



BuildTopia

Version 6.2.0

Release Notes

Table of Contents

Product and Company Information.....	3
Trademark and Patent Information	3
Disclaimer of Warranties and Limitation of Liabilities	3
Contacting Support and Services	4
Professional Services	4
Enhancements	5
Defect Fixes.....	18
BuildTopia Product Roadmap.....	20

Product and Company Information

The information in this document is confidential proprietary information belonging solely to Constellation HomeBuilder Systems, Inc., a wholly owned subsidiary of Constellation Software, Inc. This document is supplied under a license and may not be reproduced, published, or disclosed without prior written authorization. Constellation licenses its program products (software) to the customer in accordance with the terms and conditions of the BuildTopia Software License Agreement. No title or ownership of the BuildTopia software is transferred. Any use of the software beyond the terms of the aforesaid license, without the prior written authorization of Constellation, is prohibited.

The names of companies, products, people, characters and/or data mentioned in screens, reports, and other data examples are fictitious and are in no way intended to represent any real individual, company, product or event, unless otherwise noted. Any rights not expressly granted herein are reserved.

Trademark and Patent Information

Other product and company names mentioned herein might be the trademarks of their respective owners.

Disclaimer of Warranties and Limitation of Liabilities

The staff at Constellation has taken due care in preparing this information; however, nothing contained herein modifies or alters in any way the standard terms and conditions of the BuildTopia License Agreement by which the product was acquired. Nor does it increase in any way Constellation's liability to the customer. In no event shall Constellation or its affiliates be liable for incidental or consequential damages in connection with or arising from the use of the product, the accompanying documentation, or any related materials.

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 calculation and display of Canadian taxes and rebates on sales agreements

Defect #: 001-00-1-9072

Ticket #: 001-00-149090, 001-00-150961

BTBuilder BTSales BTService BTLead

Description: The calculation and display of Canadian General and Provincial Sales taxes and rebates on sales agreements has been updated across the sales modules. The calculation of tax will now be automatically based on the province for the selected lot, and the rebate will be calculated if the sales is for a primary residence, and the price falls under the appropriate limit. The workup screens have been updated to display sales pricing before and after tax. In cases where the buyer is targeting a specific final price, that price can be entered, and a reverse calculation will be performed to determine the differential or delta that is needed to arrive at the desired final purchase price.
*This functionality covers provinces that have the same GST and PST rates as Alberta and Ontario. Other provinces will be added in a future release.

Screenshots:

Sales Rep > Prospects > Workups > Submit Agreement

Sales Reps > Buyers > Agreement & Sales Management > Manage Buyers & SPECs > Agreement

Home > Copperfield Park: Sales Rep > Prospects > Workup List > Submit Agreement

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

Prospect: Ben Williams

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

Summary Survey **Workups** Tasks Financials Broker Agent Info Mort Comp Info

Submit Agreement for Workup #1 [\[view all workups\]](#)

Documents (0) | [Submit Agreement](#)

Date	Lot #	Plan	Base	Premium	Options	Addenda	Sub Total	Incentive	Asking Price	Delta	Total Price
11/02/2012	22	Plan C1	\$179,900.00 \$188,895.00	\$0.00	\$0.00	\$0.00	\$179,900.00 \$188,895.00	\$0.00	\$179,900.00 \$188,895.00	\$0.00	\$179,900.00 \$185,656.80

Buyer Info

* = Required Field

Buyer	Ben Williams	Lot #	22	Plan	Plan C1
Sales Rep	Bryan Williams	Address	22 Copper	Broker	No broker associated with the prospect.

Pricing

[View/Print Contract](#) [View/Print Pricing Addendum](#)

		Plus Tax	
Base Price	\$179,900.00	\$188,895.00	
Lot Premium	\$0.00	\$0.00	
Options	\$0.00	\$0.00	[See Below]
NSOs	\$0.00	\$0.00	[See Below]
Sub Total	\$179,900.00		
Incentives	(\$0.00)		[See Below]
Asking Price	\$179,900.00	\$188,895.00	
Differential (Delta)	\$0.00		Revise [See Below]
Total Price	\$179,900.00	\$188,895.00	
Tax:	\$8,995.00		
Rebate: [Edit]	\$3,238.20		
Purchase Price:	\$185,656.80		Revise

Internal Comments*

Differential Comments*if Differential is not \$0.00

Check here if there is a contingency on this contract:

Sales Rep > Prospects > Workup > Select Options, and Sales Rep > Buyers > CO > New & Edit

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

Select Options: Workup # 1

Workup List

KEY: STD = Standard Option ! = Mandatory Option * = Locked Out Option SP = SPEC Option X = Unavailable Option

Category: 120 Upgrade Drawers

Note: You must click SAVE to commit selections before selecting a new category.

