



BuildTopia

Version 6.0.0

Release 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>

Help Desk

Help 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.

Project Filter on the To-Do list and Prospect list screens in Sales Rep

Defect #:	001-00-1-8744
Ticket #:	148568
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > To-Do List and Sales Reps > Prospects A project filter has been added to the To-Do list and Prospect list screens in Sales Reps. The project filter shows the active projects that a user is associated to. This allows tasks and prospects in different projects to be seen without going back to the home screen.

Screenshots:



[Home](#) | [Reports](#) | [Admin](#) | [Data Library](#) | [Directory](#) | [Accounting](#) | [Messages](#) | [Help](#) | [My Profile](#) | [Log Out](#)

Welcome Noelle Marshall

[Home](#) > [Chesapeake Estates \(Single Family\): Sales Rep](#) > [To Do List](#) > [To Do List](#)

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
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Task View

Date Range
Today
Start Date: 03/07/2012 End Date: 03/07/2012

Projects
Chesapeake Estates (Single Family)

SR assigned to Prospects
My Prospects

SR assigned to Tasks
Marshall, Noelle

Prospect Type Code
-- All --

Origin
-- All --

Task Type
-- All --

Hide Overdue Tasks?

To Do List

[Broker Agent Open Tasks \(0\)](#) | [Mortgage Company Open Tasks \(0\)](#) | [Generate All Letters](#) | [Generate All Emails](#)

Dismiss?	Task	Prospect/Buyer	Origin	Due Date ▲	0	Actions
<input type="checkbox"/>	B - Standard Features	Elmaleh, Daniel	Followup Campaign	02/14/2012	0	Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	B - Standard Features	Jones, Heather	Followup Campaign	02/14/2012	0	Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	B - Standard Features	Jefferson, Thomas	Followup Campaign	02/14/2012	0	Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	B - Re-qualify	Pasco, Jennifer	Followup Campaign	02/15/2012	0	Complete Dismiss Reschedule
<input type="checkbox"/>	B - Personalize Your Home	Jefferson, Thomas	Followup Campaign	02/17/2012	0	Generate Email Dismiss Reschedule
<input type="checkbox"/>	B - Re-qualify	Elmaleh, Daniel	Followup Campaign	02/20/2012	0	Complete Dismiss Reschedule
<input type="checkbox"/>	B - Re-qualify	Jones, Heather	Followup Campaign	02/20/2012	0	Complete Dismiss Reschedule
<input type="checkbox"/>	B - Re-qualify	Jefferson, Thomas	Followup Campaign	02/20/2012	0	Complete Dismiss Reschedule



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Welcome Noelle Marshall

[Home](#) > [Chesapeake Estates \(Single Family\): Sales Rep](#) > [Prospects](#) > [Prospect List](#)

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
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Prospect List

[Search Prospects](#) | [Advanced Search](#) | [Add Prospect](#) | [New WIK Prospects\(4\)](#)

Project: Chesapeake Estates (Single Family)

Search: Prospects: All Prospects Type Code: All Status: All Source: All

Code ▲	Prospect Name	Email Address	Primary Contact	Status	Date Entered	Source	0	Actions
01 - A Prospect	Hart, Shelly	animal@test.com		New Prospect	02/23/2012	Manual	0	Edit Survey Workup Tasks Email Financials Broker Agent Info Mortgage Info Delete

Transfer Prospects functionality enhanced and moved to Admin > Company Setup

Defect #:	001-00-1-8832
Ticket #:	148568
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Company Setup > Sales > Transfer Prospects The Transfer Prospects feature that was at the Project level (Sales Management > Follow Up > Transfer Prospects) has been enhanced and moved to the Sales section of Admin > Company Setup. The updated prospects allows prospects from multiple projects to be transferred, and allows filtering by the prospect type codes assigned to prospects.

Screenshots:

Home > Admin > Transfer Prospects

Projects	Users	Imports	Company/Acct Info	Company Setup	BTService Setup
----------	-------	---------	-------------------	---------------	-----------------

Transfer Prospects

General

- Units of Measure
- Payment Terms
- Variance Codes
- Salutations
- Budget Settings
- Purchasing Settings
- Document Settings
- Document Folders
- Report Settings
- Print Form Settings
- Data Upload Wizard
- Lot Custom Fields
- Project Custom Fields
- User Custom Fields

Sales

- Sales Settings
- NSO Settings
- Prospect Type Codes
- Campaigns
- Company Questions
- Loan Programs
- Transfer Prospects

