Version 1.513 Release Notes

BuilderTek
Version 1.513
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🧑‍🔧 New Features

- **Pricing Request - Pricing Completed**- In this latest version, we have introduced a new button on the Pricing Request interface. By clicking on this button, the Pricing Request Status will be changed to "Pricing Request Returned," and the Pricing Request Line Status will be updated to "Pricing Completed." Additionally, an email notification will be sent to the Pricing Request Selection Manager.

- **BT Payment Request**- In the latest version, we have introduced a new button labeled "Create Cash Disbursement" that allows you to generate a cash disbursement for a payment request.

- **Enhanced Pricing Request Status Change - Pricing Request Returned** In the latest version, we have implemented an enhancement that allows users to change the status of a Pricing Request to "Pricing Request Returned." Notably, when this status is selected, the system will automatically set the "Date Pricing Returned" field to the current date, providing accurate and up-to-date information. This improvement streamlines the process and ensures efficient tracking of Pricing Requests.

- **PO - Update the Create Payment Request flow/logic -** In the latest package, we have added a new flow in Create Payment Request button that is present on the BT Purchase Order record page. When the user clicks on this button it will create a Payment request and it will attach the newly created payment request to the recently available Contractor's invoice if Contractor's invoice is not present then it will create a new Contractor's invoice and attach the payment request to newly created Contractor's invoice.

Fixed Issues

- **Resolved UI Issue: New RFQ Button in Opportunity**- Previously, there was an issue with the user interface (UI) when clicking the "New RFQ" button from the Opportunity module. However, I am pleased to inform you that this issue has been successfully fixed. Users can now click the "New RFQ" button without encountering any UI-related problems.

- **BT Sales Invoice - Send Payment Request**- Previously, there was an issue with our system when users clicked on the "Send Payment Request" button, as it would generate an email with a fixed "Regards, BuilderTek" line.
  I am pleased to inform you that this issue has been successfully resolved, and we have implemented a dynamic company name feature. Hence, this email now carries the professional signature specific to your company.

- **BT Payable Invoice - Preview**- Previously, there was an issue where users encountered misalignment of "Cancel" and "Send Email" buttons when clicking on the preview button and selecting a specific template.
  We are pleased to inform you that this issue has been successfully resolved, and the buttons are now aligned correctly.

- **BT Pricing Request Line Details**- Previously, there was an issue with the functionality of the "Save & New" button when creating a pricing request line detail record.
  I am pleased to inform you that this problem has been successfully resolved. The button is now functioning correctly, allowing users to save their current record and immediately proceed to create a new one if desired.

- **BT Pricing Request - BT Pricing Request Lines**- Previously, there was an issue where the creation of new BT Pricing Request Lines would be successful; however, the associated BT Pricing Request record page failed to refresh automatically, requiring manual intervention.
  I am pleased to inform you that this issue has now been successfully resolved.With the implementation of the necessary updates, users can now create BT Pricing Request Lines seamlessly, with the BT Pricing Request record page refreshing automatically upon completion.

- **Change Order - Creating a new Change Order is showing 3 decimal places**. **-** In the new version, the Creating a new Change Order page will show only two decimal places.

🚀 Improvements

- **Unable to update Sales Invoice** - With the recent update, users are encountering difficulties when attempting to update Sales Invoices that have associated receipts. Consequently, users are unable to modify existing Sales Invoices or add new Invoice Lines to these specific Sales Invoices.

- **Permits - Add an Email button and remove blue Email Permit button** - With this latest release, we are pleased to announce the introduction of an enhanced feature that enables users to send emails directly from the Permits module. This functionality has been incorporated into the Quick Action menu, conveniently labeled as "Email Permit."
  Users can now leverage this efficient and time-saving feature to initiate email communication associated with Permits. By simply clicking the designated Quick Action button, the system will prompt the user to compose and send emails seamlessly, enhancing overall productivity and streamlining communication processes within the Permit module.

- **Sales Invoice - Stripe - Sending Stripe emails should capture history as the email does** - In the latest package now the user can track the email that is sent through the Send Payment Request button in the Activity tab on the BT Sales Invoice record page.

- **PO - Create Payment Request** - In the latest version, when the user clicks on Create Payment Request on the BT Purchase Order record page a pop will open and in that pop the Account field will auto-populate with the Vendor name field that is present in the BT Purchase Order record page.

- **BT Budget - Add CO** - Previously, when a user clicked on the "Add CO" button, a popup would appear displaying change order data with a status of "customer accepted."
  Now, we have enhanced the functionality to include additional options for change order on the popup box which change order status is "Customer Approved," "Customer Accepted," or "Approved."

- **BT Quote -** Previously, when users added products from the BT Quote record, the field value "UOM" was not being updated in the BT Quote line.
  However, we have made improvements to this functionality. Now, the "UOM" field of the BT Quote Line is automatically updated with the value from the corresponding field named "Quantity Unit of Measure" of the Product record.