Option		Price	Quantity	Total
120 Upgrade Drawers				
101 UPGRADE - kitchen: Change lower cabinet to pot drawers DESCRIPTION: Same style and color as kitchen	0	\$185.00	- 0 +	\$0.00
	Selection Notes: <input type="text"/>			
102 UPGRADE - Bathroom Main: Vanity drawers (1 set) DESCRIPTION: Same color and style as kitchen	0	\$250.00	- 0 +	\$0.00
	Selection Notes: <input type="text"/>			
103 UPGRADE - Bathroom Ensuite: Vanity drawers (1 set) DESCRIPTION: Same color and style as kitchen	0	\$250.00	- 0 +	\$0.00
	Selection Notes: <input type="text"/>			

Pricing Summary

Ben Williams
11/02/2012
2209-2-226
Plan C1
Base \$179,900.00
Premium \$0.00
Options \$0.00
NSOs \$0.00
Incentives \$0.00
Asking Price \$179,900.00
Delta \$0.00
Total Price \$179,900.00
Tax \$8,995.00
Rebate (\$3,238.20)
Purchase Price \$185,656.80

Sales Rep > Prospects > Workups > Rebate

Sales Management > Manage Buyers & SPECS > Agreement > Rebate

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

Prospect: Ben Williams

Summary Survey **Workups** Tasks Financials Broker Agent Info Mort Comp Info

Buyer Info

[Back](#)

Buyer Ben Williams
 Sales Rep Bryan Williams
 Broker No broker associated with the prospect.
 Lot # 22
 House Type Plan C1
 Contingency Date

Primary Residence

Pricing and Offer

		Plus Tax
Base Price	\$179,900.00	\$188,895.00
Lot Premium	\$0.00	\$0.00
Options	\$0.00	\$0.00
NSO	\$0.00	\$0.00
Addenda	\$0.00	
<hr/>		
Sub Total	\$179,900.00	
Incentives	\$0.00	
<hr/>		
Asking Price	\$179,900.00	\$188,895.00
Differential (Delta)	\$0.00	
<hr/>		
Total Price	\$179,900.00	\$188,895.00
Tax:	\$8,995.00	
Rebate:	\$3,238.20	
Purchase Price:	\$185,656.80	

Addition of attributes to options

Defect #:	001-00-1-10418
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	Data Library > Options > Edit > Attributes Sales Rep > Prospects > Workups > Select > Options Sales Rep > Buyers > CO > Edit <ul style="list-style-type: none"> - Attributes can now be added to options. Each option can have 2 attributes, with multiple selections per attribute - The attributes are defined for each option at the Data Library > Options level - Attributes and Attribute selections that are active (not archived) will shown as drop downs on the select option screens for workups and change orders - Detail for the attributes will be shown on purchase orders next to selection notes in the option details section.
Screenshots:	

Home > Data Library > Options > Edit Option Code

Plans	Activities	Options	Template Budgets	Schedules
-------	------------	---------	------------------	-----------

Edit Option Code Add Activities | Add Activity Package | Edit Activities

Option Attributes Successfully Updated * required

Number *	10001	Option Category *	zzz - Do Not Use
Name *	CARPET/PAD UPGRADES	Status *	Available
Option URL		Pricing *	<input type="radio"/> Fixed <input checked="" type="radio"/> Overridable
Description		Internal Notes	

Save Save & Exit Save & Update Plans Cancel

Activities **Attributes** Edit Attributes

Attribute Name ▲	Attribute Choices	Actions
Color	Black Gray Beige Brown (Archived)	Edit Attribute Choices
Type	Berber Cut Pile Plush Saxony	Edit Attribute Choices

2 Attributes listed. 50 Attributes per page

Home > Amber Hills: Sales Rep > Prospects > Workup List > Options

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

Select Options: Workup # 1 Workup List

KEY: STD = Standard Option ! = Mandatory Option * = Locked Out Option SP = SPEC Option X = Unavailable Option

Category: -- Current Options -- Save Finish Cancel

Note: You must click SAVE to commit selections before selecting a new category.

