CONSTELLATION
HomeBuilder Systems

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

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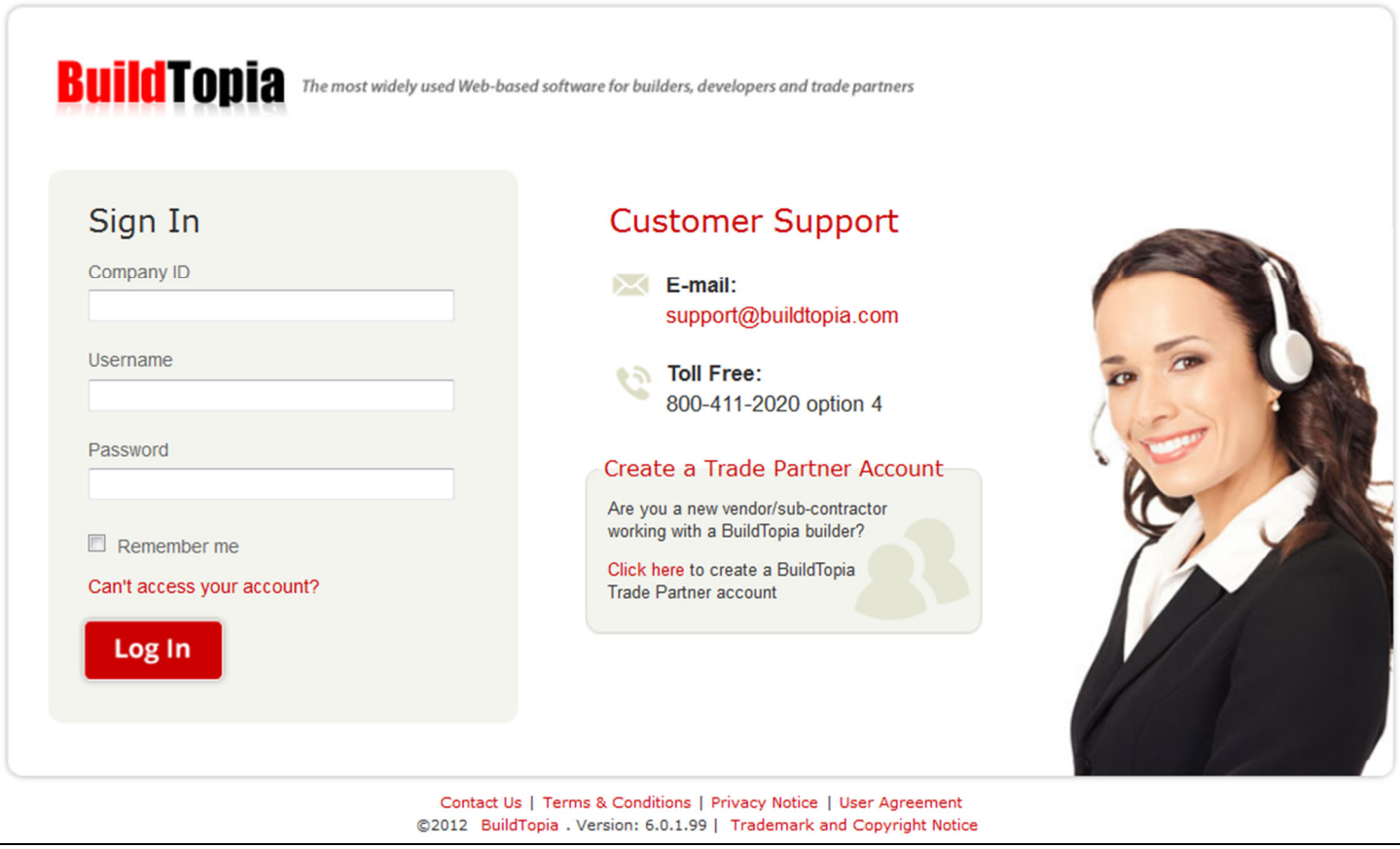
Enhancements

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 #:	
	☒ BTBuilder ☒ BTSales ☒ BTService ☒ 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:	



