



BuildTopia

Version 6.1.0

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>

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.

Revised login page, ability to login with email address and password

Defect #: 001-00-1-8882

Ticket #:

BTBuilder BTSales BTService BTLead

Description: The login page has been updated to allow users to login with their email address and password only. A link to the older login method (company ID, username & password) is shown if there is an error when trying to login. Please note that every user must have a unique email address to use the new login method. The email address can be updated by clicking on the 'My Profile' link at the top right corner.

Screenshots:

Updated color scheme

Defect #:	001-00-1-9674
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	The default BuildTopia color scheme has been updated. The main goal was to improve visibility of information and links on screens. Back end improvements were also done to prepare for future user interface updates.

New Sales permission to restrict access to their prospects and tasks only

Defect #:	001-00-1-8742
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Admin > Company Setup > Sales Roles > View/Edit A new permission has been added to the Sales permission roles called 'View Prospects and Tasks assigned to the User Only.' Users who have a permission role that includes this permission will only be able to see prospects and tasks assigned to them in the Sales Rep Module.
Screenshots:	

Home > Admin > Edit Sale Role

Projects	Users	Imports	Company/Acct Info	Company Setup	BService Setup
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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
- User Custom Fields

Sales

Role name *

* Required

Permissions

Sales Rep

- Sales Rep Read Only
- Sales Rep Read/Write
- Reschedule Tasks
- Send Mass emails via Advanced Prospect Search
- View Prospects and Tasks assigned to the User Only

Sales Messages

- Release to Production Request
- Option Pricing Updated
- Agreement Submitted
- Sales Manager Response to Offer
- New Change Order Submitted
- Change Order Response

Check the permissions that this role should have

Sales Manager

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

Check the messages that users with this role should receive

- Sales Agreement Terminated
- Plan Pricing Updated

Addition of Save and Flowdown functionality to option activities at the Data Library > Options level

Defect #:	001-00-1-9524
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Data Library > Options > Edit > Edit Activities Updates to the Quantity, Scope of Work, and Status of activities on options at the Data Library>Options level can now be 'flowed-down' to activities for the same option on plans.
Screenshots:	

Home > Data Library > Options > Edit Option Activities

Plans	Activities	Options	Template Budgets	Schedules
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Edit Option Activities

Option #: 00000 Option Name: Testing Option Activity Option Category: Electrical

Check the boxes of the activities where changes should be saved

Activities Save Save & Flowdown Cancel

Activity Package	Activity Code	Qty.	Scope of Work	Status
<input type="checkbox"/>	00001 Surveying	10.0 (HR)	Surveying	<input checked="" type="radio"/> Active <input type="radio"/> Archived
<input type="checkbox"/>	001a Testing Option Activity	1.0 (TK)	test	<input checked="" type="radio"/> Active <input type="radio"/> Archived
<input type="checkbox"/>	0001 HP Non-Draw Activity Package	20.0 (GAL)	0002UM new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived
<input type="checkbox"/>	0001 HP Non-Draw Activity Package	1.0 (TK)	001a new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived
<input type="checkbox"/>	0001 HP Non-Draw Activity Package	10.0 (HR)	100 new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived

Save Save & Flowdown Cancel

Home > Data Library > Options > Option Activity Management

Plans	Activities	Options	Template Budgets	Schedules
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Option Activity Management

Option Successfully Updated

Option #: 00000 Option Name: Testing Option Activity Option Category: Electrical

Updated Activities

Activity Package	Activity Code	Qty.(UM)	Scope of Work	Trade	Status
	00001 Surveying	10.0 (HR)	Surveying	01 General Conditions	Active
	001a Testing Option Activity	1.0 (TK)	test	Electrical	Active
0001 HP Non-Draw Activity Package	0002UM test UM	20.0 (GAL)	0002UM new scope of work	0002 test trade	Active
0001 HP Non-Draw Activity Package	001a Testing Option Activity	1.0 (TK)	001a new scope of work	Electrical	Active
0001 HP Non-Draw Activity Package	100 New Activity Name	10.0 (HR)	100 new scope of work	01 Appliance Supplier	Active

