



BuildTopia

Version 6.0.1

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>

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.

New Login Page	
Defect #:	001-00-1-8882
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	A re-designed login page has been introduced with this release. Also, users who do not have an email address in BuildTopia will be prompted to enter one. This is to enable us to introduce the ability login by email address and password only in a future release.
Screenshots:	

Simpler way to send mass email to prospects

Defect #: 001-00-1-8727

Ticket #: 001-00-148569

BTBuilder BTSales BService BLead

Description: There is now a new, simple way to send out a mass email to prospects. Use the advanced search to come up with a list of email recipients, select prospects to be included in the mailing list then click on the 'Merge Selected' button. On the next screen enter the task name, the task description, choose an email document, and click 'Submit' to send the emails.

- Access to this functionality is controlled by a Sales Role permission.
- The sent email will be shown in the task history of the prospects.
- The email address of the user will be used as the 'From' and 'Reply To' email address by default, but can be changed before sending the emails.

Screenshots:

Home > Amber Hills: Sales Rep > Prospects > Prospect Advanced Search

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

Prospect Advanced Search

Search Prospects | **Advanced Search & Mass Email** | Add Prospect | New WIK Prospects(0)

Prospect First Name	<input type="text"/>	Address 1	<input type="text"/>	Date Entered	<input type="text"/> to <input type="text"/>
Prospect Last Name	<input type="text"/>	Address 2	<input type="text"/>	Lot Number	<input type="text"/>
Prospect Email	<input type="text"/>	City	<input type="text"/>	Email Opt Out	-- All --
Assigned Sales Rep	All Sales Representatives	State	<input type="text"/>	Phone Opt Out	-- All --
Type Code	-- All --	Zip	<input type="text"/>	Letter Opt Out	-- All --
Status	-- All --	Cross Project Search	<input type="checkbox"/>	Prospects with email addresses only	<input checked="" type="checkbox"/>

Merge Selected To send an email to multiple prospects, select the prospects using the check boxes, then click 'Merge Selected'

Search

<input checked="" type="checkbox"/>	Code	Prospect Name ▲	Email Address	Primary Contact	Status	Lots	Date Entered		Actions
<input checked="" type="checkbox"/>	1-A	Boldin, Anquan	aq@boldin.co		New Prospect		11/17/2011	0	Edit Survey Workup Tasks Email Financials Broker Agent Info Mortgage Info Delete
<input checked="" type="checkbox"/>	6-WebLeads	Dickson, Ed	ed@dickson.co	-(h)	New Prospect		11/17/2011	0	Edit Survey Workup Tasks Email Financials Broker Agent Info Mortgage Info Delete
<input checked="" type="checkbox"/>	1-A	Flacco, Joe	joe@flacco.co		New Prospect		11/17/2011	0	Edit Survey Workup Tasks Email Financials Broker Agent Info Mortgage Info Delete
<input checked="" type="checkbox"/>	6-WebLeads	Hgata, Haloti	haloti@ngata.co	-(h)	New Prospect		11/17/2011	0	Edit Survey Workup Tasks Email Financials Broker Agent Info Mortgage Info Delete

Home > Amber Hills: Sales Rep > Prospects > Mail Merge

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

Task Name *	<input type="text" value="new email"/>
Task Description *	<input type="text" value="new email"/>
Document *	New email for SR
<input type="checkbox"/> Change Sender Email	<input type="text"/>
<input type="checkbox"/> Change Reply Email	<input type="text"/>
<input type="checkbox"/> Deduplicate by Email	

Instructions:

