This helps users identify which customers may need more information on their record.



- In **Customer Marketing**, the Include/Exclude filters have been updated to help produce better search results.
- In **Email Stats**, users can select the email subject of an email that was sent to see what the contents of the email were. Merge fields will display as the merge field instead of showing generic data.
- In the **To Do Suite**, users with the Outlook integration will receive an alert when loading an email they are unable to view due to access issues (being unable to log into an Outlook account that does not belong to the user).

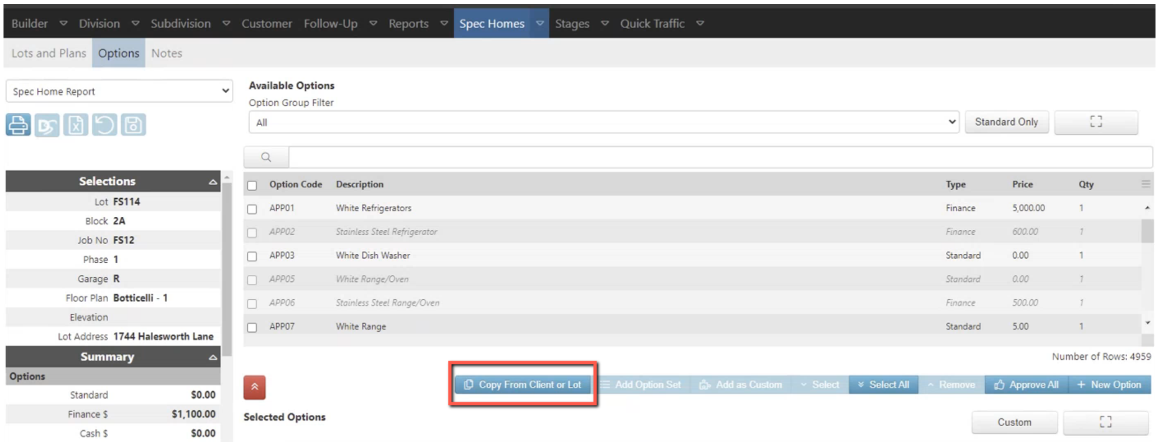
- In the **Control Center**, Web Visits displays additional information, such as session times, specific URL visits, and more.
- In the **Control Center**, users can create their own custom Search Lists that are easy to access and modify without needing access to the Customer Marketing tab.

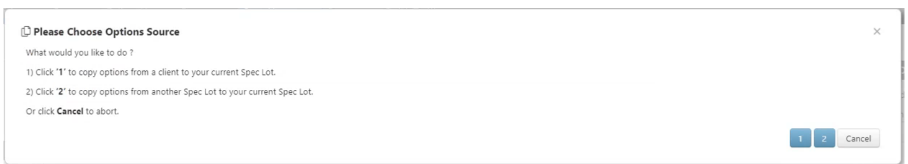
Spec Homes

- Users are now able to copy options from one spec home to another. This is done on the Options screen using the **Copy From Client or Lot** button. Once the user selects the **Copy From Client or**

Lot button, the user can select if they want to copy from a client to the currently selected spec lot <u>or</u> if they would like to copy from another spec lot to the currently selected spec lot.

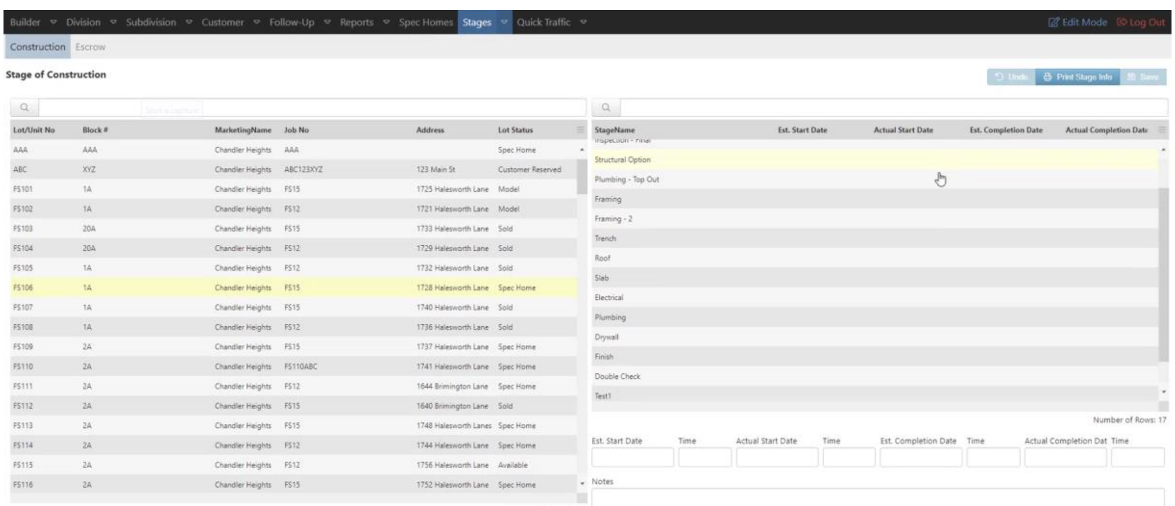
- *Note: Options that are specific to a phase/plan may not be copied over due to their availability.*





Stages

- The Stages section has been updated to have larger tables, making the data easier to read.