Option	Price	Quantity	Total
Electrical			
00000 Testing Option Activity DESCRIPTION: testing 5367F	\$0.00	1	\$0.00
Color: Blue	Material: [v]	Selection Notes:	
zzz - Do Not Use			
STD 10001 CARPET/PAD UPGRADES DESCRIPTION: CARPET/PAD UPGRADES test	\$1,000.00	1	\$1,000.00
Color: Beige	Type: Saxony	Selection Notes: Standard Option	

Save Finish Cancel

Pricing Summary

Jim Bean
10/22/2012
014
Abbington
Base \$375,000.00
Premium \$10,000.00
Options \$1,000.00
NSOs \$0.00
Incentives \$0.00
Asking Price \$386,000.00
Delta \$999.50
Total Price \$386,999.50

Ability to transfer workups from one lot to another in the project

Defect #:	001-00-1-9184
Ticket #:	001-00-148660, 001-00-152209
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Workups > Transfer Workups Workups that have not yet been submitted can now be transferred to other lots in the same project. The new lot must offer the same plan, and not yet have a SPEC. The user will be offered a chance to cancel the process if there are lot-dependent options on the workup, since those cannot be transferred to the new lot.
Screenshots:	

Home > Amber Hills: Sales Rep > Prospects > Workup List

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

Prospect: Jim Bean

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

Summary | Survey | **Workups** | Tasks | Financials | Broker Agent Info | Mort Comp Info

Workup List

[Create New Workup](#)

Workup	Date	Project Name	Lot #	Address	Plan	Base	Premium	Options	Total Price	Actions
1	11/02/2012	Amber Hills	015	124 Main Street	Abbington	\$375,000.00	\$0.00	\$3,000.00	\$378,000.00	Select Options Create NSO NSO Transfer Hold Lot Submit Agreement Delete

[Contact Us](#) | [Terms & Conditions](#) | [Privacy Notice](#) | [User Agreement](#)
 ©2012 BuildTopia. Version: 6.2.0.157 | [Trademark and Copyright Notice](#)

Home > Amber Hills: Sales Rep > Prospects > Workup List > Create New Workup

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

Prospect: Jim Bean

Summary | Survey | **Workups** | Tasks | Financials | Broker Agent Info | Mort Comp Info

Transfer Workup

Select a Lot 1

The following options cannot be transferred to the new lot:

Hardwood--upgrade II
 HARDWOOD flooring

Continue
Cancel

Ability to enter cents in the Differential/Delta field to adjust the final price on sales contracts

Defect #:	001-00-1-9767
Ticket #:	001-00-147509
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Workups > Submit Agreement Sales Management > Manage Buyers & SPECS > Agreement Submitted Cents can now be entered in the Differential/Delta field to allow adjustment of the final price on sales contracts.
Screenshots:	

Home > Amber Hills: Sales Rep > Prospects > Workup List > Submit Agreement

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

Prospect: **Jim Bean** Search Prospects | Add Prospect

Summary Survey **Workups** Tasks Financials Broker Agent Info Mort Comp Info

Submit Agreement for Workup #1 [\[view all workups\]](#) Documents (0) | Submit Agreement

Date	Lot #	Plan	Base	Premium	Options	Addenda	Sub Total	Incentive	Asking Price	Delta	Total Price
10/22/2012	014	Abbington	\$375,000.00	\$10,000.00	\$1,000.00	\$0.00	\$386,000.00 \$386,000.00	\$0.00	\$386,000.00	\$999.50	\$386,999.50

Buyer Info * = Required Field

Buyer	Jim Bean	Lot #	014	Plan	Abbington (A1)
Sales Rep	Amos Odenyo	Address		Broker	Jane Doe

Pricing View/Print Contract View/Print Pricing Addendum

Plus Tax

Base Price	\$375,000.00	
Lot Premium	\$10,000.00	
Options	\$1,000.00	[See Below]
NSOs	\$0.00	[See Below]
<hr/>		
Sub Total	\$386,000.00	
Incentives	(\$0.00)	[See Below]
<hr/>		
Asking Price	\$386,000.00	
Differential (Delta)	<input type="text" value="999.50"/>	<input type="button" value="Calculate"/> [See Below]
<hr/>		
Total Price	\$386,999.50	<input type="button" value="Reset"/>

Internal Comments*

Differential Comments*if Differential is not \$0.00

Check here if there is a contingency on this contract:

New HTML email editor that incorporates BuildTopia tags

Defect #:	001-00-1-10349
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTRService <input checked="" type="checkbox"/> BTLead
Description:	Documents > Compose Email Template Documents > Profile > Edit (for email documents) A new HTML editor has been added to the Documents module that is easier to use, and that incorporates the BuildTopia tags that are available for emails. This will help prevent errors from incorrectly typed tags, and make it easier to create HTML email templates.
Screenshots:	

Compose Email

Back

General Information

* required

Document Name * Document Folder General Access
 Document Description Document Type Sales Email

Permissions

Protected? Yes No

Email Body

Subject *

Body *

Format Font Family Font Size

Follow Up Tag List

Rich text editor toolbar with icons for bold, italic, underline, bulleted list, numbered list, link, unlink, insert image, etc.