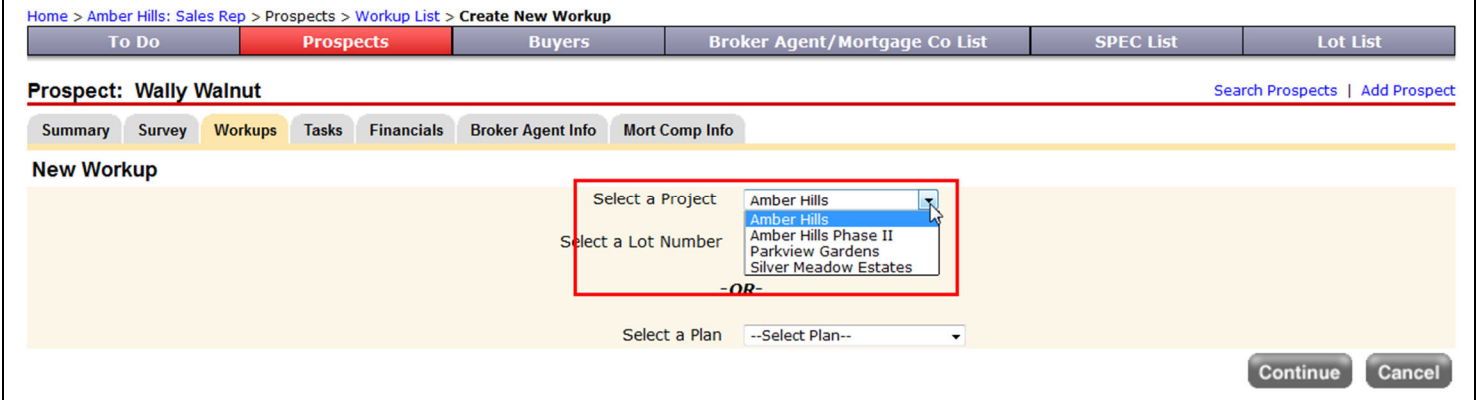
- Document - Since the selected prospects can consist of cross project records, the document must be assigned to each project in order to display in the selection list.
- The "From" and "Reply" email addresses on the emails generated will default to your email address.
 - To designate a different "From" address on the emails, select Change Sender Email and enter the new email address.
 - To designate a different "Reply" address on the emails, select Change Reply Email and enter the new email address.
- To prevent duplicate emails being sent to the same email address, select Deduplicate by Email to ensure that only one recipient with a specific email address receives the message.

Submit **Cancel**

Ability to create workups in projects other than the project the prospect is associated to

Defect #:	001-00-1-8762
Ticket #:	001-00-149089
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	When creating a workup for a prospect the user will be able to select any project that they have access to. The prospect will remain associated to the project they registered in, and can have workups in multiple projects. When one of the workups is submitted, the project that the prospect is associated to will change to match the project of the workup. This eliminates the need to create a prospect in multiple projects.

Screenshots:



Confirmation message when exporting Purchase Orders

Defect #:	001-00-1-9264
Ticket #:	001-00-149392
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Accounting > New Export Accounting > Re-Export A confirmation message will be presented whenever the 'Run Export' button is clicked during the New Export and Re-Export processes. The message will show the number of purchase orders about to be exported, and will give the user an opportunity to proceed or cancel the export. Also, to prevent unintended exports, the 'Run Export' buttons are now on the 'Purchase Order list' and 'Export Preview' steps only.

Screenshots:

Home > Linktopia > Export Preview

New Export Re-Export Log Setup

Export Preview Go To Step Preview Export

*The following is a preview of the file to be exported, displaying only a subset of the included records.

Approved Purchase Orders:

PO Number, Amount, Approved Date, Accounting Code, Cost Code, Lot
 AH2-10037, 0, 2/10/2006, "VAC", B1-04-2505, LAC, Approved
 AH2-10080, 0, 2/10/2006, "VAC", B1-04-2100, LAC, Approved
 AH2-10054, 0, 2/10/2006, "VAC", B1-94-7530, LAC, Approved
 AH2-10069, 0, 2/10/2006, "VAC", 3460, LAC, Approved
 AH2-10074, 0, 2/10/2006, "VAC", 6312, LAC, Approved
 AH2-10041, 0, 2/10/2006, "VAC", B1-06-2705, LAC, Approved
 AH2-10055, 0, 2/10/2006, "VAC", 6340, LAC, Approved
 AH2-10058, 0, 2/10/2006, "VAC", 2110, LAC, Approved
 AH2-10066, 0, 2/10/2006, "VAC", 3430, LAC, Approved
 AH2-10079, 0, 2/10/2006, "VAC", SH-1330, LAC, Approved

You are about to export 101 Purchase Orders.
 Click OK to Continue, or Cancel to revise your list of Purchase Orders.

Run Export Previous Cancel

Capture and display prospect type code history

Defect #:	001-00-1-8852
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > Prospects > View Sales Rep > Buyers > View Sales Management > Manage Buyers & SPECS > Buyer Name When the prospect type code for a prospect/buyer is changed, the new prospect type code and the name of the user who made the change will be recorded and displayed on the prospect/buyer summary screen.
Screenshots:	

Sale Rep History

Date Changed	Changed By	Former Sales Rep
There is no prior sales rep history for this prospect.		

