



BuildTopia

Version 6.3.0

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.

Tarion Critical Dates management

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|--|----------------------------|-------------------|---------------|-------------------|---------------|-----------------|----------------|---------------|-------------------------|--|----------------|--------------------|----------------------------|--|-------------------------|-------------|----------------------|--|-----------------|----------------------|-------------|--|-----------------|-----------------|-----------|--|--------|---------|-------------|--|------------|---------|---------------|--|-------|---------|-------------|--|-----------|--------|---------------|--|--------|--|------------------|--|---------------------------------------|--|----------------|--|----------|--------|------------------|--|-------------|--|--------------|--------------|
| Defect #: | 001-00-1-10669 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ticket #: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Description: | Sales Rep > Buyers > Buyer Summary > Critical Dates tab Builders who operate in Ontario Canada will now be able to track and manage Tarion Critical Dates within BuildTopia. A new tab will automatically appear on the buyer summary page for lots in projects with an Ontario address. The Critical Dates will be automatically calculated by the application base on provided occupancy dates depending on whether the project is designated as a Single Family or Multi Family project. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Screenshots: | <div style="border: 1px solid gray; padding: 5px;"> <p>Admin > Projects > Edit</p> <p>Home > Admin > Projects > Edit Project</p> <table border="1" style="width: 100%; border-collapse: collapse; background-color: #333; color: white;"> <tr> <td style="background-color: red; color: white;">Projects</td> <td>Users</td> <td>Imports</td> <td>Company/Acct Info</td> <td>Company Setup</td> <td>BTService Setup</td> </tr> </table> <p>Edit Project 1 Toronto Woods Project List</p> <div style="text-align: right; color: green; font-size: small;">* required</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Project Name *</td> <td>Toronto Woods</td> <td style="width: 50%;">Project Accounting Code</td> <td></td> </tr> <tr> <td>Company Name *</td> <td>Toronto Woods Inc.</td> <td>Project Accounting Code II</td> <td></td> </tr> <tr> <td>Project Administrator *</td> <td>Schmoe, Joe</td> <td>Company Account Code</td> <td></td> </tr> <tr> <td>Project Manager</td> <td>-- Select Manager --</td> <td>Sales Phone</td> <td></td> </tr> <tr> <td>Project Address</td> <td>123 Main Street</td> <td>Sales Fax</td> <td></td> </tr> <tr> <td>City *</td> <td>Toronto</td> <td>Sales Email</td> <td></td> </tr> <tr> <td>Province *</td> <td>Ontario</td> <td>Service Phone</td> <td></td> </tr> <tr> <td>Zip *</td> <td>S4K 1Z3</td> <td>Service Fax</td> <td></td> </tr> <tr> <td>Country *</td> <td>Canada</td> <td>Service Email</td> <td></td> </tr> <tr> <td>County</td> <td></td> <td>Accounting Phone</td> <td></td> </tr> <tr> <td>Website/URL (must begin with http://)</td> <td></td> <td>Accounting Fax</td> <td></td> </tr> <tr> <td>Status *</td> <td>Active</td> <td>Accounting Email</td> <td></td> </tr> <tr> <td>Description</td> <td></td> <td>Project Type</td> <td>Multi-Family</td> </tr> </table> <p style="text-align: right;">Save Cancel</p> </div> | Projects | Users | Imports | Company/Acct Info | Company Setup | BTService Setup | Project Name * | Toronto Woods | Project Accounting Code | | Company Name * | Toronto Woods Inc. | Project Accounting Code II | | Project Administrator * | Schmoe, Joe | Company Account Code | | Project Manager | -- Select Manager -- | Sales Phone | | Project Address | 123 Main Street | Sales Fax | | City * | Toronto | Sales Email | | Province * | Ontario | Service Phone | | Zip * | S4K 1Z3 | Service Fax | | Country * | Canada | Service Email | | County | | Accounting Phone | | Website/URL (must begin with http://) | | Accounting Fax | | Status * | Active | Accounting Email | | Description | | Project Type | Multi-Family |
| Projects | Users | Imports | Company/Acct Info | Company Setup | BTService Setup | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Name * | Toronto Woods | Project Accounting Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Company Name * | Toronto Woods Inc. | Project Accounting Code II | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Administrator * | Schmoe, Joe | Company Account Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Manager | -- Select Manager -- | Sales Phone | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Address | 123 Main Street | Sales Fax | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| City * | Toronto | Sales Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Province * | Ontario | Service Phone | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Zip * | S4K 1Z3 | Service Fax | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Country * | Canada | Service Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| County | | Accounting Phone | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Website/URL (must begin with http://) | | Accounting Fax | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Status * | Active | Accounting Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Description | | Project Type | Multi-Family | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Sales Rep > Buyers > Buyer Summary > Critical Dates tab

Home > Toronto Woods: Sales Rep > Prospects > Prospect Info > Critical Dates

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

Buyer Report: Craig Smith

Summary Survey Workup Tasks Financials Broker Agent Info Mort Comp Info **Critical Dates**