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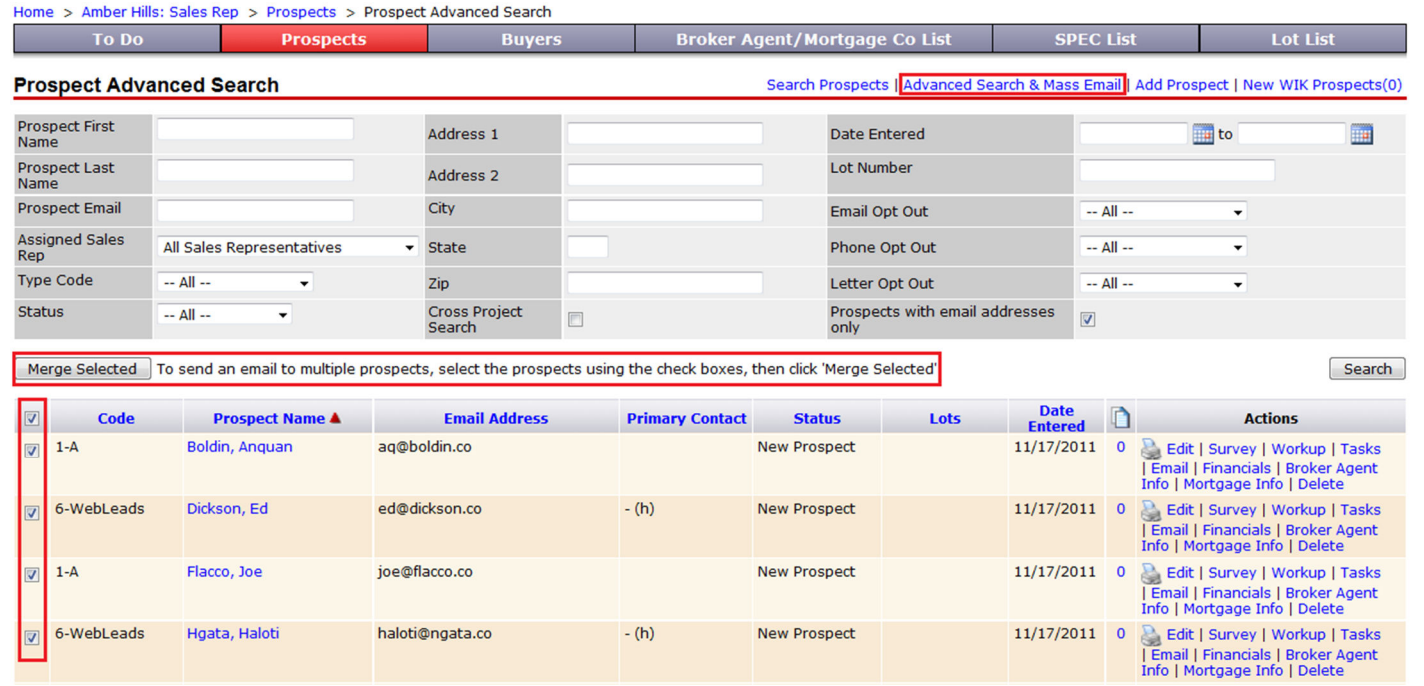
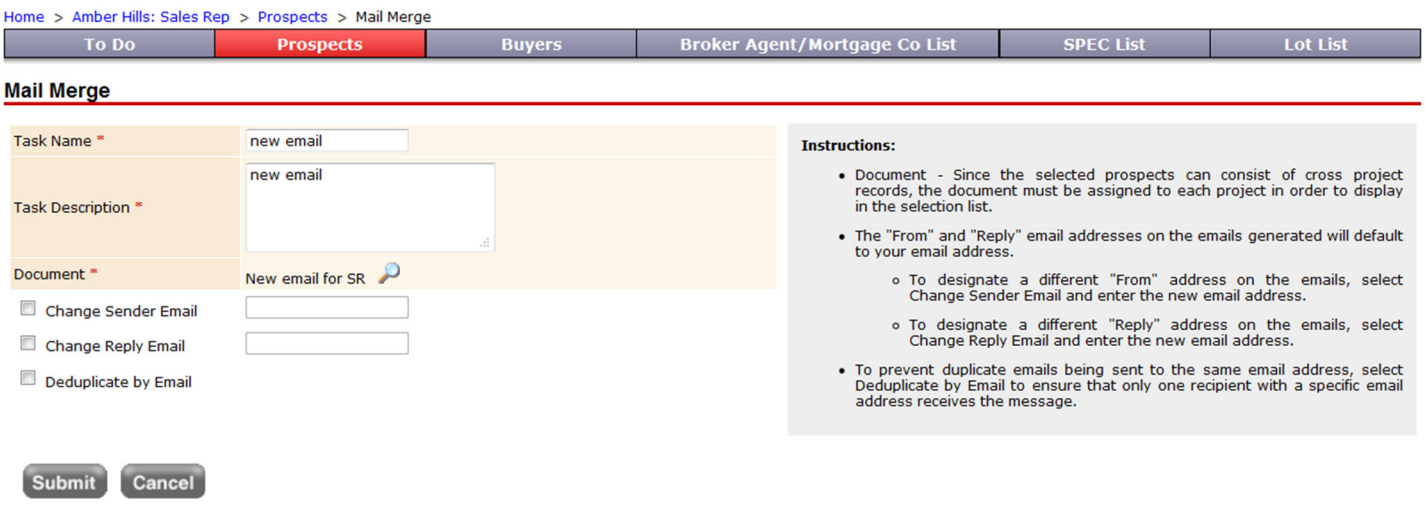
Simpler way to send mass email to prospects