Prospect Type Code History

Date Changed	Changed By	Prospect Type Code
05/09/2012	Brodrick John	2-B (6 months+)

Email History

Date Sent	To	Subject
03/03/2012		Low interest rates available for a limited time

Capture and display of details when a lot's activity list is updated by a change order

Defect #:	001-00-1-9326																																			
Ticket #:																																				
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead																																			
Description:	Project Management > Lot Matrix > CO > Update Activity List link Project Management > Lot Matrix > CO > View When the 'Update Activity List' link is clicked for a change order, the date and the name of the user who clicked the link will be captured. These details will be shown on the change order view screen in Project Management.																																			
Screenshots:	<p>Home > Amber Hills Phase II: Project Management</p> <table border="1"> <tr> <td style="background-color: #f00; color: white; text-align: center;">Lot Matrix</td> <td style="background-color: #ccc; text-align: center;">Purchase Orders</td> <td style="background-color: #ccc; text-align: center;">Trade Partners</td> </tr> </table> <p>Change Order Details for CO # 1001 for Lot 01/001.B, Back</p> <table border="1"> <thead> <tr> <th>C.O.#</th> <th>Status</th> <th>Created By</th> <th>Created Date</th> <th>Approved By</th> <th>Approval Date</th> <th>Activity List Updated By</th> <th>Activity List Updated Date</th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Accepted</td> <td>John Brodrick</td> <td>03/16/2007</td> <td>John Brodrick</td> <td>03/16/2007</td> <td>John Brodrick</td> <td>05/09/2012</td> </tr> </tbody> </table> <p>Comments</p> <p>test ok</p> <table border="1"> <thead> <tr> <th>Option Code</th> <th>Original Information</th> <th>Requested Change</th> <th></th> </tr> </thead> <tbody> <tr> <td>70824 AMHERST TV CAB W/GLASS SHELIVING</td> <td></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td></td> <td style="text-align: center;">Quantity: 0</td> <td style="text-align: center;">1</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;">Selection Notes:</td> <td style="text-align: center;">Added to SPEC via CO 1001</td> <td></td> </tr> </tbody> </table>	Lot Matrix	Purchase Orders	Trade Partners	C.O.#	Status	Created By	Created Date	Approved By	Approval Date	Activity List Updated By	Activity List Updated Date	1001	Accepted	John Brodrick	03/16/2007	John Brodrick	03/16/2007	John Brodrick	05/09/2012	Option Code	Original Information	Requested Change		70824 AMHERST TV CAB W/GLASS SHELIVING			0		Quantity: 0	1			Selection Notes:	Added to SPEC via CO 1001	
Lot Matrix	Purchase Orders	Trade Partners																																		
C.O.#	Status	Created By	Created Date	Approved By	Approval Date	Activity List Updated By	Activity List Updated Date																													
1001	Accepted	John Brodrick	03/16/2007	John Brodrick	03/16/2007	John Brodrick	05/09/2012																													
Option Code	Original Information	Requested Change																																		
70824 AMHERST TV CAB W/GLASS SHELIVING			0																																	
	Quantity: 0	1																																		
	Selection Notes:	Added to SPEC via CO 1001																																		

Change of the default choice of updating selection notes when updating an activity list with a change order from 'No' to 'Yes'

Defect #:	001-00-1-9325			
Ticket #:				
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead			
Description:	The default choice of updating selection notes on approved purchase orders when updating an activity list with a change order has been changed from 'No' to 'Yes.'			
Screenshots:	<p>Home > Amber Hills Phase II: Project Management > Lot Matrix > Purchase Order</p> <table border="1"> <tr> <td style="background-color: #f00; color: white; text-align: center;">Lot Matrix</td> <td style="background-color: #ccc; text-align: center;">Purchase Orders</td> <td style="background-color: #ccc; text-align: center;">Trade Partners</td> </tr> </table> <p>Purchase Order</p> <p>Lot: 01/001.B Schedule Template: Amber Hills Barlow Original Start Date: 02/15/2006 Plan: B1.P2 Barlow Phase II Sales Status: Sold - SPEC to PA Projected Finish Date: 12/12/2006</p> <p>Options on this Change Order Update Selection Notes on Approved POs? <input checked="" type="radio"/> Yes <input type="radio"/> No Apply Change Order Cancel</p> <p>68154 "36"" 4-PIECE MARBLE F.P. SURROUND #4"</p> <p>Selection Note Change! There were no PO(s) related to this option. PO(s) will contain the new selection notes when generated.</p> <p>B9-99-9600 Fireplace Options There were no activity list lines related to this activity that could be updated. A new activity list line will be added to reflect the changes on this change order. Apply Change Order Cancel</p>	Lot Matrix	Purchase Orders	Trade Partners
Lot Matrix	Purchase Orders	Trade Partners		

