



Version 6.6.0.2

Hotfix Notes

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Product and Company Information

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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.

Allow editing of lot information on completed lots that are released for Spec & Released for Sale & SPEC

Defect #:	001-00-1-15614
Ticket #:	001-00-215399, 001-00-218105, 001-00-218216
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Admin > Projects > Lots > Edit SM > Lot Matrix > Edit PM > Lot Matrix > Edit On these pages we now allow lot information to be edited when the lot is completed and the lot is either Released for SPEC or Released for Sale & SPEC.

Addition of 'Export Date' and 'Exported By' fields to the purchase order view page

Defect #:	001-00-1-12486
Ticket #:	001-00-152706
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Purchase Orders > search > PO number 'Export Date' and 'Exported By' fields have been added to the Purchase Order view page. They will show name of the user who exported the PO via linktopia and the export date.

Addition of details to the change order notification messages

Defect #:	001-00-1-15615
Ticket #:	001-00-218409, 001-00-219980
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Options details including attributes where used have been added to the Change Order Submitted, Change Order Response, and Change Order Approval notification messages.

Ability to return to a point on the page after editing a schedule task

Defect #:	001-00-1-14649
Ticket #:	001-00-213699
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Lot Matrix > Review Schedule > Edit When 'Save', 'Cancel', or 'Delete' are clicked after editing a task on a lot's schedule, you will now be returned to the point of the schedule where you were previously, rather than to the top of the schedule.

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.

<i>Error message when adding/editing co-prospects/co-buyers and using the main prospect's/buyer's address</i>	
Defect #:	001-00-1-15765
Ticket #:	001-00-219091, 001-00-219125, 001-00-219356, 001-00-219392, 001-00-219418, 001-00-219484, 001-00-219530, 001-00-219585, 001-00-219730, 001-00-219780, 001-00-219797, 001-00-219992, 001-00-220127, 001-00-22018, 001-00-220133, 001-00-220134, 001-00-220216, 001-00-220217, 001-00-220218, 001-00-220330
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	SR > Prospects > Prospect Name > Actions > Add Co-Prospect SR > Prospects > Prospect Name > Co-Prospects > Edit SR > Buyers > Buyer Name > Actions > Add Co-Buyer SR > Buyers > Buyer Name > Actions > Co-Buyer > Edit An error message was shown when the check box to use the primary prospect/buyer's address was checked when adding or editing a co-prospect/co-buyer. This has been corrected.

<i>Issue with termination of SPEC workups when PA's are accepted</i>	
Defect #:	001-00-1-15934
Ticket #:	001-00-219781, 001-00-220029, 001-00-220270
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	SM > Manage Buyers & SPECS > Agreement Submitted > Accept When a submitted agreement is accepted, and the lot status is pending (not yet released to production) SPEC workups should be terminated. This was not happening consistently, but has now been corrected. *This issue has been corrected going forward, but there might be some old lots that show SPECS that should not exist. If you happen to notice any of these please inform Customer Support.

<i>Issue with creation of task-activity relationships when using the activity wizard</i>	
Defect #:	001-00-1-15447
Ticket #:	001-00-217870
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Lot Matrix > Update Wizard > Add Missing Activity Codes When activities were added to a lot that has an approved construction schedule using the Update Wizard in PM task-activity relationships were not created. This has been corrected.

Issue with attributes on the edit page for change orders

Defect #:	001-00-1-15824
Ticket #:	001-00-218996, 001-00-219191
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	SR > Buyers > CO > Edit SR > SPECS > CO > Edit When the edit screen for change orders is loaded, if attributes were selected on an option, and that attribute is now archived, '--Select--' was shown. When that change order was saved the previously selected attribute was deleted. This has been corrected. Attributes previously selected will always be retained unless changed by the user on the change order.

Issue with attributes on change orders when POs are already generated

Defect #:	001-00-1-16073
Ticket #:	001-00-218996
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > CO > Update Activity List When a change order is done for an agreement that changes the attributes of an option there are 2 issues that were occurring when applying that CO to the activity list: - The update screen did not indicate that the attributes had changed - If POs had been generated for the option the POs were not updated Both of these issues have been corrected.

Issue with the display of the attribute name if double quotes were used

Defect #:	001-00-1-15528
Ticket #:	001-00-218104
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	SR > Buyers > CO > View SM > Manage Buyers & SPECS > CO > View PM > Lot Matrix > CO > View If the option attribute selected on a change order had double quotes that attribute was not shown correctly on the change order view pages. This has been corrected.

Issue on the edit buyers page in SR when the 'SR Write' role is used

Defect #:	001-00-1-15864
Ticket #:	001-00-219565
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	SR > Buyers > Buyer Name > Edit Buyer When a user has the 'SR Write' sales role they couldn't edit a buyer's name even when the 'Allow SR to edit buyer information?' sales setting was set to Yes. This has been corrected.

Issue causing duplicate activities when releasing a NSO when using the 'Back' button

Defect #:	001-00-1-15885
Ticket #:	001-00-219633
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	NSO > Lot Matrix > NSO List > NSOs (for a lot) > Manage > Release NSO When a NSO is released, if you used the browser's back button you could go back to the previous screen and release the NSO again causing duplicate activities to be added to the lot's activity list. This process has been updated to prevent this issue. Please note that we do not recommend using the browser back button while within BuildTopia.

Issue with double-clicking possible creating multiple workups for prospects

Defect #:	001-00-1-15604
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales Rep > Prospects > Prospect Name > Actions > Create New Workup > Continue Double-clicking the 'Continue' button on this page could create more than one workup. The page has been updated to prevent this issue.