Permission Roles

Select a Sales Representative:	Marshall, Noelle ▾		
Select Projects:	<input checked="" type="checkbox"/> Chesapeake Estates (Single Family) <input checked="" type="checkbox"/> Dunnington Village (High Density Condo) <input type="checkbox"/> The Groves at Glen Allen (Custom)		
	<input type="checkbox"/> Select All		
	<input type="checkbox"/> UnSelect All		
Select Prospect Type Codes:	<input checked="" type="checkbox"/> 01 - A Prospect <input checked="" type="checkbox"/> 02 - B Prospect <input checked="" type="checkbox"/> 03 - C Prospect		
	<input type="checkbox"/> Select All		
	<input type="checkbox"/> UnSelect All		
Prospects:	<input checked="" type="checkbox"/> Allgerry, Amos <input checked="" type="checkbox"/> Barley, Matt <input checked="" type="checkbox"/> Baylor, James <input checked="" type="checkbox"/> Baylor, Rick <input checked="" type="checkbox"/> Bell, Gary <input checked="" type="checkbox"/> Bellerose, Mike <input checked="" type="checkbox"/> Bellimiso, Davido <input checked="" type="checkbox"/> Bennett, Charlie <input checked="" type="checkbox"/> Black, Janeece <input checked="" type="checkbox"/> Bosie, Jean <input checked="" type="checkbox"/> Braford, Katrina <input checked="" type="checkbox"/> Brelle, Francois <input checked="" type="checkbox"/> Brenner, Keith <input checked="" type="checkbox"/> Brodrick, John <input checked="" type="checkbox"/> Brooks, Jane <input checked="" type="checkbox"/> Brusca, Chad <input checked="" type="checkbox"/> Carpenter, Mark <input checked="" type="checkbox"/> Cece, Dana		
Select the Sales Rep to Assign the prospects to:	Good, Sally ▾		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Revision of how prospect, broker agent and mortgage tasks are re-scheduled. Addition of a sales permission role to control the ability to reschedule tasks.

Defect #:	001-00-1-8854
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Tasks can now be rescheduled by clicking on a reschedule link shown in the action column on the To-Do screen, and on the tasks lists on the task tabs for prospects, broker agents and mortgage companies. The link allows tasks to be rescheduled without having to go to a different screen. This ability is controlled by a new permission in sales roles.

Screenshots:



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Welcome Noelle Marshall

[Home](#) > [Chesapeake Estates \(Single Family\): Sales Rep](#) > [To Do List](#) > [To Do List](#)

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
-------	-----------	--------	-------------------------------	-----------	----------

Task View

Date Range
 Custom
 Start Date: 03/07/2012 End Date: 03/07/2012
 Projects
 Chesapeake Estates (Single Family)
 SR assigned to Prospects
 My Prospects

To Do List

Broker Agent Open Tasks (0) | Mortgage Company Open Tasks (0) | [Generate All Letters](#) | [Generate All Emails](#)

Dismiss?	Task	Prospect/Buyer	Origin	Due Date	Actions
<input type="checkbox"/>	B - Standard Features	Elmaleh, Daniel	Followup Campaign	02/14/2012	0 Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	B - Standard Features	Jones, Heather	Followup Campaign	02/14/2012	0 Generate Letter Complete Dismiss Reschedule



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Welcome Noelle Marshall

[Home](#) > [Admin](#) > [Edit Sale Role](#)

Projects	Users	Imports	Company/Acct Info	Company Setup	BService Setup
----------	-------	---------	-------------------	---------------	----------------

Edit Sale Role

General

- Units of Measure
- Payment Terms
- Variance Codes
- Salutations
- Budget Settings
- Purchasing Settings
- Document Settings
- Document Folders
- Report Settings
- Print Form Settings
- Data Upload Wizard
- Lot Custom Fields
- Project Custom Fields

Role name * * Required

Permissions

Check the permissions that this role should have

Sales Rep

- Sales Rep Read Only
- Sales Rep Read/Write
- Reschedule Tasks

Sales Manager

- Sales Manager Read Only
- Sales Manager Read/Write
- Delete Terminated Agreements

Sales Messages

Check the messages that users with this role should receive

- | | | |
|--|--|---|
| <input type="checkbox"/> Release to Production Request | <input type="checkbox"/> Sales Manager Response to Offer | <input type="checkbox"/> Sales Agreement Terminated |
| <input type="checkbox"/> Option Pricing Updated | <input type="checkbox"/> New Change Order Submitted | <input type="checkbox"/> Plan Pricing Updated |
| <input type="checkbox"/> Agreement Submitted | <input type="checkbox"/> Change Order Response | |

Addition of a Visit Notes field for prospects

Defect #:	001-00-1-8798
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	<p>A new field has been added for notes specific to recorded prospect visits. This text field that can take up to 4000 characters, and can be edited on these screens:</p> <p>Sales Rep > Prospects > Add Prospect Sales Rep > Prospects > Edit Prospect Sales Rep > Buyers > Buyer Summary > Edit Sales Management > Buyers > Buyer Summary > Edit</p> <p>Recorded visit notes can be seen on these screens:</p> <p>Sales Rep > Prospects > Prospect Summary Sales Rep > Buyers > Buyer Summary Sales Management > Buyers > Buyer Summary</p> <p>The new field is available on these data sets:</p> <p>On Demand Reports > New Report > People > Prospect/Buyer Information On Demand Reports > New Report > People > Survey Answers</p>

Screenshots:

[Home](#) > [Chesapeake Estates \(Single Family\): Sales Rep](#) > [Prospects](#) > [Prospect Report](#)