Defect #:	001-00-1-8727
Ticket #:	001-00-148569
	☒ BTBuilder ☒ BTSales ☐ BTService ☒ BTLead
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:	





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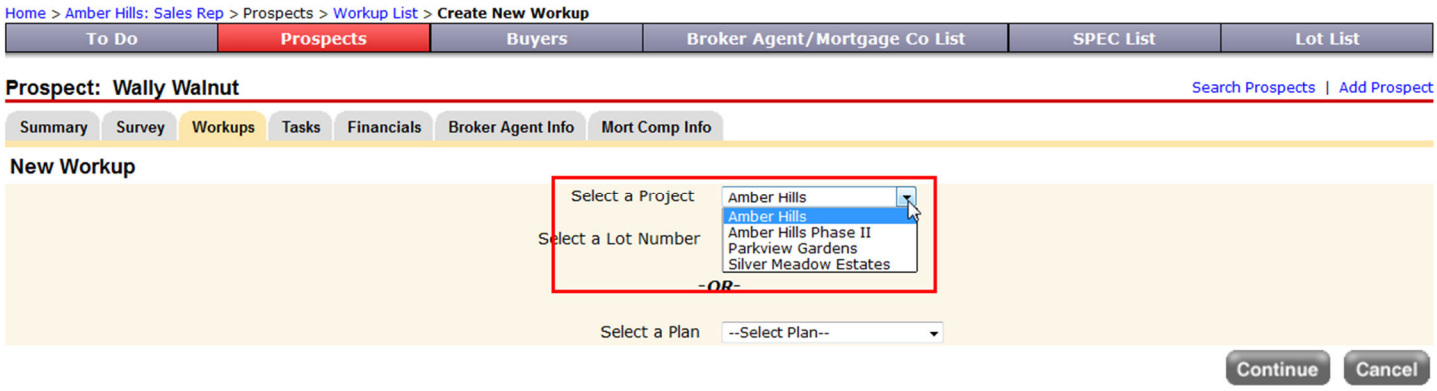
Ability to create workups in projects other than the project the prospect is associated to

Defect #:	001-00-1-8762
Ticket #:	001-00-149089
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ 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
	☒ BTBuilder ☐ BTSales ☐ BTService ☐ 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:	

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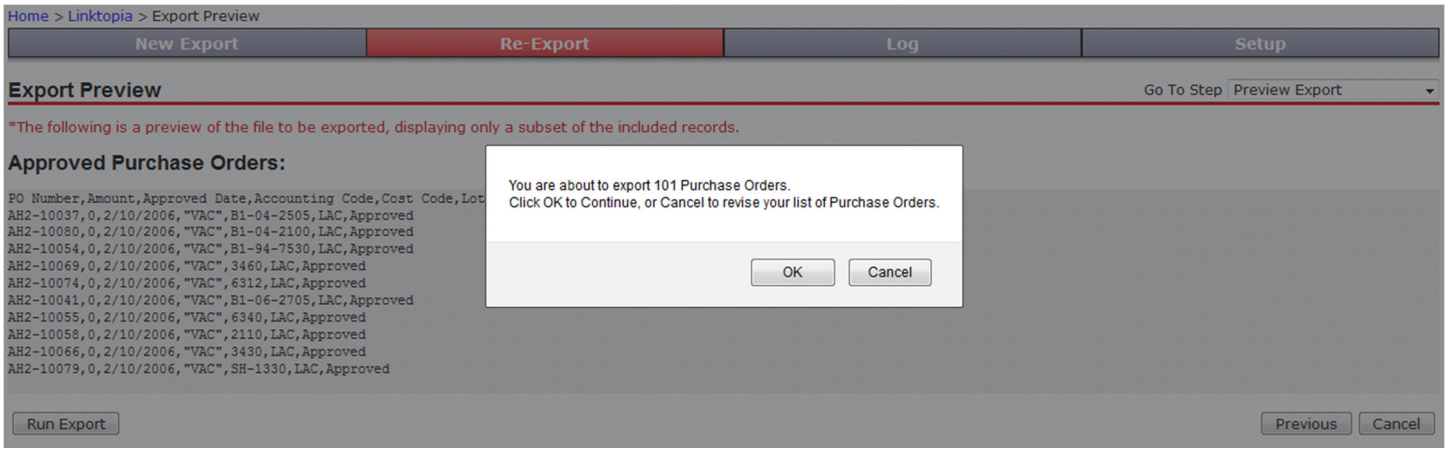