Issue with double-clicking possible creating multiple CS requests

Defect #:	001-00-1-15963
Ticket #:	001-00-219930
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	CS > Owners > Owner Name > Create Request > Save CS > Owners > Owner Name > Create Request > Save and Add Item Double-clicking the 'Save' and 'Save and Add Item' buttons on this page could create more than one request. The page has been updated to prevent this issue.

Issue when trying to delete terminated NSOs that are tied to purchase orders

Defect #:	001-00-1-15863
Ticket #:	001-00-219219
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	NSO > Lot Matrix > NSO (for a lot) > Delete NSO > NSO List > All > Delete An error message was shown when trying to delete a terminated NSO that was tied to purchase orders. A notification will now be shown to explain that the NSO has purchase orders and therefore cannot be deleted.

Issue with how the lot-dependent option status was updated on lots

Defect #:	001-00-1-15546
Ticket #:	001-00-219219
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTSERVICE
Description:	Data Library > Plans > Options > Edit When the status on an option was changed to 'Lot-Dependent' from the Data Library > Plans level (DL > Plans > Options > Edit) lots tied to that plan were updated. This has been corrected so that the lots are only updated when the Plans at the Project level are updated (Admin > Projects > Plans > Options > Edit Status only, or when the save and flowdown feature is used from DL > Plans > Options > Edit > Save & Update Additional Plans > Project Plans tab or DL > Options > Edit > Save & Update Plans > Project Plans tab). *Please note that this did not affect workups, it only affected the list of lot-dependent options show on the Admin > Projects > Lots > Lot-Dependent Options page.

Issue with the de-duplicate functionality for marketing campaign emails

Defect #:	001-00-1-15684
Ticket #:	001-00-217725
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTSERVICE
Description:	Reports > On-Demand Reports > Run Report > More Actions > Generate Campaign The de-duplicate functionality for marketing campaign emails did not eliminate duplicate email address that are in different cases (capital/small letters). This has been corrected.

Issue with the password fields on the Edit Profile page

Defect #:	001-00-1-15823
Ticket #:	001-00-219309
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTSERVICE
Description:	My Profile > Edit When changing a user's password from the my profile page a box should pop up to enter and confirm the password similar to when the same action is done from Admin > Users > Edit. Instead, the password boxes were shown at the top of the page. This has been corrected.

Retain filter selections on the prospect list after deleting a prospect

Defect #:	001-00-1-14532
Ticket #:	001-00-215280
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTSERVICE
Description:	SR > Prospects > Delete The filter selections on the prospects list were reset after a prospect was deleted. This has been corrected.

Retain sorting selections on the Purchase Orders results list

Defect #:	001-00-1-14635
Ticket #:	001-00-214271
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Purchase Orders > Purchase Order list (search results) The purchase order search results list has been updated to save the filter and sorting selections that users make while they are within that project.

Issue with plans shown when applying new option prices to plans

Defect #:	001-00-1-16137
Ticket #:	001-00-220208
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	SM > Price Options > Edit Option Prices > Select a Category > Save and Apply to Other Plans > Both tabs When options were saved for a plan and the 'Save and Apply to Other Plans' button was clicked, the plan that was originally being worked on was displayed on the both tabs. This was misleading because the new option prices had already been saved for that plan. Going forward the original plan will not be showing on those tabs.

Issue with the Release to Production notification message

Defect #:	001-00-1-14281
Ticket #:	001-00-216197
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales Management > Lot Matrix > Release to Production When a lot was released to production no notification message was sent. This has been corrected.

Issue with the Change Order approval notification message

Defect #:	001-00-1-15032
Ticket #:	001-00-213305
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales Management > Manage Buyers & SPECS > CO > View/Approve > Approve & Send When a change order was approved the 'CO Approval' notification message was not sent. This has been corrected.

Issue with the notification message for Trade Partners when a Service Order is opened

Defect #:	001-00-1-15677
Ticket #:	001-00-151961, 001-00-214774, 101-29-147752
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	CS > Service Orders When a service order was opened no notification message was sent to the Trade Partner. This has been corrected.

Issue with the notification message for Trade Partners when a unit of measure bid is sent

Defect #:	001-00-1-11649
Ticket #:	001-00-216422
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Bids > Unit of Measure tab > Send When a unit of measure bid was sent to a Trade Partner no notification message was sent. This has been corrected.

Issue with the Month Schedule in Project Management

Defect #:	001-00-1-15788
Ticket #:	001-00-219251
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Month Schedule An error message was shown when the Trade Partner filter was used on the Month Schedule view in Project Management. This has been corrected.

Trade filter showing Qty choices on the DL > Plans > Options > Edit page

Defect #:	001-00-1-16163
Ticket #:	001-00-220466
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Plans > Options > Edit The 'Trade' filter on this page was showing values for the 'Qty' field instead of the 'Trade' field. This has been corrected.

Update of 'Sales Contract' document type to 'Sales Contract Template'

Defect #:	001-00-1-15733
Ticket #:	001-00-216422
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Document Management > Document Type field The document type 'Sales Contract' has been renamed 'Sales Contract Template' to help prevent confusion with updated sales agreements.

Fields re-arranged on the prospect and buyer email pages

Defect #:	001-00-1-15713
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	SR > Prospects > Email SR > Buyers > Email SR > Broker Agent/Mortgage Co List > Broker Agents tab > Email SR > Broker Agent/Mortgage Co List > Mortgage Companies tab > Email The format on these pages has been re-arranged to be more intuitive and load faster.

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2014. 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 6.6.1, Q2 2014

Focus – User interface re-design

- Combination of the sales modules.
- Detailed permissions for sales.
- Enhancements to messaging.