Addition of Prospect/Buyer Mortgage Information fields to the Prospect/Buyer Information data set

Defect #:	001-00-1-7486
Ticket #:	001-00-142182
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Reports > On-Demand Reports > New Report > People > Prospect/Buyer Information The 19 fields that show prospect financial information and information about the mortgage company associated to a prospect have been added to the Prospect/Buyer Information data set as the Prospect/Buyer Mortgage Information section.
Screenshots:	<p>Visits Dates</p> <p><input type="checkbox"/> Sales Rep <input type="checkbox"/> Visit Date <input type="checkbox"/> Visit Notes <input type="checkbox"/> Visit Type</p> <p>Sales Rep Change Log</p> <p><input type="checkbox"/> Change Date <input type="checkbox"/> Changed By <input type="checkbox"/> Previous Sales Rep</p> <p>Prospect/Buyer Mortgage Information</p> <p><input type="checkbox"/> Address <input type="checkbox"/> Loan Officer Email <input type="checkbox"/> Loan Processor Email <input type="checkbox"/> Pre-Approval Date <input type="checkbox"/> Address 2 <input type="checkbox"/> Loan Officer Fax <input type="checkbox"/> Loan Processor Phone <input type="checkbox"/> State <input type="checkbox"/> Appraisal Order Date <input type="checkbox"/> Loan Officer Phone <input type="checkbox"/> Mortgage Application Date <input type="checkbox"/> Title Company <input type="checkbox"/> City <input type="checkbox"/> Loan Officer Phone2 <input type="checkbox"/> Mortgage Approval Date <input type="checkbox"/> Zip Code <input type="checkbox"/> Loan Officer <input type="checkbox"/> Loan Processor <input type="checkbox"/> Mortgage Company</p>

Addition of the First Export Audit ID & First Export Date fields to data sets with Purchase Order information

Defect #:	001-00-1-8862
Ticket #:	001-00-148002
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Reports > On-Demand Reports > New Report > Purchasing > Purchase Order Header Reports > On-Demand Reports > New Report > Purchasing > Purchase Order with Line Detail Two new fields, First Export Audit ID & First Export Date, have been added to the Purchase Order Header section of these two data sets above. They show the date and audit id of the first export of an approved purchase order.
Screenshots:	<p>Data Set: Purchase Order Header Go To Step Select Col</p> <p>Purchase Order Header</p> <p><input checked="" type="checkbox"/> Approve Date <input type="checkbox"/> Current Start Date <input type="checkbox"/> Last Modify Date <input type="checkbox"/> PO Tax Amount <input type="checkbox"/> Approve User <input type="checkbox"/> Current Task Status <input type="checkbox"/> Last Modify User <input type="checkbox"/> PO Total Amount <input type="checkbox"/> Comments <input type="checkbox"/> Export Status <input type="checkbox"/> PO Amount <input type="checkbox"/> Phase Name <input type="checkbox"/> Create Date <input type="checkbox"/> First Export Audit ID <input type="checkbox"/> PO Number <input type="checkbox"/> Purchase Order Type <input type="checkbox"/> Create User <input type="checkbox"/> First Export Date <input type="checkbox"/> PO Status <input type="checkbox"/> Task Name <input type="checkbox"/> Current Finish Date</p>

Addition of the Prospect Email Address 2 field to data sets with Prospect/Buyer information