Stages of Escrow can now track Escrow stages of Spec Home lots. These stages can be created within Builder > Field Labels > Dropdowns and identified as a Job Specific Stage.

Resolved Issues

General

Update: Updated the Timberline integration to exclude jobs from scenarios in inactive subdivisions.

Update: In FLI Edit Mode, the Pencil icon to indicate Edit has been updated across the application for consistency.

Issue: When a new blog post was added to the front page of Sales Simplicity, some users reported they were unable to see the new posts upon logging in. This was caused by the site caching the front page.

Resolution: Users should now be able to see all updates to the front-page blog without having to clear their cache and cookies.

Builder

Issue: Administrators were unable to add attributes to existing attribute groups.

Resolution: Administrators can add attributes to existing attribute groups.

Issue: Users that do not have permission to view or modify other user's customers were able to view and/or modify other user's customers.

Resolution: Permissions were updated to ensure that users without permissions to view/modify other user's customers cannot view/modify other user's customers.

Issue: On Topo Maps (pulled from URL's stored in Builder > Generator) that have minimal borders/edges, the information pop-up for lots near the edges of the image were being cut off.

Resolution: The information pop-up has been adjusted to prevent overlap with the edge of the topo map image, allowing all information to display as expected.

Issue: When attempting to deactivate specific Attributes, the button was not registering the button click, keeping the attribute Active.

Resolution: Attributes are now able to be toggled Active or Inactive.

Issue: When updating user information in Builder > Users, an error was generating.

Resolution: Errors no longer occur when updating user information.

Issue: In Builder > Field Labels, some builders were seeing a blank default language set.

Resolution: The Language Set now displays with the default language set instead of displaying blank.

Issue: Follow Up Campaigns using the Stages of Construction filter were not triggering tasks.

Resolution: Follow Up Campaigns using the Stage of Construction filter now generate tasks in the Follow Up section.

Division

<u>Issue</u>: Users must be able to view all information on the Option Rules > Rule Groups pop-up, regardless of screen size.

<u>Resolution</u>: The UI was updated, allowing for all information in the Rule Groups pop-up to be viewed.

<u>Issue</u>: The Master Plans tab was not loading properly for users that only had the <u>View Only</u> permission for the specific tab.

<u>Resolution</u>: Master Plans now loads as intended for users with <u>View Only</u> permission on that tab.

<u>Issue</u>: When creating Option Rules, the Wildcard rule in combination of any "is exclusive" rule was allowing multiple option selections instead of a singular option selection.

<u>Resolution</u>: The Wildcard Option Rule now functions as expected.

Subdivision

<u>Issue</u>: Users that have the permission **Can Keep Sort Order** were unable to create/edit Date Effective Pricing (DEP) for specific floor plans in Subdivision > Floor Plans

<u>Resolution</u>: Users with the **Can Keep Sort Order** permission are now able to create/edit DEP in Subdivision > Floor Plans.

<u>Issue</u>: The <u>Uncheck All</u> box on the Lot/Option Matrix tab was not deselecting all selected options.

<u>Resolution</u>: The Uncheck All box now operates as intended.

<u>Issue</u>: When making an option active on a floor plan, the option does not always become active.

<u>Resolution</u>: Options now become active when they are made active on a plan.

Customer

<u>Issue</u>: Cash Option price totals displayed on the Total Price Breakdown change depending on the screen that the user is on.

<u>Resolution</u>: Negative Option Prices now calculate properly, allowing cash option totals to display properly on all screens.

<u>Issue</u>: Users were unable to update the email address of a customer. An error code would occasionally appear, preventing the user from updating the customer's contact information.

<u>Resolution</u>: Users can update a customer's email address without producing an error.

<u>Issue</u>: When entering a note on the Notes tab, users would receive an error code while typing in the text box.

<u>Resolution</u>: Entering notes on a customer record works as intended.

<u>Issue</u>: Adding a new scenario was not working on every screen within the Customer section.

<u>Resolution</u>: Users can add a new scenario for a customer on any screen within the Customer section.

Issue: If users were not entering a description for a Custom Option, an error code would display on screen.

Resolution: Users are now required to enter in the description for a Custom Option. Users can save with the option description being blank – Sales Simplicity generates a pop-up notification for users if this occurs that the user must read and close. No error code will generate.