Path:

Lot address is displayed on the lot drop-down when creating new workups

Defect #:	001-00-1-9076
Ticket #:	001-00-149088
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Workups > Create New Workup The lot address is now displayed on the lot drop-down when creating new workups in addition to the lot number to make it easier to find lots.
Screenshots:	

Home > Amber Hills: Sales Rep > Prospects > Workup List > Create New Workup

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

Prospect: Jim Bean

Summary Survey **Workups** Tasks Financials Broker Agent Info Mort Comp Info

New Workup

Select a Project Amber Hills

Select a Lot --Select Lot--
 012
 013
 014
 015, 124 Main Street
 01A10, 123 Main street
 1

Select a Plan

Current Workups

Workup	Date	Project Name	Lot #	Plan	Base	Premium	Options	Total Price	Status
1	10/22/2012	Amber Hills	014	Abbington	\$375,000.00	\$10,000.00	\$1,000.00	\$386,000.00	New Workup

New sales permission to control the ability to edit and remove agreement contingency dates

Defect #:	001-00-1-10188
Ticket #:	001-00-150428
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	<p>Sales Rep > Buyer > Agreement Submitted, Agreement Countered & Agreement Accepted Sales Management > Manage Buyers & SPECS > Agreement Submitted, Agreement Countered, & Agreement Accepted</p> <p>A new sales permission has been added called 'Edit/Remove Contingency Dates.' Users with a sales role that contains this permission are able to edit and remove the contingency date on agreements with the statuses specified above.</p> <p>To remove the contingency date, click Edit, delete the date, and click Save.</p>

Screenshots:

Home > Admin > Edit Sale Role

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

Edit Sale Role * Required

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

- Administrator Roles
- Sales Roles**

Role name *

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

Sales Manager

Check the permissions that this role should have

- Sales Manager Read Only
- Sales Manager Read/Write
- Delete Terminated Agreements
- Edit/Remove Contingency Dates**
- Edit Agreement Dates

Check the messages that users with this role should receive

- Sales Agreement Terminated
- Plan Pricing Updated

Home > Amber Hills: Sales Management > View Agreement

Lot Matrix	Price Plans	Price Options	Manage Buyers and SPECS	Follow-Up
------------	-------------	---------------	-------------------------	-----------

Buyer/SPEC Info Documents (0)

Buyer	jorgen Kanagalingam	Lot #	71306	Plan	Abbington (A1)	Broker	No broker associated with the prospect.
Sales Rep	Dave Bell	Address	511	Contingency Date	<input type="text" value="03/30/2007"/> <input type="button" value="Save"/>	Contract Date*	03/15/2007 <input type="button" value="Edit"/>

Pricing

Base Price	\$750,000.00	
Lot Premium	\$0.00	
Options	\$800.00	[See Below]
NSO	\$0.00	[See Below]
Addenda	\$0.00	[See Below]
<hr/>		
Sub Total	\$750,800.00	
Incentives	(\$0.00)	[See Below]
<hr/>		
Asking Price	\$750,800.00	
Differential (Delta)	\$0.00	
<hr/>		
Total Price	\$750,800.00	

New sales permission to control the ability to edit agreement contract dates

Defect #:	001-00-1-10346
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	<p>Sales Rep > Buyer > Agreement Accepted & Agreement Finalized Sales Management > Manage Buyers & SPECS > Agreement Accepted & Agreement Finalized</p> <p>A new sales permission has been added called 'Edit Agreement Dates.' Users with a sales role that contains this permission are able to edit the agreement contract date on agreements that are in the 'Agreement Accepted' and 'Agreement Finalized' statuses.</p>

Screenshots:

Home > Admin > Edit Sale Role

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

Edit Sale Role

General * Required

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

Role name *

Permissions Check the permissions that this role should have

<p>Sales Rep</p> <input checked="" type="checkbox"/> Sales Rep Read Only <input checked="" type="checkbox"/> Sales Rep Read/Write <input checked="" type="checkbox"/> Reschedule Tasks <input checked="" type="checkbox"/> Send Mass emails via Advanced Prospect Search <input checked="" type="checkbox"/> View Prospects and Tasks assigned to the User Only	<p>Sales Manager</p> <input checked="" type="checkbox"/> Sales Manager Read Only <input checked="" type="checkbox"/> Sales Manager Read/Write <input checked="" type="checkbox"/> Delete Terminated Agreements <input checked="" type="checkbox"/> Edit/Remove Contingency Dates <input checked="" type="checkbox"/> Edit Agreement Dates
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Sales Messages Check the messages that users with this role should receive

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

Sales

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

Permission Roles

Administrator Roles
Sales Roles

Home > Amber Hills: Sales Management > View Agreement

Lot Matrix	Price Plans	Price Options	Manage Buyers and SPECS	Follow-Up
------------	-------------	---------------	-------------------------	-----------

Buyer/SPEC Info Documents (0)

Buyer Michael Bellerose	Lot # 08	Plan Barlow (B1)	Broker No broker associated with the prospect. * required
Sales Rep Dan Lauf	Address 511	Contingency Date	<input type="text" value="10/03/2005"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> * Contract date is required.