Back Update Selected Update Selected & Exit Exit

Plan Options Plan Status: All Option Status: All

Search:

Plan	Plan Description	Plan Status	Option Status
<input type="checkbox"/>	DES ~ DD Project	Active	Available
<input type="checkbox"/>	Test Amber Hills	Active	Available
<input type="checkbox"/>	B1.P2 Barlow Phase II Amber Hills Phase II	Active	Available
<input type="checkbox"/>	C1 Charleston Amber Hills	Active	Available
<input type="checkbox"/>	C1.P2 Charleston Phase II Amber Hills Phase II	Active	Available

5 Plan Option Codes listed. 50 Plan Option Codes per page

Addition of Save and Flowdown functionality to activity package activities at the Data Library > Activities > Activity Package level

Defect #:	001-00-1-9194
Ticket #:	001-00-149231
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Data Library > Activities > Activity Packages > Edit > Edit Activities Updates to the Quantity, Scope of Work, and Status of activities on options at the Data Library>Activities>Activity Package level can now be 'flowed-down' to activities for the same activity package on options, plans, and plan options.
Screenshots:	

Home > Data Library > Activities > Edit Activity Package Activities

Plans	Activities	Options	Template Budgets	Schedules
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Edit Activity Package Activities

Package #: 0001 HP Package Name: Non-Draw Activity Package

Check the boxes of the activities where changes should be saved

Activities				Save	Save & Flowdown	Cancel
<input type="checkbox"/>	Activity Code	Qty.	Scope of Work	Status		
<input type="checkbox"/>	0002UM test UM	30.0 (GAL)	0002UM new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived		
<input type="checkbox"/>	001a Testing Option Activity	1.0 (TK)	001a new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived		
<input type="checkbox"/>	100 New Activity Name	10.0 (HR)	100 new scope of work	<input checked="" type="radio"/> Active <input type="radio"/> Archived		

Home > Data Library > Activities > Activity Package Management

Plans	Activities	Options	Template Budgets	Schedules
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Activity Package Management

Package #: 0001 HP Package Name: Non-Draw Activity Package

Updated Activities

Activity Code	Qty.	Scope of Work	Trade	Status
0002UM test UM	30.0 (GAL)	0002UM new scope of work	0002 test trade	Active
001a Testing Option Activity	1.0 (TK)	001a new scope of work	Electrical	Active
100 New Activity Name	10.0 (HR)	100 new scope of work	01 Appliance Supplier	Active

Back Update Selected Update Selected & Continue Next Exit

Options			
Search:	Option Code ▲	Description	Status
	00000 Testing Option Activity	testing 5367F	Available
	001 Custom Revision #1	Test-djibril asdsfd	Available
	22222 ADD MOTION DETECTOR	Testing Linktopia for TOMS	Available
	27003 BA7030 - OFFICE PREWIRE TAP		Available

4 Options listed.

50 Options per page

Activity Package Management

Package #: 0001 HP Package Name: Non-Draw Activity Package

Updated Activities

Activity Code	Qty.	Scope of Work	Trade	Status
0002UM test UM	30.0 (GAL)	0002UM new scope of work	0002 test trade	Active
001a Testing Option Activity	1.0 (TK)	001a new scope of work	Electrical	Active
100 New Activity Name	10.0 (HR)	100 new scope of work	01 Appliance Supplier	Active

Back Update Selected Update Selected & Continue Next Exit

Plans

Search: Status: All

Plan	Description	Status
<input type="checkbox"/> DES	~ DD Project	Active
<input type="checkbox"/> A1 Abbington	Amber Hills	Active
<input type="checkbox"/> A1.P2 Abbington Phase II	Amber Hills Phase II	Active
<input type="checkbox"/> B1.P2 Barlow Phase II	Amber Hills Phase II	Active
<input type="checkbox"/> C1.P2 Charleston Phase II	Amber Hills Phase II	Active