Capture and display prospect type code history

Defect #:	001-00-1-8852
Ticket #:	
	☒ BTBuilder ☒ BTSales ☐ BTService ☒ BTLead
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

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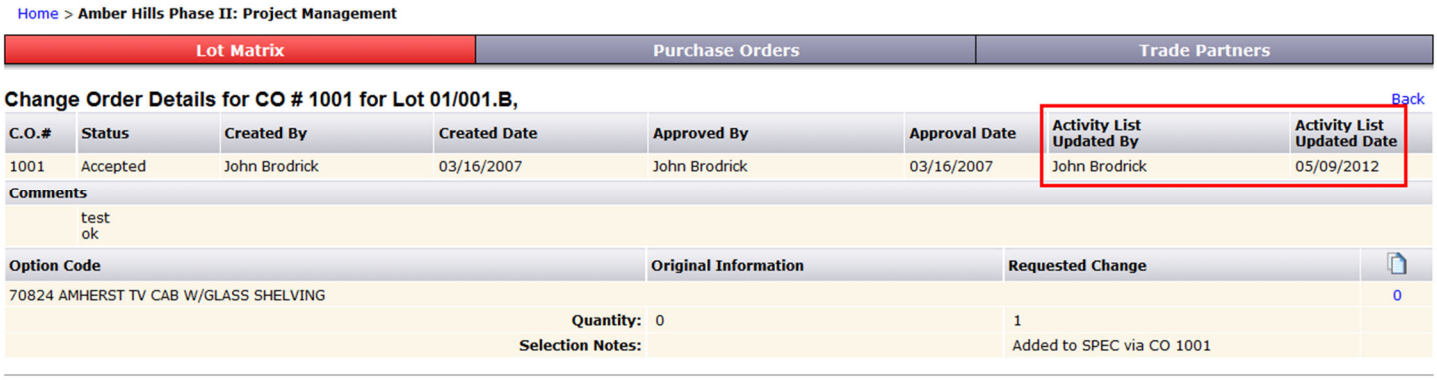
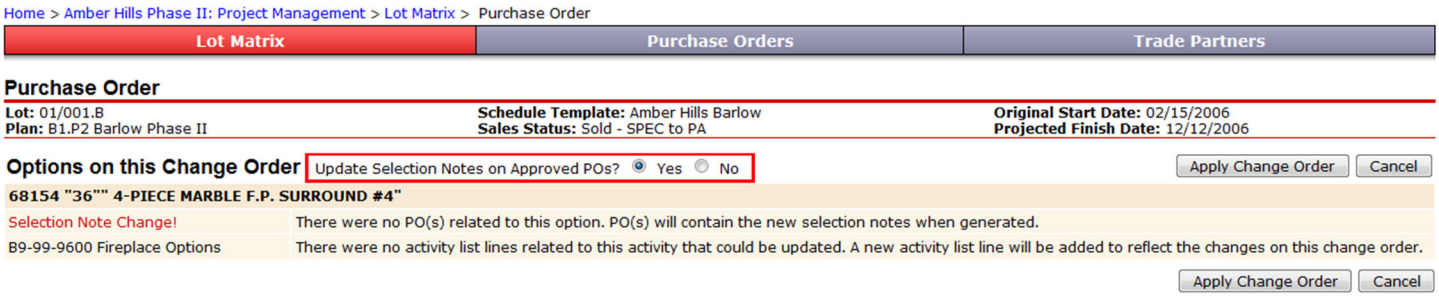
Capture and display of details when a lot's activity list is updated by a change order