Pricing

Base Price	\$333,630.00	
Lot Premium	\$6,000.00	
Options	\$9,559.00	[See Below]
NSO	\$2,000.00	[See Below]
Addenda	\$1,000.00	Addenda Exist
Sub Total	\$352,189.00	
Incentives	(\$0.00)	[See Below]
Asking Price	\$352,189.00	
Differential (Delta)	\$0.00	
Total Price	\$352,189.00	

New filters on the Buyers list is Sales Rep

Defect #:	001-00-1-9988																																							
Ticket #:																																								
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead																																							
Description:	Sales Rep > Buyers The following filters were added to the Buyers list in Sales Rep were added to make it easier to find and sort buyers: Plan, Sales Status & Construction Status																																							
Screenshots:	<p>Home > Amber Hills: Sales Rep > Buyers</p> <table border="1"> <tr> <th>To Do</th> <th>Prospects</th> <th>Buyers</th> <th>Broker Agent/Mortgage Co List</th> <th>SPEC List</th> <th>Lot List</th> </tr> </table> <p>Buyers</p> <p>Current Settled Terminated</p> <p>Search: <input type="text"/></p> <p>Plan: All Sales Status: All Construction Status: All</p> <table border="1"> <thead> <tr> <th>Buyer Name ▲</th> <th>Lot</th> <th>Address</th> <th>Plan</th> <th>Sales Status</th> <th>Construction Status</th> <th>Total Price</th> <th>Projected Completion Date</th> <th>Projected Settlement Date</th> <th></th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Abbott, Harold</td> <td>18</td> <td>567 Amber Way</td> <td>A1 Abbington</td> <td>Agreement Finalized</td> <td>In Production</td> <td>\$507,360.00</td> <td>12/19/2012</td> <td>10/31/2009</td> <td>1</td> <td>NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log</td> </tr> <tr> <td>Adams, Adam</td> <td>10</td> <td>576 Market Ridge Rd</td> <td>A1 Abbington</td> <td>Agreement Finalized</td> <td>Completed</td> <td>\$505,501.00</td> <td>05/12/2002</td> <td>08/31/2010</td> <td>0</td> <td>NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log</td> </tr> </tbody> </table>	To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List	Buyer Name ▲	Lot	Address	Plan	Sales Status	Construction Status	Total Price	Projected Completion Date	Projected Settlement Date		Action	Abbott, Harold	18	567 Amber Way	A1 Abbington	Agreement Finalized	In Production	\$507,360.00	12/19/2012	10/31/2009	1	NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log	Adams, Adam	10	576 Market Ridge Rd	A1 Abbington	Agreement Finalized	Completed	\$505,501.00	05/12/2002	08/31/2010	0	NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log
To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List																																			
Buyer Name ▲	Lot	Address	Plan	Sales Status	Construction Status	Total Price	Projected Completion Date	Projected Settlement Date		Action																														
Abbott, Harold	18	567 Amber Way	A1 Abbington	Agreement Finalized	In Production	\$507,360.00	12/19/2012	10/31/2009	1	NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log																														
Adams, Adam	10	576 Market Ridge Rd	A1 Abbington	Agreement Finalized	Completed	\$505,501.00	05/12/2002	08/31/2010	0	NSO CO Comments Email Addenda Financials Finalized Homepage Settlement Date Option Log																														

New project management permission to control the ability to perform SPEC to PA conversions

Defect #:	001-00-1-10084
Ticket #:	001-00-151529
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTRService <input type="checkbox"/> BTLead
Description:	Project Management > Lot Matrix A new project management permission has been added called 'Complete SPEC to PA Process.' Users with a project management role that contains this permission are able to perform the SPEC to PA conversion process which consolidates SPEC and Purchase Options and NSOs for SPECS under construction that have been sold.
Screenshots:	

Edit Project Mgmt. Role

General

* Required

- 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

Role name *

Permissions

Check the permissions that this role should have

General

- Access PM Module
- Edit Lot Information
- View Trade Partners
- Complete SPEC to PA Process

Purchase Orders

- Print Pending Purchase Orders
- View Purchase Orders
- Generate Purchase Orders
- Create Manual Purchase Orders
- Release Manual Purchase Orders
- Edit Purchase Orders
- Approve Purchase Orders
- Partially Approve Purchase Orders
- Void Purchase Orders
- Re-open Purchase Orders
- Reassign Purchase Orders
- Edit Purchase Order Variance Codes