5 Plans listed. 50 Plans per page

Activity Package Management

Package #: 0001 HP Package Name: Non-Draw Activity Package

Updated Activities

Activity Code	Qty.	Scope of Work	Trade	Status
0002UM test UM	30.0 (GAL)	0002UM new scope of work	0002 test trade	Active
001a Testing Option Activity	1.0 (TK)	001a new scope of work	Electrical	Active
100 New Activity Name	10.0 (HR)	100 new scope of work	01 Appliance Supplier	Active

Back Update Selected Update Selected & Exit Exit

Plan Options

Search: Plan Status: All Option Status: All

Plan	Option	Plan Status	Option Status
<input type="checkbox"/> DES	00000 Testing Option Activity	Active	Available
<input type="checkbox"/> New Carrollton	001 Custom Revision #1	Active	Available
<input type="checkbox"/> Robertson	001 Custom Revision #1	Active	Available
<input type="checkbox"/> Test	00000 Testing Option Activity	Active	Available
<input type="checkbox"/> Test	22222 ADD MOTION DETECTOR	Active	Available
<input type="checkbox"/> Test	001 Custom Revision #1	Active	Available

Ability to use activity packages on NSO estimates

Defect #:	001-00-1-8610
Ticket #:	001-00-147459
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	NSO > Lot Matrix > NSOs (for a lot) > Manage > Estimate Updates were made to the NSO functionality and several pages to allow activity packages to be included on NSO estimates. Once the activity package is added to the NSO estimate the activities can edited or removed independently.
Screenshots:	

Home > NSO: Lot Matrix > NSO List > View NSO > View NSO Estimate

[Exit NSO Module](#)

Lot Matrix	NSO List	Estimate List	Archive	Project: Amber Hills
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View Estimate for NSO #: 5

[Add Activities](#) |
 [Add Activity Packages](#) |
 [Complete](#) |
 [Send](#) |
 [Documents \(0\)](#) |
 [Back](#)

Prospect/Buyer: Donald Duck NSO Number: 5 Origin: Buyer	Project: Amber Hills Lot/Address: 05 / 568 Market Ridge Rd Plan: A1 Abbington	Created By: R Phillips on 09/21/2005 Modified By: Amos Odenyo on 06/28/2012 Approved By: Nathaniel Singletary on 06/08/2006
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NSO Information

NSO Status	Released
Requested Description	another test
Quoted Description	ok

Estimate Information [Edit](#)

Estimate Status	Open	Created By	BuildTopia On Demand on 05/15/2006
Option Code	Not Specified	Modified By	Amos Odenyo on 06/29/2012
Estimate Name	new est		
Description	test		

[Activity Codes](#) |
 [Documents](#) |
 [History](#) |
 [Quotes](#)

Activity Code	Activity Package	Trade	Qty	Unit Budget	Unit Price	Tax Rate	Total
0002UM - test UM	0001 HP Non-Draw Activity Package	0002 - test trade	30.0 (GAL)	\$10.00	\$11.00	0.0%	\$330.00
Trade Partner	BuildTopia Test Subcontractor						
Purchase Order Number							
Scope of Work							
001a - Testing Option Activity	0001 HP Non-Draw Activity Package	Electrical	1.0 (TK)	\$15.00	\$16.00	0.0%	\$16.00
Trade Partner	BuildTopia Test Subcontractor						
Purchase Order Number							
Scope of Work	test						
1-01-150 - Structural Design	0001 Draw Test Draw Package	PRELIMINARY/SITE PREP	1.0 (TK)	\$20.00	\$21.00	0.0%	\$21.00
Trade Partner	BuildTopia Test Subcontractor						
Purchase Order Number							
Scope of Work							

Ability to void purchase orders that are approved but have not been exported when terminating NSOs

Defect #:	001-00-1-9495
Ticket #:	001-00-150045
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	NSO > Lot Matrix > NSOs (for a lot) > Manage > Termination Requested (Decision) When terminating a NSO, purchase orders (POs) that are tied to that NSO are presented. The user has the option to void open POs, and with this release, approved POs that have not yet been exported via linktopia.
Screenshots:	

Home > NSO: Lot Matrix > NSO List > View NSO > Termination Decision...