Add/Edit Critical Date * = Required Field

| | | | |
|-------------------------------|------------|-------------------------------|---|
| *Closing Type : | | Tentative | |
| Projected | | | |
| 1st Tentative Occupancy Date: | 07/31/2013 | Actual | *1st Tentative Occupancy Date: 07/31/2013 |
| 2nd Tentative Occupancy Date: | 11/28/2013 | 2nd Tentative Occupancy Date: | |
| Firm Occupancy Date: | 03/28/2014 | Firm Occupancy Date: | |
| Outside Occupancy Date: | 11/28/2014 | Outside Occupancy Date: | |
| Purchaser Termination: | 12/29/2014 | Purchaser Termination: | |
| | | Roof Completion Date: | |
| Notices | | | |
| 1st Tentative Occupancy Due: | 05/02/2013 | 1st Tentative Occupancy Sent: | |
| 2nd Tentative Occupancy Due: | 08/30/2013 | 2nd Tentative Occupancy Sent: | |
| Firm Occupancy Due: | 03/18/2014 | Firm Occupancy Sent: | |

Addenda to Closing Save

Revision of the Save and Flowdown feature for template budgets

| | |
|---------------------|---|
| Defect #: | 001-00-1-11872 |
| Ticket #: | 001-00-206791 |
| | <input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | Data Library > Template Budgets > Base & Data Library > Template Budgets > Options The Save and Flowdown feature on the Base and Option tabs for Template Budgets has been revamped to make it easier to filter activities, and save changes on multiples. The updates are similar to those the Proforma Budgets during release 6.1.0. |
| Screenshots: | |

Home > Data Library > Template Budgets > Template Budgets

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

Template Budgets

Update with Proforma Budgets

Do not include tax in template budget values as they are automatically added when original and current budgets are created.

Unit of Measure **Base** Option
Page Total: \$4,188.00

Plan Name:
Trade: Type:
Save

| Trade | Activity # ▲ | Activity Code/Package Name | Scope of Work | Current Template | Revised Template | |
|-------------------------|--------------|---|---|------------------|------------------|--------------------------|
| 1 COMPLETION/INSPECTION | 00 | Custom | DL > Plan > Activity scope of work | \$40.00 | \$40.00 | <input type="checkbox"/> |
| 01 General Conditions | 000001 | Surveying | Surveying (1 HR) | \$25.00 | \$25.00 | <input type="checkbox"/> |
| PRELIMINARY/SITE PREP | 0001 Draw | Test Draw Package | Test Draw Package | \$0.00 | \$0.00 | <input type="checkbox"/> |
| 0002 test trade | 0002UM | test UM (0001 HP Non-Draw Activity Package) | 0002UM scope of work (20 GAL) | \$600.00 | \$600.00 | <input type="checkbox"/> |
| Electrical | 001a | Testing Option Activity | 001a scope of work | \$0.00 | \$0.00 | <input type="checkbox"/> |
| 03 Concrete | 01.0001.5 | test 2/21/062 | | \$0.00 | \$0.00 | <input type="checkbox"/> |
| Shell Contractor | 02.0001 | Framing | | \$0.00 | \$0.00 | <input type="checkbox"/> |
| 01 Appliance Supplier | 051865 | base | appliances | \$27.00 | \$27.00 | <input type="checkbox"/> |
| 01 Appliance Supplier | 100 | New Activity Name (0001 HP Non-Draw Activity Package) | 100 scope of work (15 HR) | \$945.00 | \$945.00 | <input type="checkbox"/> |
| 0.Electrician | 12.5 | Electric turn key | | \$50.00 | \$50.00 | <input type="checkbox"/> |
| 01 Appliance Supplier | 1234 | test | testing | \$1.00 | \$1.00 | <input type="checkbox"/> |
| Carpentry | 3150 | Framing Labor | | \$0.00 | \$0.00 | <input type="checkbox"/> |
| Plumbing | 3600 | Plumbing Total Contract (if used you will not need 5600 series) | Plumbing Total Contract (if used you will not need 5600 series) Activity Package | \$0.00 | \$0.00 | <input type="checkbox"/> |
| Plumbing | 3610 | Rough plumbing | test test | \$1,500.00 | \$1,500.00 | <input type="checkbox"/> |
| Masonry | 4100 | Masonry | Masonry Activity Package | \$1,000.00 | \$1,000.00 | <input type="checkbox"/> |

Page 1 of 13

15 Base Activities per page

Display and capture of history when Sales or Production Rejected NSOs are re-submitted

| | |
|---------------------|---|
| Defect #: | 001-00-1-11891 |
| Ticket #: | |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | NSO > Lot Matrix > NSOs for a lot > Manage When a NSO that has the status 'Sales Rejected' or 'Production Rejected' is re-submitted, this is now captured and displayed on the comments section at the bottom of the main NSO view screen. |
| Screenshots: | |

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

Exit NSO Module

| | | | | |
|-------------------|----------|---------------|---------|----------------------|
| Lot Matrix | NSO List | Estimate List | Archive | Project: Amber Hills |
|-------------------|----------|---------------|---------|----------------------|

