Version 6.7.0.1

Hotfix Notes

June 10th 2015

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Contacting Support and Services

Support for the BuildTopia software is available at Constellation's Baltimore and Markham offices.

Baltimore Main Office

Telephone: 1 410 843-3800
Fax: 1 410 843-3853
Web: http://www.constellationhb.com

Support Desk

Support Desk assists with software operations.

Telephone: 1 800 411-2020 Option #4
Email: support@buildtopia.com
Hours: Monday through Friday 9:00 a.m. to 5:00 p.m. (Eastern Standard Time)

Professional Services

Contact your company's Professional Services Consultant for assistance with software implementation, training, consulting, and data building.

Telephone: 1 905 475-2209 or toll-free at 1 888 723-2222
Fax: 1 905 475-7204
Web: http://www.constellationhb.com

Enhancements

This section highlights new features and enhancements that have been added to BuildTopia. Each item is identified by a ticket and / or defect number (where applicable) which tracks to our internal support and software development system. The product versions affected are listed with each item. There is also a description of the item with any relevant screenshots to detail the enhancement.

Messaging

<table>
<tr><td colspan="4">Options at the user level to choose how long notification messages are saved in the internal BuildTopia Inbox, and automated deletion of messages</td></tr>
<tr><td>Defect #:</td><td colspan="3">001-00-1-15735</td></tr>
<tr><td>Ticket #:</td><td colspan="3">001-00-218647, 001-00-232660</td></tr>
<tr><td></td><td>☒ BTBuilder</td><td>☒ BTSales</td><td>☒ BTService</td></tr>
<tr><td>Description:</td><td colspan="3">My Profile & My Profile > Edit
Trade Partner Account > My Profile & Trade Partner Account > My Profile > Edit Profile
Notification messages that are generated by actions in BuildTopia are saved in the BuildTopia Inbox ('Messages' link). This update adds settings for each user to determine how long messages are retained within the Inbox before being automatically deleted.
- The settings allow messages to be saved for 1 month, 3 months, 6 months, or 1 year.
- The default for read messages is 3 months.
- The default for unread messages is 1 year.
- Archived messages will not be automatically deleted.</td></tr>
<tr><td>Screenshots:</td><td colspan="3"></td></tr>
</table>

My Profile

Profile for John Doe, PM

First Name	John	License Number	987654321
Last Name	Doe	License Expiration Date	12/31/2010
Position	PM	Sales Commission Type	Percent
Email		Commission	5.0
Phone Number	(240) 399-0110	Compensation Description	Five Percent
Mobile Number	(240) 111-2222	Status	Active
Fax Number	(240) 222-3333	Read notification messages deleted from Buildtopia Messages inbox after:	3 Months
Direct Connect	1234567890123	Unread notification messages deleted from Buildtopia Messages inbox after:	1 Year
Server			

My Profile > Edit

Edit User Details for John Doe, PM

First Name*	John	Status	Active
Last Name*	Doe	Username*	johndoe
Company Position*	PM	Password*	•••••••
Email*	john@doe.com	License Number	987654321
Phone Number	(240) 399-0110	License Expiration Date	12/31/2010
Mobile Number	(240) 111-2222	Sales Commission Type	Percent
Fax Number	(240) 222-3333	Commission	5.0
Direct Connect	1234567890123	Commission Description	Five Percent
Read notification messages deleted from Buildtopia Messages inbox after:	3 Months		
Unread notification messages deleted from Buildtopia Messages inbox after:	1 Year		

Trade Partner Account > My Profile

My Profile

Name	John Doe	Email	john@doe.com
Company Position	Manager	Contact Preference	Email
Phone Number	(240) 399-0110	BuildTopia Role	BTTrade Administrator
Mobile Number		Read notification messages deleted from Buildtopia Messages inbox after:	3 Months
Fax Number		Unread notification messages deleted from Buildtopia Messages inbox after:	1 Year
Direct Connect		Server	

Trade Partner Account > My Profile > Edit Profile

Edit Profile

Company Position*	Manager	Read notification messages deleted from Buildtopia Messages inbox after:	3 Months
Prefix			
First Name*	John	Unread notification messages deleted from Buildtopia Messages inbox after:	1 Year
Middle Name			
Last Name*	Doe	User Name*	johndoe12
Suffix		Password*	•••••••
Phone Number*	(240) 399-0110 X	Confirm Password*	•••••••
Fax Number	X	Current Password*	