Defect #:	001-00-1-9284
Ticket #:	001-00-149449
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	<p> Reports > On-Demand Reports > New Report > People > Campaign Tasks Reports > On-Demand Reports > New Report > People > Prospect/Buyer Information Reports > On-Demand Reports > New Report > People > Survey Answers Reports > On-Demand Reports > New Report > Purchasing > Activity List Reports > On-Demand Reports > New Report > Purchasing > Activity List w/Schedule Information Reports > On-Demand Reports > New Report > Purchasing > NSOs Reports > On-Demand Reports > New Report > Sales > Change Orders Reports > On-Demand Reports > New Report > Sales > NSOs Reports > On-Demand Reports > New Report > Sales > Sales Agreement Options Reports > On-Demand Reports > New Report > Sales > Sales Agreements Reports > On-Demand Reports > New Report > Sales > Workups Reports > On-Demand Reports > New Report > Sales > Workup Options Reports > On-Demand Reports > New Report > Sales Management > NSOs Reports > On-Demand Reports > New Report > Sales Management > Schedule and Sales Workup Reports > On-Demand Reports > New Report > Sales Management > Workup/Agreement Deposits Reports > On-Demand Reports > New Report > Scheduling > Lot Data Reports > On-Demand Reports > New Report > Scheduling > NSOs </p> <p>The Prospect Email Address 2 field has been added to data sets above that show Prospect/Buyer information.</p>

Screenshots:

Home > Reports > Select Report Columns

Standard Reports
On Demand Reports

Data Set: Prospect\Buyer Information Go To Step Select Columns

Prospect/Buyer Information

<input type="checkbox"/> Address 1	<input type="checkbox"/> Fax Phone	<input type="checkbox"/> Last Name	<input type="checkbox"/> Source
<input type="checkbox"/> Address 2	<input type="checkbox"/> First Name	<input type="checkbox"/> Letter Opt Out	<input type="checkbox"/> State
<input type="checkbox"/> Assigned Sales Rep	<input type="checkbox"/> Full Name	<input type="checkbox"/> Middle Name	<input type="checkbox"/> Status
<input type="checkbox"/> City	<input type="checkbox"/> HBHP Password	<input type="checkbox"/> Mobile Phone	<input type="checkbox"/> Suffix
<input type="checkbox"/> Comments	<input type="checkbox"/> HBHP User Name	<input type="checkbox"/> Phone Opt Out	<input type="checkbox"/> Total Visits
<input type="checkbox"/> Email	<input type="checkbox"/> Home Phone	<input type="checkbox"/> Prefix	<input type="checkbox"/> Work Phone
<input checked="" type="checkbox"/> Email 2	<input type="checkbox"/> Initial Visit Date	<input type="checkbox"/> Primary Contact	<input type="checkbox"/> Work Phone Ext
<input type="checkbox"/> Email Opt Out	<input type="checkbox"/> Is Buyer	<input type="checkbox"/> Prospect Type	<input type="checkbox"/> Zip
<input type="checkbox"/> Entry Date			

Updates to pages to show Lot Address where possible

Defect #:	001-00-1-9063, 001-00-1-9064, 001-00-1-9065, 001-00-1-9066, 001-00-1-9068, 001-00-1-9069, 001-00-1-9071, 001-00-1-9073, 001-00-1-9074, 001-00-1-9075, 001-00-1-9077, 001-00-1-9078
Ticket #:	001-00-149055, 001-00-149056, 001-00-149058, 001-00-149059, 001-00-149060, 001-00-149086, 001-00-149087, 001-00-149091
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	<p>The screens below were updated to show lot addresses:</p> <ul style="list-style-type: none"> - Sales Rep > Buyers - Sales Management > Manage Buyers & SPECS - NSO > Estimate List - NSO > NSO List - NSO > Lot Matrix > NSO() link for a lot - NSO > Archive search results - Sales Rep > SPEC List > CO & Sales Rep > SPEC List > CO > View - Sales Rep > Buyers > CO & Sales Rep > Buyers > CO > View - Sales Management > Manage Buyers & SPECS > CO & Sales Management > Manage Buyers & SPECS > CO > View - Project Management > Lot Matrix > CO & Project Management > Lot Matrix > CO > View - Sales Rep > Prospects > Workups - Sales Rep > Buyers > Agreement... - Admin > Projects > Lots > View & Admin > Projects > Lots > Edit - Project Management > Lot Matrix > View & Project Management > Lot Matrix > Edit - Sales Management > Lot Matrix > View & Sales Management > Lot Matrix > Edit - Sales Rep > Lot List > View