View NSO #: 2

[Add Comment](#) | [Copy](#) | [Documents \(0\)](#) | [Back](#)

| | | |
|---|---|---|
| Prospect/Buyer: Ted Williams NSO Number: 2 Origin: Buyer | Project: Amber Hills Lot/Address: 101 / 101 Main Street Plan: A1 Abbington | Created By: Amos Odenyo on 03/01/2013 Modified By: Amos Odenyo on 03/04/2013 |
|---|---|---|

NSO Information Edit

| | | | |
|-----------------------|--------------|-----------------|-------------|
| Option Category | Not Selected | NSO Status | Submitted |
| Lockout Override | | Estimate Status | Not Created |
| Expiration Date | | | |
| Requested Description | test 2 | | |
| Quoted Description | | | |

- Submit NSO**
- Sales Decision**
- Production Decision**
- Create Estimate**
- Approve/Price NSO**
- Buyer Decision**
- Release NSO**
- Apply to PO**

Pricing Information

| | | | |
|-----------------|--------|----------------|--------------------------|
| Retail Price | \$0.00 | Total Budget | \$0.00 |
| Production Cost | \$0.00 | Total Estimate | \$0.00 (0 Items Created) |

Comments Estimate

Search:

| Date | Author | Subject | Comments |
|------------|-------------|---------------------|--|
| 03/01/2013 | Amos Odenyo | Submitted | NSO Submitted for Consideration |
| 03/01/2013 | Amos Odenyo | Sales Accepted | ok |
| 03/01/2013 | Amos Odenyo | Production Rejected | no |
| 03/01/2013 | Amos Odenyo | Sales Rejected | no |
| 03/01/2013 | Amos Odenyo | NSO Re-Submitted | The previous status of this NSO was: Sales Rejected |
| 03/01/2013 | Amos Odenyo | Sales Accepted | ok |
| 03/01/2013 | Amos Odenyo | Production Rejected | no |
| 03/01/2013 | Amos Odenyo | NSO Re-Submitted | The previous status of this NSO was: Production Rejected |

12 Comments listed.

50 ▼ Comments per page

Sales modules code revision

| | |
|---------------------|--|
| Defect #: | 001-00-1-10004 |
| Ticket #: | |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | With this release, our development team dedicated a significant amount of time in revising the 'behind the scenes' workings of the Sales Rep and Sales Management modules. While these updates do not result in immediate front end changes, they establish the foundation that we need to perform an overhaul that will combine the Sales Management and Sales Rep module into one Sales module, with detailed permissions. We will also be able enhance, streamline, and modernize the features, functionality, and user interface of the sales module. We appreciate your patience with us as we complete this vital process. |

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>Ability to edit the Quoted Description of a NSO when it has the 'Buyer Accepted' status</i> | |
|---|--|
| Defect #: | 001-00-1-12176 |
| Ticket #: | 001-00-206514 |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | NSO > Lot Matrix > NSOs (for a lot) > Manage The Quoted Description of a NSO can now be edited when the NSO had the 'Buyer Accepted' status. The field cannot be edited after the NSO status changes to 'Released.' |

| <i>Issue when applying a change order to a lot's activity list</i> | |
|---|--|
| Defect #: | 001-00-1-12062 |
| Ticket #: | 001-00-207383, 001-00-207708 |
| | <input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | Project Management > Lot Matrix > CO > Update Activity List When a change order is applied to an activity list, the activities for the options that are being added to the lot are added to the activity list. We have adjusted this process to ensure that no duplicate activities are added to the activity list. |

| <i>Issue when trying to finalize some agreements when using some versions of Internet Explorer or Google Chrome</i> | |
|--|---|
| Defect #: | 001-00-1-12011 |
| Ticket #: | 001-00-207347, 001-00-207360, 001-00-207526, 001-00-627, 001-00-207677, 001-00-207683 |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | Sales Rep > Buyers > Finalize When finalizing an agreement the application checks if the buyer has other pending workups, and gives the user an opportunity to delete those workups. This feature was not working on some versions of Internet Explorer and Chrome. This has been corrected. |

| <i>Issue with re-ordering schedule template tasks when using some versions of Internet Explorer</i> | |
|--|---|
| Defect #: | 001-00-1-12091 |
| Ticket #: | 001-00-207577 |
| | <input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | Data Library > Schedules > Manage Tasks > Re-order Tasks Template Schedule tasks could not be re-ordered using 'drag and drop' functionality when using some versions of Internet Explorer to view. This has been corrected. |

Issue with the Sales Rep > Buyers page when using Internet Explorer

| | |
|---------------------|--|
| Defect #: | 001-00-12065 |
| Ticket #: | 001-00-207212 |
| | <input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead |
| Description: | Sales Rep > Buyers When using some versions of Internet Explorer to view the buyers list in sales rep, this message was shown: "Only Secure content is displayed" Show all content?. This issue 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 6.4.0, Release date July 23rd 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 6.5.0, Release date November 12th 2013

Focus – User interface re-design

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