Sales

Addition of new tags to show the termination date for sales agreements	
Defect #:	001-00-1-19559
Ticket #:	001-00-229492
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	The tags below have been added to show termination dates on generated sales contracts. @@agreement_terminated_date_short@@ (e.g. 01/01/2015) @@agreement_terminated_date_long@@ (e.g. January 1, 2015)

Defect Fixes

This section highlights corrections and defect fixes that have been applied to BuildTopia. Each item is identified by a ticket and / or defect number (where applicable) which tracks to our internal support and software development system. The product versions affected are listed with each item. There is also a description of the item with any relevant screenshots to detail the defect.

Sales

Issue with the creation of new change orders when 'Cancel' is clicked

Defect #:	001-00-1-19471		
Ticket #:	001-00-233953, 001-00-234539		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Buyers > Agreement > Actions > Create a Change Order Sales > SPECs > SPEC Agreement > Actions > Create a Change Order When the 'Create a Change Order' link is clicked the user is taken to the create CO page. If 'Cancel' was clicked, a new change order was created anyway. This has been corrected, if 'Cancel' is clicked a new change order will not be created.		

Display of manage buyer links and actions for terminated buyers

Defect #:	001-00-1-19589		
Ticket #:	001-00-234872		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Buyers > Terminated tab > Buyer name The actions drop down, and related links on sub tabs will now be shown for terminated buyers for users who have a sales role that includes the 'Manage Buyer Information/Tasks' permission.		

Issue with display of internal notes for options of workup pages

Defect #:	001-00-1-19627		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Prospects > Workups > Manage Workup Sales > Buyers (all tabs) > Agreement > Manage Workup Sales > SPECs (all tabs) > Agreement > Manage Workup The 'Internal Notes' field notes on workup/agreement pages was showing selection notes instead of internal notes from the option. This has been corrected.		

Issue with some buyers linked to an incorrect project

Defect #:	001-00-1-19883
Ticket #:	001-00-235811, 001-00-236298, 001-00-236658
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	Sales > Buyers In some cases, a buyer would be tied to an incorrect project during the process of submitting the agreement. This issue has been corrected.

Issue with the differential field when differential amount exceeded 4 digits

Defect #:	001-00-1-19745
Ticket #:	001-00-235437
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	Sales > Buyer > Agreement > Differential link The differential field did not accept cents when the amount exceeded four digits. This issue has been corrected.

Updates to the Buyers, SPECs, and Lot Matrix lists in Sales

Defect #:	001-00-1-19279
Ticket #:	001-00-233615
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	Sales > Buyers Sales > SPECs Sales > Lot Matrix The sorting and filtering selections on these pages have been updated to maintain the selected options while logged in.

Updates to the Price Plans > Price Lots page

Defect #:	001-00-1-19290, 001-00-1-19890
Ticket #:	
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	Sales > Price Plans > Price Lots - The lot number column was not showing the full custom lot number. This has been corrected. - The 'Construction Status' column has been added. - The 'Current Price' column has been added. - The 'Plan Status' column has been added.

Update to workups sub tab on the lot detail page in Sales

Defect #:	001-00-1-19628		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Lot Matrix > View > Workups tab		

When a prospect/buyer who has a co-buyer/co-prospect has a workup/agreement, both the main prospect/buyer and the co-buyer/co-prospect are shown on the workups list, even though they are on the same workup/agreement. This has been updated to only show the primary prospect/buyer.

Addition of 'Completion Date' to list of Current SPECs

Defect #:	001-00-1-19682		
Ticket #:	001-00-235419		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > SPECs > Current tab		

A 'Completion Date' column has been added to the Current SPECs list to show the completion date from the construction schedule on the lot.

Issue when adding a co-prospect and copying the primary prospect's address

Defect #:	001-00-1-19741		
Ticket #:	001-00-235565, 001-00-236038, 001-00-236504		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Prospects > Prospect Name > Actions > Add Co-Prospect		

When adding a co-prospect there is a checkbox that says 'Check here if you would like to use the same address and home phone as the Primary Prospect'. When this was checked the City, State and Zip were not copied. This has been corrected.

Issue with the 'From' email address when sending single prospect emails

Defect #:	001-00-1-19458		
Ticket #:	001-00-231401		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Prospect > Email		

When a single email is sent to a prospect the user has the ability to change the 'From' email address. The typed in address was not being shown as the 'From' address when the email was received. This has been corrected.