Exit NSO Module

Lot Matrix	NSO List	Estimate List	Archive	Project: Amber Hills
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Termination Decision for NSO #: 11

Prospect/Buyer: Donald Duck	Project: Amber Hills	Created By: Amos Odenyo on 07/02/2012
NSO Number: 11	Lot/Address: 05 / 568 Market Ridge Rd	Modified By: Amos Odenyo on 07/02/2012
Origin: Buyer	Plan: A1 Abbington	Approved By: Amos Odenyo on 07/02/2012

Comments * * Required

Purchase Orders
Void Selected POs

	<input type="checkbox"/>	PO #	Lot #	Trade Partner	Status ▼	Create Date	Total Amount	
▶	<input type="checkbox"/>	AH-10720	05	BuildTopia Test Subcontractor	Open	07/02/2012	\$330.00	0
▶	<input type="checkbox"/>	AH-10718	05	BuildTopia Test Subcontractor	Open	07/02/2012	\$16.00	0
▶	<input type="checkbox"/>	AH-10723	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$41.00	0
▶	<input type="checkbox"/>	AH-10722	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$15.00	0
▶	<input type="checkbox"/>	AH-10721	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$46.00	0
▶	<input type="checkbox"/>	AH-10719	05	Joe's Foundations	Approved	07/02/2012	\$0.00	0
▶	<input type="checkbox"/>	AH-10717	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$21.00	0
▶	<input type="checkbox"/>	AH-10716	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$26.00	0
▶	<input type="checkbox"/>	AH-10715	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$31.00	0
▶	<input type="checkbox"/>	AH-10714	05	BuildTopia Test Subcontractor	Approved	07/02/2012	\$36.00	0

10 POs listed.

50 POs per page

Ability to update the Custom Lot Number on lots that are Settled but not Completed

Defect #:	001-00-1-9536
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Admin > Projects > Project Settings The 'Custom Lot Number Editable on Sold Lots' project setting has been modified to apply to settled lots as well, so long as their construction status is not 'Completed.' This gives users the ability to correct the lot number without contacting customer support.
Screenshots:	

Home > Admin > Projects > Manage Project Settings

Projects	Users	Imports	Company/Acct Info	Company Setup	BTService Setup
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Manage Project Settings for Amber Hills

[Project List](#)

Project Settings

- Custom Lot Number
- Webkit Prospect Form
- Webkit XML
- Custom Footers
- Builder Incentives
- Financial Setup
- Homebuyer Homepage

Project Settings	
Use Address on Report/Print Forms	Project ▾
Warranty Package for Project	Standard 1 Yr warranty ▾
Change Order Deposit Required	Yes ▾ minimum of 50 % or \$ 0.0 required.
Custom Lot Number Editable on Sold and Settled Lots	Yes ▾
Prompt for Payment Approval upon Completion of Scheduling Tasks	Show all POs related to the task ▾
Prompt for Payment Approval upon Completion of Phase	Yes ▾
Allow the activity list to be modified	Yes ▾
Project Default Tax Rate	5.0
System Generated PO Prefix	AH-
Manual PO Prefix	AHM-
Core Lot Price	500000

New print form that shows all approved purchase orders included in a linktopia export log