Formatting Updates to Job Cost Reports, Projected Profitability Reports

Defect #:	001-00-1-8831, 001-00-9105
Ticket #:	001-00-147503, 001-00-148835
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>The formatting of the following reports has been updated to show a more detailed breakdown of the Total Purchase Price. At the end of the report there is now analysis against the Retail Price before adjustments (Addenda, Incentives, and Differential), and Total Price including all adjustments.</p> <ul style="list-style-type: none"> - Job Cost Report (Lot Detail) - Job Cost Report (Lot Detail - Profit) - Job Cost Report (Lot Summary) - Job Cost Report (Lot Summary - Profit) - Job Cost Report (Lot Summary) - Job Cost Report (Lot Summary) Breakout - Job Cost Report (Lot Summary) Breakout (Option/NSO) - Projected Lot Profitability Detail - Projected Lot Profitability Summary - Projected Lot Profitability Summary – Standard Options

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>Issue with the pre-con schedule create date and status fields on scheduling data sets</i>	
Defect #:	001-00-1-8841
Ticket #:	001-00-147911
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Reports > On-Demand Reports > New Report > Scheduling > Lot Data Reports > On-Demand Reports > New Report > Scheduling > Lot Data (including Pre and Construction schedules) Reports > On-Demand Reports > New Report > Scheduling > Scheduling Phases Reports > On-Demand Reports > New Report > Scheduling > Scheduling Tasks</p> <p>The pre-construction schedule create date and status was not being shown in the data sets above. This has been corrected.</p>

<i>Issue with status of terminated buyers who are sent back to the prospects list</i>	
Defect #:	001-00-1-8872
Ticket #:	001-00-148212, 001-00-148530
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Sales Management > Manage Buyers & SPECs > Terminated Buyers > Delete</p> <p>When terminated agreements were deleted and the terminated buyers were sent back to the prospects lists in Sales Rep, the prospect status was always set to 'New Prospect.'</p> <p>This has been updated so that if the prospect has other available workups their status is set to 'Pricing Houses.'</p>

<i>Calculation of taxes of the edit screens of turnkey bids and contracts in Trade Partner accounts</i>	
Defect #:	001-00-1-8905
Ticket #:	001-00-147921, 001-00-147922
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Trade Partner account > Bids > Turnkey > Edit Trade Partner account > Contracts > Turnkey > Edit</p> <p>When a trade partner edits a turnkey bid or contract they enter a pre-tax amount. When they click save tax should be calculated for activities marked as taxable. In some cases the tax was not incorporated. This has been corrected to ensure that if an activity is marked as taxable tax is always factored into the price.</p>

Issue with association of archived projects to documents

Defect #:	001-00-1-8932
Ticket #:	001-00-148708
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Documents > Profile > Associate/Unassociate Projects When trying to associate or un-associate projects from a document archived projects were shown. Archived projects are no longer shown on the projects list.

Error message when trying to delete options from additional plans

Defect #:	001-00-1-8999
Ticket #:	001-00-148826
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	In some cases an error message was shown when deleting option and the 'Delete and Delete from additional plans' button was clicked. This has been corrected to delete the options from the plans where there are no restrictions, and show the plans where the option could not be deleted because it has been selected.

Revision of the NSO count for lots on the NSO > Lot Matrix screen

Defect #:	001-00-1-9154
Ticket #:	001-00-149071
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	NSO > Lot Matrix In some cases the number of NSOs on for a lot shown on the NSO list was 1 instead of 0. This issue has been corrected.

Recognition of the @@project_complete_address@@ tag

Defect #:	001-00-1-9306
Ticket #:	001-00-149488
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	The @@project_address_tag@@ was not being recognized when generating tagged documents. This has been corrected.

Difference in the amount of cents shown by the @@total_price_with_gst@@ and @@total_price_with_gst_text@@ tags

Defect #:	001-00-1-9307
Ticket #:	001-00-149509
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	The amounts of cents shown when using the @@total_price_with_gst@@ and @@total_price_with_gst_text@@ tags was different by one cent in some cases. This has been corrected.

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 Support Desk.

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

- Improve user interface/workflow in the sales modules
- Improve workups functionality
- Improve incentives functionality
- Add more permissions to sales roles