Issue with the email address fields for prospects

Defect #:	001-00-1-19655		
Ticket #:	001-00-235324		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	The email address fields for prospects and buyers have been adjusted to allow email addresses with 1 letter in the domain name e.g. johndoe@j.com.		

Agreement termination date not captured when a submitted agreement was terminated

Defect #:	001-00-1-19834		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Buyers > Agreement Submitted > Actions > Terminate Agreement The agreement termination date was not captured when a submitted agreement was terminated. This has been corrected.		

Issue with prospect notes exceeding allowed character limit

Defect #:	001-00-1-19938		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Prospects > Prospect Name > Actions > Add Notes An error message was shown when trying to save notes that exceeded the 4000 character limit. This has been updated to truncate and save the allowed portion.		

Project Management

Issue with the update of attributes on open purchase orders during the SPEC to PA process

Defect #:	001-00-1-19625		
Ticket #:	001-00-234699, 001-00-235994		
	☒ BTBuilder	☐ BTSales	☐ BTService
Description:	PM > Lot Matrix > CO > Update Activity List When there are attributes on a SPEC agreement that is in production and POs are generated, the attribute information is added to purchase orders. If the lot is sold to a buyer, the purchase agreement can change the attributes. If the attributes change, the SPEC to PA process should have updated open purchase orders, in a similar way to how POs are updated when selection notes are updated. This was not happening consistently for attributes. This has been corrected.		

Issue with the lots shown on the lot selector for the Project Month Schedule

Defect #:	001-00-1-19509		
Ticket #:	001-00-234802		
	☒ BTBuilder	☐ BTSales	☐ BTService
Description:	PM > Lot Matrix > Month Schedule The list of lots shown on the lot selector for the Project Month Schedule should only include lots that have open tasks, instead of a list of all lots. This has been corrected.		

Updates to the validation of the 'Duration' and 'Lag' fields on the edit schedule task page

Defect #:	001-00-1-19350		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Project Management > Lot Matrix > Review Schedule > Edit - The 'Duration' and 'Lag' fields are now marked as required. - The 'Duration' field will only accept positive numbers. - The 'Lag' field will only accepted numbers (positive and negative).		

Bidding & Contracting

Correction of scope of work shown for plan base activities

Defect #:	001-00-1-17357		
Ticket #:	001-00-225756		
	☒ BTBuilder	☐ BTSales	☐ BTService
Description:	Bidding & Contracting > Proforma Budgets > Base tab The scope of work shown for base activities was incorrectly pulled from the activity at the Data Library level instead of the plan level. This has been corrected.		

Admin

Issue with the value shown for the Warranty setting on the Project Settings page

Defect #:	001-00-1-19706		
Ticket #:	001-00-235269		
	☒ BTBuilder	☒ BTSales	☒ BTService
Description:	Admin > Projects > Project Settings > Warranty Package for Project 'None' has been added to the drop down for the 'Warranty Package for Project' setting to show when no warranty has been selected.		

NSO

Issue with sorting of search results on the NSO Archive list		
Defect #:	001-00-1-19511	
Ticket #:	001-00-234594	
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	NSO > Archive > Search The sorting of search results has been adjusted to sort first by lot number, then by NSO number.	

Reports

Error message when trying to delete a report with an email schedule		
Defect #:	001-00-1-19560	
Ticket #:		
	☒ BTBuilder	☒ BTSales	☒ BTService
Description:	Reports > On-Demand Reports > Delete An error message was shown when trying to delete a report that had an email schedule. This has been corrected.	

Accounting

Error message when trying to view Accounting export logs		
Defect #:	001-00-1-19576	
Ticket #:		
	☒ BTBuilder	☐ BTSales	☐ BTService
Description:	Accounting > Log > Export > Audit # In some cases an error message was shown when trying to view details for export logs. This has been corrected.	

Browser Related

Issue with the addenda print form when using Google Chrome		
Defect #:	001-00-1-19379	
Ticket #:		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales > Buyers > Agreement > Addenda The addenda print form was not visible after adding a new addenda when using Google Chrome. This has been corrected.	

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2015. This information is not a complete list of all features that will be in the releases, and is subject to change. If you have any suggestions in these areas, please contact the Customer Support Desk.

Version 6.7.1, Q3 2015

- DocuSign integration.
- General usability updates.