Activity List

- View Activity Lists
- Edit Activity List Schedule Tasks
- Add Activities to Activity Lists
- Edit Activity Lists
- Delete Activities from Activity Lists
- Access Update Wizard
- View Budgets
- Edit Original Budgets
- Edit Current Budgets
- Update Activity List with Change Orders

Schedule

- View Schedules
- Accept to Production & Generate Schedules
- Approve Schedules
- Pull Back Schedules
- Edit Schedules
- Edit Construction Log Variance Codes
- Place Schedules On Hold & Use the '01 No Variance' Code

Sales

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

Permission Roles

- Administrator Roles
- Sales Roles
- Directory Roles
- Bidding & Contracting Roles
- BTMobile Roles
- Document Roles
- NSO Roles
- Project Mgmt. Roles**

System Messages

Check the permissions that this role should have

- CO Approved by Sales
- Manual PO Created
- Manual PO Opened
- PO Approval
- PO Approval Batch
- PO Generated
- PO Generation Batch
- PO Modification Batch
- PO Modified
- PO Partially Received
- PO Reopened
- PO Void Batch
- PO Voided
- SPEC to PA Processed
- Schedule Approval
- Schedule Edit
- Schedule Hold (OFF)
- Schedule Hold (ON)
- Settlement Date Edited by Production
- Settlement Date Edited by Sales
- Task Edit within LeadTime
- Task Start LeadTime
- Task Trade Partner Assignment

Save Cancel

Project Lots

Quick Schedule | Day Schedule | Week Schedule | Month Schedule | Update Wizard

Expand All Collapse All

Lot #	Address	Sales Status	Construction Status	Schedule	Action
00828		Sold	In Production	Review Schedule	1 Activity List Edit View Options CO NSO Variance Log
01a	Address at Lot Level	Sold - SPEC to PA	In Production	Approve Schedule	0 Activity List Edit View Options CO NSO Variance Log
099		Sold - SPEC to PA	In Production	Review Schedule	0 Activity List Edit View Options CO NSO Variance Log

Ability to select projects when creating contracts from a Unit of Measure bid

Defect #:	001-00-1-10074
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Bidding & Contracting > Bids > Unit Of Measure > View > Create Contract When generating contracts from unit of measure bids that are associated to multiple projects, users can now select the projects that should receive new contracts.
Screenshots:	

Home > Amber Hills: Bidding & Contracting: Bids > Document List

Contracts	Bids	Proforma Budgets	Trade Partners	Project: Amber Hills
------------------	-------------	------------------	----------------	----------------------

Create Contract for: 01 Appliance Supplier Back

Trade Partner: Billy-Bobs Status: Contract Created Created on: 04/11/2007 by John Brodrick
 Tax Rate: 0.0% TP Status: Never Sent Last Modified on: 10/04/2012 by Amos Odenyo

	Project Name	Ordering	Tax Rate	Effective Date
<input type="checkbox"/>	Amber Hills	1	5.135%	11/01/2012
<input type="checkbox"/>	Amber Hills Phase II	2	0.0%	11/01/2012
<input type="checkbox"/>	Parkview Gardens	2	0.0%	11/01/2012
<input type="checkbox"/>	Silver Meadow Estates	2	0.0%	11/01/2012

Note: Tax Rate only applies to taxable activities within the Contract Apply | Cancel

Addition of a warning message when 'All Plans' is selected when updating turnkey bids and contracts

Defect #:	001-00-1-10075
Ticket #:	001-00-151533
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Bidding & Contracting > Bids > Turnkey > Edit Bidding & Contracting > Contracts > Turnkey > Edit A warning message will now be shown when 'All Plans' is selected for base or option activities on turnkey bids or contracts, to prevent erroneous updates. The user can click 'OK' to save on all plans.
Screenshots:	

Home > Amber Hills: Bidding & Contracting: Bids > Edit Option Bid

Contracts	Bids	Proforma Budgets	Trade Partners	Project: Amber Hills
------------------	-------------	------------------	----------------	----------------------

Bid for Trade: 0.Electrician

Trade Partner: BuildTopia Test Subcontractor Status: Bid Revised

Plan: A1 Abbington Save Changes on Page before switching Plans

Tax Rate: 0.0%

Message from webpage

?"All Plans" has been selected for some activities, do you wish to continue?