Defect #:	001-00-1-9344
Ticket #:	001-00-149478
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Accounting > Log > Print Icon > Approved POs by Audit A new print form has been added to the accounting log section. The form shows all the approved purchase orders that were included in the selected Audit #. Each purchase order begins on a new page.
Screenshots:	

Home > Linktopia > Export Logs

New Export	Re-Export	Log	Setup	
New Exports Re-Exports Search: <input type="text"/> Projects: -- All --				
Audit Number	Export Date	Project Exported	Total Records Exported	Action
▶ 113442	07/02/2012	Amber Hills	4	<input checked="" type="checkbox"/> Approved POs by Audit <input type="checkbox"/>
▶ 113441	06/26/2012	Amber Hills	1	<input checked="" type="checkbox"/> <input type="checkbox"/>
▶ 113392	01/05/2012	All Projects	1	<input checked="" type="checkbox"/> <input type="checkbox"/>
▶ 113391	01/05/2012	Amber Hills	1	<input checked="" type="checkbox"/> <input type="checkbox"/>

Display of the 'Update selection notes on approved options' setting when applying a change order only when there are approved purchase orders affected by the selection note changes

Defect #:	001-00-1-9354
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Project Management > Lot Matrix > COs > Update Activity List When updating an activity list with a change order the following setting is always shown 'Update Selection Notes on Approved POs? Yes/No.' This feature has been updated so that the setting is shown only when there are approved Purchase Orders that would be affected by the option selection note changes.
Screenshots:	

Home > Amber Hills: Project Management > Lot Matrix > Purchase Order

Lot Matrix	Purchase Orders	Trade Partners
Purchase Order Lot: 104 Schedule Template: 01.My Custom Project My Custom House Original Start Date: 04/26/2012 Plan: A1 Abbington Sales Status: Sold Projected Finish Date: 09/12/2012		
Options on this Change Order Update Selection Notes on Approved POs? <input checked="" type="radio"/> Yes <input type="radio"/> No		
12345 * Bay Window test		
Selection Note Change! The following APPROVED PO(s) related to this option will NOT have the option selection notes updated by default: AH-10692;		
4510 Windows	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.	
02.0001 Framing	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.	
000001 Surveying	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.	
0001UM test UM	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.	

Usability updates to pages

Defect #:	001-00-1-9224, 001-00-1-9225, 001-00-1-9226, 001-00-1-9227, 001-00-1-9525, 001-00-1-9526, 001-00-1-9527, 001-00-1-9528, 001-00-1-9529, 001-00-1-9530, 001-00-1-9531, 001-00-1-9565, 001-00-1-9566, 001-00-1-9567, 001-00-1-9568, 001-00-1-9569, 001-00-1-9571, 001-00-1-9572, 001-00-1-9573, 001-00-1-9574, 001-00-1-9575, 001-00-1-9576, 001-00-1-9677
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	<p>A number of pages were updated with changes to improve their usability.</p> <ul style="list-style-type: none">• A status column and filter was added to the following pages: Options>Add Activities, Options>Add Activity Packages, Activity Packages>Add Activities, Plans>Add Activities, Plans>Add Activity Packages, Plans>Add Activities>Add to Additional Plans, Plans>Add Activity Packages>Add to Additional Plans, Plans>Add Options>Add to Additional Plans, NSO>Estimate>Add Activity• Addition of the project name to the title on the following pages: Manage Project User, Manage Project Plans, Manage Project Lots, Manage Project Trade Partners, Manage Broker Agents, Manage Mortgage Companies, Manage Project Settings• Show the quantity of Unit Of Measure activities that are already on a activity package, option or plan instead of the word 'Added': Activity Packages > Add Activities, Options > Add Activities, Plans > Add Activities• Search fields and status filters were added to the following pages in Trade Partner accounts: Turnkey Bids, Turnkey Contracts, Unit of Measure Bids, Unit of Measure Contracts.