Defect #:	001-00-1-9326
Ticket #:	
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ 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:	



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 #:	
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ 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:	



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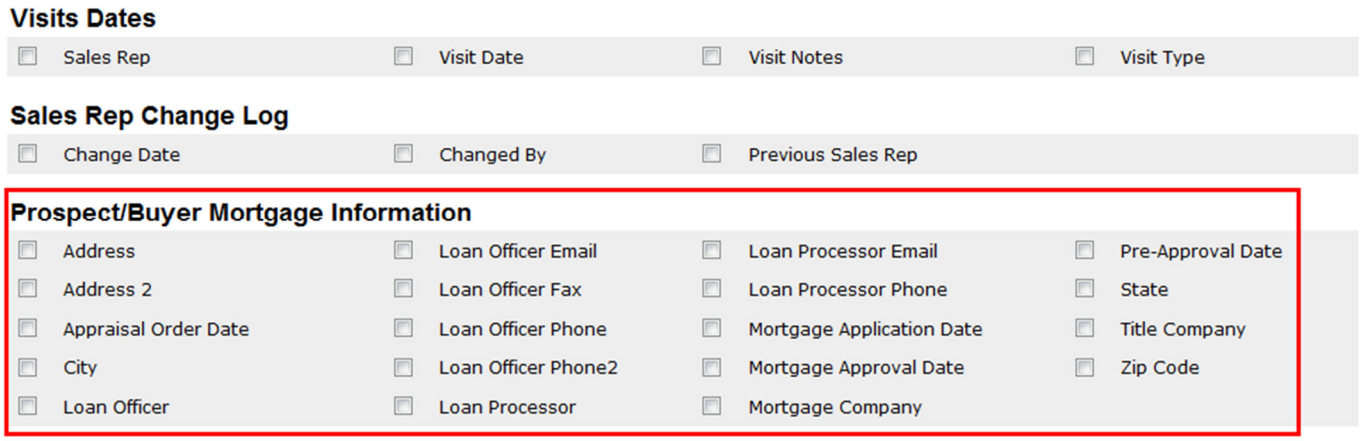
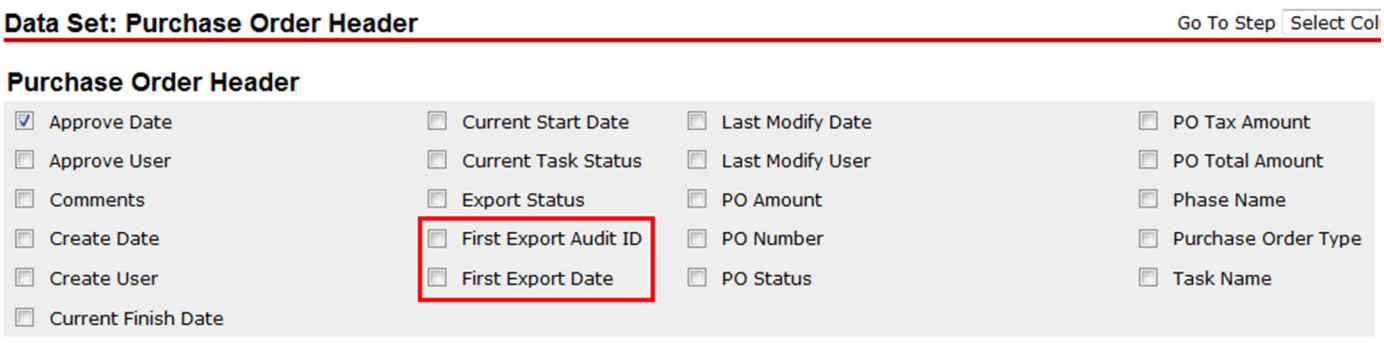
Addition of Prospect/Buyer Mortgage Information fields to the Prospect/Buyer Information data set

Defect #:	001-00-1-7486
Ticket #:	001-00-142182
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ 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:	



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
	☒ BTBuilder ☐ BTSales ☐ BTService ☐ 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:	