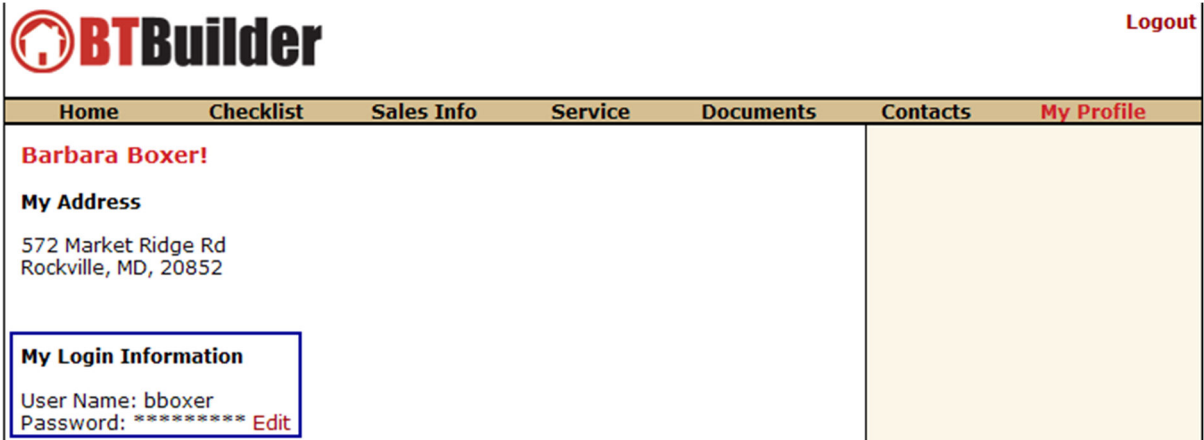
OK Cancel

	Option Code	Tax?	Amount
<input checked="" type="checkbox"/>	20771 FOYER SURF MT FIXT SL8440 (Available)		
<input checked="" type="checkbox"/>	12.5 Electric turn key	<input type="checkbox"/>	\$0.00

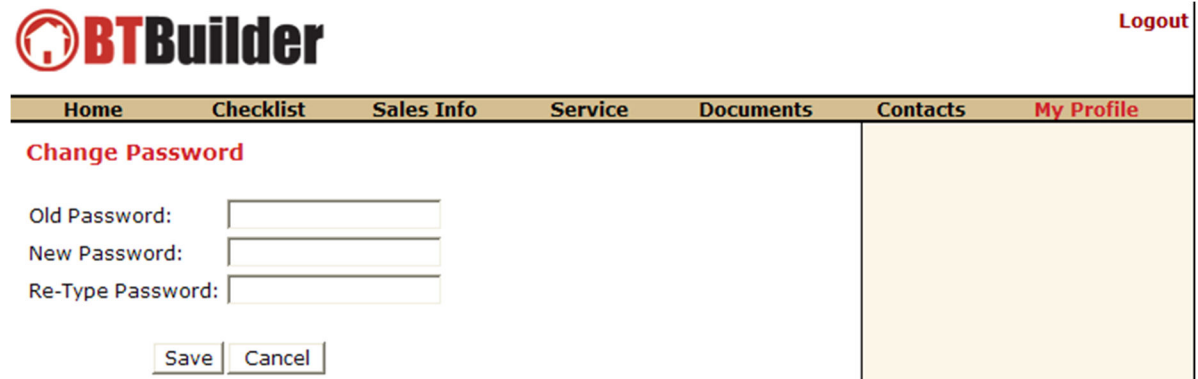
Save Save & Exit Cancel

Password reset on the Homebuyer Homepage

Defect #:	001-00-1-10348
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Homebuyer Homepage > My Profile Owners can now reset the passwords for their Homebuyer Homepages on their own.
Screenshots:	



The screenshot shows the BTBuilder user interface. At the top left is the BTBuilder logo. At the top right is a "Logout" link. Below the logo is a navigation menu with items: Home, Checklist, Sales Info, Service, Documents, Contacts, and My Profile. The "My Profile" item is highlighted. The main content area displays the user's name "Barbara Boxer!" and "My Address" as "572 Market Ridge Rd, Rockville, MD, 20852". A box titled "My Login Information" shows "User Name: bboxer" and "Password: *****" with an "Edit" link.



The screenshot shows the BTBuilder "Change Password" page. It features the BTBuilder logo and "Logout" link at the top. The navigation menu is the same as in the previous screenshot, with "My Profile" highlighted. The main content area is titled "Change Password" and contains three input fields: "Old Password:", "New Password:", and "Re-Type Password:". Below these fields are "Save" and "Cancel" buttons.