New tags

Defect #:	001-00-1-8784, 001-00-1-9534
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	<p>The following tags were added with this release:</p> <ul style="list-style-type: none">• @@prospect_comments@@ – shows the text saved in the 'Comments' field for prospects. Can be used on Sales Letters and Sales Emails.• @@plan_accounting_code@@ – shows a plan's accounting code. Can be used on Sales Contracts.

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>Display of old and new prospect type codes/sales reps on the prospect/buyer summary pages</i>	
Defect #:	001-00-1-9454
Ticket #:	001-00-149986, 101-29-021761
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Prospect Summary Sales Rep > Buyers > Buyer Summary Sales Management > Buyers > Manage Buyers & SPECS > Buyer Summary The Prospect and Buyer Summary pages have been updated to show both the old and new values when the prospect types code or sales rep for a prospect are updated.

<i>Issue with the order of Unit of Measure contracts</i>	
Defect #:	001-00-1-9664
Ticket #:	001-00-150227
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	Bidding & Contracting > Contracts > Unit of Measure When creating new versions of existing unit of measure contracts with effective dates in the future some contracts were created with a contract order that already existed. This issue has been corrected.

<i>Issue with the deletion of activities from NSO estimates</i>	
Defect #:	001-00-1-9445
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	NSO > Lot Matrix > NSOs (for a lot) > Manage > Estimate > Edit When an activity is deleted from a NSO estimate, the system will now check if the activity is on any NSO Trade Partner quotes. If the activity is on any NSO Trade Partner quotes a message will be shown to the user. If they choose to proceed the activity will be deleted from both the NSO estimate, and the NSO quote in both the builder and TP accounts.

<i>Issue with the order of Sales Reps on the drop down filter when editing a prospect/buyer</i>	
Defect #:	001-00-1-9676
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Edit The sales reps on the drop down on edit prospect page are now ordered alphabetically.

Issue with the prospects visit notes field

Defect #:	001-00-1-9514
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Edit When more than 4000 characters were entered into the visit notes field and the Save button was clicked, an error notification was shown, but the entered text disappeared. This has been corrected so that the user has the opportunity to revise the text.

Correction of the order and status filters on the company questions list

Defect #:	001-00-1-9646
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Company Setup > Company Questions The order of company questions has been corrected. The status filter was also set to default to 'Active.'

Issue with the Trade Partners tab on the project view page

Defect #:	001-00-1-9614
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Projects > View > Trade Partners tab The Trade Partners tab on the project view page did not update immediately when changes to Trade Partners were associated or unassociated to the project. This issue was corrected.

Issue with the Trade Partners list shown in Bidding & Contracting

Defect #:	001-00-1-9594
Ticket #:	001-00-149500
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Bidding & Contracting > Trade Partners The Trade Partners list at the project level has been updated to show Trade Partners associated to the project only.

Issue with the page count feature on activity list screens

Defect #:	001-00-1-9474
Ticket #:	001-00-149959
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Project Management > Lot Matrix > Activity List > Edit The user's selected page count was not maintained when editing activities. This issue has been corrected.

Issue with the results screen when associating a document to an entity

Defect #:	001-00-1-9425
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	When associating existing documents to an entity there is a search function that gives a results list of documents. The following changes were made to list of results: - The documents are sorted by the document name by default - A new column, Last Modified By, was added that shows the name of the user who last modified the document - A new column, Last Modified, was added that shows the date when the document was last modified.

Display of the Trade Number on the Trade Column of Turnkey Bids & Contracts in Trade Partner accounts

Defect #:	001-00-1-9228
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Trade Partner account > Bids > Select a builder > Turnkey Tab Trade Partner account > Contracts > Select a builder > Turnkey Tab Trade number is now shown before the Trade name on the Trade column on the turnkey bids and contract lists.

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 Customer Support Desk.

Version 6.1.1 - Release date T.B.D

Focus – Canadian Taxes

- Improve functionality to handle Canadian taxes and rebates.

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