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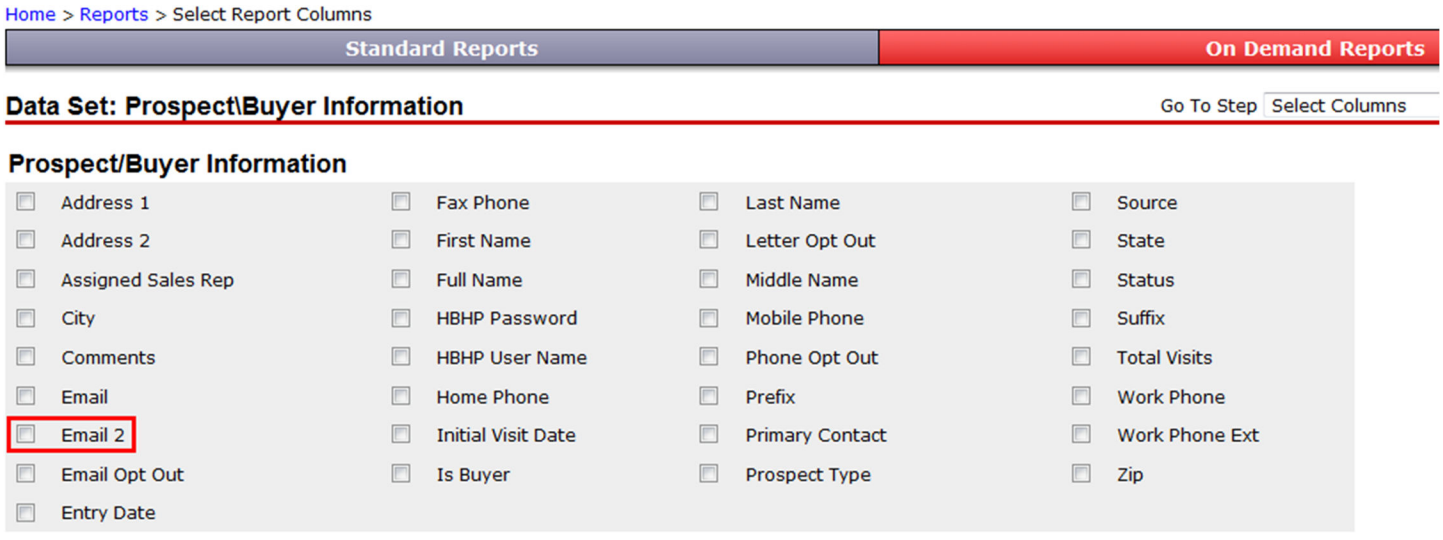
Addition of the Prospect Email Address 2 field to data sets with Prospect/Buyer information

Defect #:	001-00-1-9284
Ticket #:	001-00-149449
	☒ BTBuilder ☒ BTSales ☐ BTService ☒ BTLead
Description:	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 The Prospect Email Address 2 field has been added to data sets above that show Prospect/Buyer information.
Screenshots:	



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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
	☒ BTBuilder ☒ BTSales ☐ BTService ☒ BTLead
Description:	The screens below were updated to show lot addresses: - 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
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ BTLead
Description:	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. - 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

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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.

Issue with the pre-con schedule create date and status fields on scheduling data sets	
Defect #:	001-00-1-8841
Ticket #:	001-00-147911
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ BTLead
Description:	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 The pre-construction schedule create date and status was not being shown in the data sets above. This has been corrected.

Issue with status of terminated buyers who are sent back to the prospects list	
Defect #:	001-00-1-8872
Ticket #:	001-00-148212, 001-00-148530
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ BTLead
Description:	Sales Management > Manage Buyers & SPECs > Terminated Buyers > Delete 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.' This has been updated so that if the prospect has other available workups their status is set to 'Pricing Houses.'

Calculation of taxes of the edit screens of turnkey bids and contracts in Trade Partner accounts	
Defect #:	001-00-1-8905
Ticket #:	001-00-147921, 001-00-147922
	☒ BTBuilder ☐ BTSales ☐ BTService ☐ BTLead
Description:	Trade Partner account > Bids > Turnkey > Edit Trade Partner account > Contracts > Turnkey > Edit 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.

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Issue with association of archived projects to documents	
Defect #:	001-00-1-8932
Ticket #:	001-00-148708
	☒ BTBuilder ☒ BTSales ☒ BTService ☒ BTLead
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
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ BTLead
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
	☒ BTBuilder ☒ BTSales ☐ BTService ☒ BTLead
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
	☒ BTBuilder ☒ BTSales ☒ BTService ☒ BTLead
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
	☒ BTBuilder ☒ BTSales ☐ BTService ☐ BTLead
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.

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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

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