New tags for emails and contracts

Defect #:	001-00-1-9072, 001-00-1-10108, 001-00-10288
Ticket #:	001-00-152023, 001-00-151553
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>The following new tags have been added:</p> <ul style="list-style-type: none">• @@net_taxes@@• @@net_taxes_text@@• @@purchase_price@@• @@purchase_price_text@@• @@purchase_price_minus_deposits@@• @@purchase_price_minus_deposits_paid_and_unpaid@@• @@total_price_with_taxes@@• @@total_price_with_taxes_text@@• @@total_rebates@@• @@total_rebates_text@@• @@total_taxes@@• @@total_taxes_text@@• @@project_company_name@@• @@owner_primary_contact@@

Usability updates to the Customer Service Module

Defect #:	001-00-1-9984, 001-00-1-9986, 001-00-1-9987
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>In an effort to make information easier to see and find in the Customer Service module the following updates have been made:</p> <ul style="list-style-type: none">• Service Orders tab: Re-organization of columns and addition of a Project filter• CS Home > Unassigned Requested tab: Re-organization of columns• Owners tab: Re-organization of columns

Usability updates to the Trade Partner accounts

Defect #:	001-00-1-9994, 001-00-1-10016, 001-00-1-10036, 001-00-1-10037, 001-00-1-10470, 001-00-1-10471, 001-00-1-10472, 001-00-1-10520, 001-00-1-10540
Ticket #:	001-00-1511128
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>In an effort to make information easier to see and find in Trade Partner accounts the following updates have been made:</p> <ul style="list-style-type: none">• The Lot Address has been added to the following screens: Purchase Orders, NSO Quotes, and Invoices.• Lot Number and Address search fields have been added to the Purchase Orders list• Project and Trade filters have been added to the Bid Invitations section of Bids• The column orders on the Purchase Order tabs have been reformatted to show information more clearly• A Project filter has been added to the Service Orders tab• A Project filter has been added to the NSO Quotes tab

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>Prevention of double-clicking of the create and approve schedule links</i>	
Defect #:	001-00-1-10390
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Project Management > Lot Matrix > Create Schedule > Calculate Schedule Project Management > Lot Matrix > Review Schedule > Approve Construction Schedule & Approve Pre-Construction Schedule The links mentioned above have been adjusted to prevent double-clicking to prevent creation of duplicate schedules on lots.

<i>Issue with duplicate prospect/buyer checking functionality</i>	
Defect #:	001-00-1-10398
Ticket #:	001-00-152242
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Add Prospect When a buyer was presented as the results of the duplicate checking functionality, it was possible to create a new workup for the existing buyer. This has been corrected.

<i>Validation of prospect and buyer email addresses</i>	
Defect #:	001-00-1-10519
Ticket #:	001-00-152549
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Add Prospect & Edit Sales Rep > Buyers > Buyer Name > Edit Sales Management > Manage Buyers & SPECS > Buyer Name > Edit Customer Service > Owners > Owner Name > Edit Text entered into the email address fields on the above screens will be checked to ensure that saved entries are in a valid email format.

<i>Validation of the text field for Addenda</i>	
Defect #:	001-00-1-10339
Ticket #:	001-00-151503
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	Sales Rep > Buyers > Addenda > New & Edit Sales Management > Manage Buyers & SPECS > Addenda > New & Edit Validation of the Addenda text field has been updated to accept up to 4000 characters.

Issues when generating sales contracts while using Internet Explorer

Defect #:	001-00-1-9570
Ticket #:	001-00-149838, 001-00-150025
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	An addition pop-up box was sometimes shown when generating sales contract documents while using Internet Explorer. This has been corrected.

Issues when trying to print the screen when using Internet Explorer

Defect #:	001-00-1-9884
Ticket #:	001-00-150905, 001-00-151084, 001-00-151528, 001-00-152382
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Some users were experiencing issues when trying to print BuildTopia screens when using Internet Explorer. This has been corrected.

Issue with the display of tax on Turnkey Bids in Trade Partner accounts

Defect #:	001-00-10420
Ticket #:	001-00-152332
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Trade Partner Account: Home > Bid > View In some cases tax, although correctly calculated, was not displayed on the view screens for some turnkey bids. This has been corrected.

Missing documents column on the 'All' tab for Purchase Orders in Trade Partner accounts

Defect #:	001-00-10214
Ticket #:	001-00-151812
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Trade Partner Account: Home > Purchase Orders The documents column was missing from the 'All' tab for Purchase Orders in Trade Partner accounts. This has been corrected.

Issues with project name shown on month schedule views in Trade Partner accounts

Defect #:	001-00-10521
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Trade Partner Account: Home > Schedules The project name was not shown on the month schedule for Trade Partners if they navigated to different weeks using the 'Next' and 'Previous' links. This has been corrected.

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2013. 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 6.3.0, Release date March 5th 2013

Focus – Sales and Bidding & Contracting

- Improve cross-project functionality for updating information in Bidding and Contracting
- Combine Sales Rep and Sales Management modules, with advanced permissions
- Improved sales incentives functionality.

Version 6.4.0, Release date July 23rd 2013

Focus – User interface re-design

- Updated design theme
- Improved, intuitive workflows
- Tablet browser friendly screens.