Issue: When sending an email to a customer from their customer record, email templates are not working as intended. The email template will either fail to load or will display with empty boxes within the editor.

Resolution: Email templates are loading as intended, allowing users to email customers from their customer record.

Issue: On the Contract screen, counter offers over $999,999.99 were causing the system to generate an error upon save.

Resolution: Counter offers over $999,999.99 no longer generate an error.

Issue: Attributes from an inactive attribute group were not displaying attribute selections for users who have permissions to view and modify attribute selection.

Resolution: Attributes from deactivated attribute groups are visible for customers who have already selected the specific option-deactivated attribute combination.

Issue: Negative Cash Options were not calculating correctly on Customer records.

Resolution: Negative Cash Options are now calculating as intended.

Issue: When printing the Virtual Topo from within Sales Simplicity, lot data was being cut off.

Resolution: Lot data is no longer cut off on the Virtual Topo print out.

Issue: The Loan Officer field was being hidden when the Loan Details field was changed to Invisible.

Resolution: Loan Officer is no longer automatically hidden if the Loan Details field is hidden.

Issue: If a spec home is selected on a customer record, but changes were made in the Spec Homes section, an alert would only appear on the Buyer or CoBuyer screen. If a user had selected a link from the Customer Search taking them to a different page on the customer record, the alert would not appear.

Resolution: When changes are made to a spec home that a customer selected, an alert will appear on any page that the user goes to (Buyer, CoBuyer, Notes, etc.) from the Customer Search screen.

Issue: Plan attachments (from Division > Master Plans) are duplicating on the customer record.

Resolution: Plan attachments are no longer duplicating.

Issue: On any builder where the Field Label for Cancellation Reason was missing in the past, the Save button on the Contract tab was displaying as Enabled upon loading the page. This prevented users from making any changes to the page.

Resolution: The Cancellation Reason field label record has been re-added to those builders, allowing users to make changes to Customer > Contract.

Issue: When adding an option with a quantity above 1000, the extended price displayed as NaN.

Resolution: Prices for options with a quantity above 1000 now display the extended price.

Issue: When printing multiple contract documents, Electronic Document Storage was not processing all the selected documents properly, causing the first selected document to replace all documents selected for print.

Resolution: Documents print properly when printing multiple documents from the Customer > Contract screen.

Follow Up

Issue: Email blasts to Realtors (sent from the Customer Marketing tab) were not tracking stats in the Email Stats tab.

Resolution: Email Stats are now available on email blasts sent to Realtors.

Issue: In the Customer Marketing tool, loading the text editor results in a lack of a text field. Upon further attempts, the text field would not save changes made to it, causing content to not be placed into an email.

Resolution: The text editor loads properly and saves changes, allowing users to create and send emails from the Customer Marketing tool as intended.

Issue: Tasks created in a follow up campaign were not completing on the correct date and time. Email tasks that were set to automatically send were not sending from the correct email address or at the correct date and time.

Resolution: Tasks created in a campaign that are set to automatically complete or send now work as intended.

Issue: When viewing the Control Center, some customers in the Wonderwall widget are not displaying with whole number point values.

Resolution: On the Wonderwall widget in the Control Center, scores will round to the nearest hundredth (example – 2.488 would round to 2.49, 2.498 would round to 2.5, 2.492 would round to 2.49).

Issue: Some users that utilize Google Chrome were having issues loading Follow Up > To-Do Suite. The page would attempt to load until an error would display on screen.

Resolution: The To-Do Suite now loads properly in the Google Chrome browser.

Issue: When creating a list in Customer Marketing, none of the options for Recipient filter Other > Note generate results, even if there are matches to the filter.

Resolution: The filter Other > Note now generates results.

Spec Homes

Issue: When adding options to a Spec Home using the **Add Option Set** button, all options within an option set were not being added to a lot.

Resolution: All options within an option set are now added to the lot when the option set is selected.

Issue: Updating Lot Status or UserDefinedPrePlot fields in Subdivision > Lots will erase the Estimated Completion Date field if it has been filled in previously for a lot.

Resolution: The Estimated Completion Date field does not clear when Lot Status or UserDefinedPrePlot fields are updated in Subdivision > Lots.

Issue: The Virtual Topo web view and print out were showing different calculations for pricing on different lots.

Resolution: The web view and print out versions of the Virtual Topo now calculate the same, leading to the same pricing on both pages.

Issue: Using **Select All Standard** in Spec > Options either results in the error "This phase does not allow options to be added" or freezes the screen while loading the options.

Resolution: **Select All Standard** no longer generates an error or freezes the screen when loading standard options onto a spec lot.

Email Creation Utility (ECU)

Issue: New emails created within the Email Creation Utility, such as workflow notifications, have spacing issues when sent out.

Resolution: Spacing issues have been resolved, making the emails match what is displayed in the editor.