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
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Prospect: Dean Martin

[Search Prospects](#) | [Add Prospect](#)

Summary		Survey	Workups	Tasks	Financials	Broker Agent Info	Mort Comp Info
[Delete] * = Req							
Salutation:	First Name: *	M.I.	Last Name: *	Suffix:	Associated Sales Rep: *		
--	Dean		Martin	--	Sharee Hill		
Street Address 1:	123 Main St						Opt Out From Emails?
Street Address 2:							Yes <input type="radio"/> No <input checked="" type="radio"/>
City:	Somewhere	State: NY	Zip Code: 55555	Opt Out From Phones?		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Home Phone:	() -			Opt Out From Letters?		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Work Phone:	() -	ext.		Primary Contact:		Time to Contact:	
Mobile Phone:	() -			Prospect Code:		Prospect Status:	
Fax:	() -			01 - A Prospect *		New Prospect	
Email Address (primary):	test@test.com						Date Visited:
Email Address (Secondary):							[Pick Day]
Comments:							Initial Visit : 01/06/
							<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Visit Notes:

Email History [New Email](#)

Date Sent	To	Subject
No emails associated with this prospect.		

Visits

Date	Logged By	Notes
01/06/2012	Marshall Noelle	
02/01/2012	Marshall Noelle	Returned with Spouse

Notes [Add Note](#)

Date	Logged By	Notes
No notes associated with this prospect.		

Workups [Create New Workup](#)

Workup	Date	Lot #	House Type	Base	Premium	Options	Total Price	Actions
No workups created								

Project Information

<input type="checkbox"/> Company Accounting Code	<input type="checkbox"/> Project Address	<input type="checkbox"/> Project Company Name	<input type="checkbox"/> Project Name
<input type="checkbox"/> Project Accounting Code	<input type="checkbox"/> Project Administrator	<input type="checkbox"/> Project County	<input type="checkbox"/> Project State
<input type="checkbox"/> Project Accounting Code II	<input type="checkbox"/> Project City	<input type="checkbox"/> Project Manager	<input type="checkbox"/> Project Zip Code

Visits Dates

<input type="checkbox"/> Sales Rep	<input type="checkbox"/> Visit Date	<input type="checkbox"/> Visit Notes	<input type="checkbox"/> Visit Type
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Broker Information

<input type="checkbox"/> Address 1	<input type="checkbox"/> Broker License	<input type="checkbox"/> Email 1	<input type="checkbox"/> Realtor License
<input type="checkbox"/> Address 2	<input type="checkbox"/> City	<input type="checkbox"/> Email 2	<input type="checkbox"/> State

Change of 'from' email address for emails sent to prospects to show the Assigned Sales Rep's email address that is saved in BuildTopia

Defect #:	001-00-1-8104
Ticket #:	141530
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	<p>The 'from' address for emails sent to prospects used to be 'projectname@app.buildtopia.com.' Going forward the email address for the sales rep assigned to the task or the assigned sales rep of the project if the email is not from an email task. If the assigned sales rep does not have an email address in BuildTopia the 'from' email address will be 'noreply@buildtopia.com.' Users who do not have their email address saved in BuildTopia can do so by clicking on the My Profile link at the top right corner.</p>

Revision of the lot hold functionality for workups

Defect #:	001-00-1-8832
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>Going forward the following actions will occur whenever a workup is placed on hold:</p> <ul style="list-style-type: none">- The sales status of the lot is changed to 'Lot Hold.' While the lot is in this status no new workups can be created for the lot. If the lot hold is removed the sales status of the lot is reset to what it was before the hold was placed.- The status of the workup that has the lot hold is changed to 'Lot Hold.' Other workups on that lot with the status 'New Workup' will be set to the status 'Lot Has Hold'. Workups with the status 'Lot Has Hold' cannot be submitted until after the lot hold has been released.- If the lot hold is removed all workup statuses are reset to 'New Workup.'- If the workup with a lot hold is submitted its status will change to 'Agreement Submitted.' Other workups will not be available to be edited or submitted.- When the lot hold is created a task will be added with the due date equal to the lot hold expiration date. This task is to remind the sales rep to remove the lot hold when the lot hold expiration date arrives.- Lot holds are not removed by the BuildTopia application, regardless of the lot hold expiration date. Lot holds will remain in place until they are removed by a user.

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.

Correction of the printer icon pop-up icon for the Safari browser on iPads & iPhones

Defect #:	001-00-1-8854
Ticket #:	143981
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	The printer icon pop-up will now come up correctly on the Safari mobile browser on iOS devices (iPads and iPhones).

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2012. 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 helpdesk.

Version 6.1.0 - Release date July 10th 2012

Focus – Bidding & Contracting

- Improve functionality for copying turnkey bids and contacts across projects
- Standardize tax and quantity amounts in bids and contracts to 3 decimal places
- Add save and flowdown functionality to activities on activity packages and options

Version 6.2.0 - Release date November 5th 2012

Focus – Sales

- Add more permissions to sales roles
- Improve workups functionality
- Improve incentives functionality