



BuildTopia

Version 6.3.1

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.....	9
BuildTopia Product Roadmap.....	11

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.

Addition of lot address to the lot fields on the Quick Schedule and Month Schedule

Defect #:	001-00-1-12485
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Project Management > Lot Matrix > Quick Schedule Project Management > Lot Matrix > Month Schedule Lot addresses have been added to the lot fields on the Quick Schedule and Month Schedule.
Screenshots:	

Project Management > Lot Matrix > Quick Schedule

Home > Amber Hills: Project Management > Lot Matrix > Project Quick Schedule

Lot Matrix Purchase Orders Trade Partners

Project Quick Schedule Lot Matrix | Day Schedule | Week Schedule | Month Schedule

Lots

- 00828 - 121 Main street
- 012
- 01a - Address at Lot Level
- 099
- 104
- 106 - 106 Main street

All Lots

All tasks with start date on or before:

Trade:

Trade Partner:

Actions

Update selected start/finish dates with:

Today's Date

Projected Date

Send notification message

Mark selected tasks with actual start or finish dates. If a task is completed, check it as finished.

Task	Trade	Trade Partner	POs	CP	<input type="checkbox"/> Update Start	<input type="checkbox"/> Update Finish	Actions
Lot 00828 - 121 Main street							
Pre-Construction Checklist Prepared				CP	<input type="checkbox"/> 06/03/2010	<input type="checkbox"/> 06/03/2010	Edit
Request Start Date					<input type="checkbox"/> 06/01/2010	<input type="checkbox"/> 06/01/2010	Edit

Project Management > Lot Matrix > Month Schedule

Home > Amber Hills: Project Management > Lot Matrix > Month Calendar

Lot Matrix Purchase Orders Trade Partners

Month Calendar for All Lots in Project Lot Matrix | Quick Schedule | Day Schedule | Week Schedule

Trade:

Trade Partner:

Lots

- 0001
- 00828 - 121 Main street
- 01 - 560 Market Ridge St
- 012

All Lots

Date:

Show Phases

Highlight Critical Path Tasks

Include Completed Tasks

Previous **April 2013** Next

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6

Update of the confirmation notifications when generating multiple emails/letters from the To Do List in Sales Rep

Defect #:	001-00-1-12323
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Sales Rep > To Do List > Generate All Emails Sales Rep > To Do List > Generate All Letters The confirmation notifications that are displayed when generating multiple emails/letters from the To Do List have been updated to a version that works better across all browsers.
Screenshots:	

Sales Rep > To Do List > Generate All Emails

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

Task View

Date Range
Today

Start Date End Date
04/15/2013 04/15/2013

Projects
Amber Hills Phase II

SR assigned to Prospects
My Prospects

SR assigned to Tasks
Odenyo, Amos

Prospect Type Code
-- All --

To Do List Broker Agent Open Tasks (2) | Mortgage Company Open Tasks (4) | Generate All Letters | Generate All Emails

Dismiss Tasks

Dismiss?	Task	Prospect/Buyer	Origin	Due Date	Count	Actions
<input type="checkbox"/>	@ test task 1		representative	04/03/2013	0	Generate Email Dismiss Reschedule
<input type="checkbox"/>	letter test 2		representative	04/03/2013	0	Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	letter test 1		representative	04/03/2013	0	Generate Letter Complete Dismiss Reschedule

3 To Do Task List listed.

50 Rows per page

Sales Rep > To Do List > Generate All Letters

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

Task View

Date Range
Today

Start Date End Date
04/15/2013 04/15/2013

Projects
Amber Hills Phase II

SR assigned to Prospects
My Prospects

SR assigned to Tasks
Odenyo, Amos

Prospect Type Code
-- All --

To Do List Broker Agent Open Tasks (2) | Mortgage Company Open Tasks (4) | Generate All Letters | Generate All Emails

Dismiss Tasks

Dismiss?	Task	Prospect/Buyer	Origin	Due Date	Count	Actions
<input type="checkbox"/>	@ test task 1		representative	04/03/2013	0	Generate Email Dismiss Reschedule
<input type="checkbox"/>	letter test 2		representative	04/03/2013	0	Generate Letter Complete Dismiss Reschedule
<input type="checkbox"/>	letter test 1		representative	04/03/2013	0	Generate Letter Complete Dismiss Reschedule

3 To Do Task List listed.

50 Rows per page

Updates to the Option Margin reports

Defect #:	001-00-1-12484
Ticket #:	001-00-206806
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Reports > Standard Reports > Bidding & Contracting > Option Margin Report Reports > Standard Reports > Bidding & Contracting > Option Margin Report w/o Standard Options (Project Level) Reports > Standard Reports > Sales Management > Option Margin Report Reports > Standard Reports > Sales Management > Option Margin Report w/o Standard Options (Project Level)</p> <p>These reports have been updated to run for individual plans, rather than by plan status. This reduces the amount of data that the report has to return, and will help prevent timing-out of the report before results are returned.</p> <p>*All plans is no longer an option</p>

Updates to the Option Cost Comparison reports

Defect #:	001-00-1-12488
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Reports > Standard Reports > Bidding & Contracting > Option Cost Comparison (Project Level) Reports > Standard Reports > Sales Management > Option Cost Comparison (Project Level)</p> <p>These reports have been updated to run for individual option categories, rather than by project. This reduces the amount of data that the report has to return, and will help prevent timing-out of the report before results are returned. 'All plans' is no longer an option.</p>

Updates to the standard Pricing Addendum and Buyer Summary print forms for Canadian accounts to show Canadian tax calculations

Defect #:	001-00-1-10689
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	<p>Sales Rep > Buyers > Printer Icon > Buyer Summary with Taxes Sales Rep > SPEC List > Printer Icon > Pricing Addendum with Taxes Sales Rep > Prospects > Printer Icon > Workup Summary with Taxes Sales Rep > Prospects > Printer Icon > Workup Summary by Category with Taxes Sales Rep > Prospects > Workups > Submit Agreement > View/Print Pricing Addendum with Taxes</p> <p>These new print forms have added to Canadian accounts. They include a breakdown of purchase price with appropriate taxes and rebates.</p>

Update to Job Cost Reports with the 'Projected Cost to Complete' column

Defect #:	001-00-1-12411
Ticket #:	001-00-153559
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>Reports > Standard Reports > Purchasing</p> <p>The column that used to be named 'Projected Cost to Complete' has been renamed 'Projected Total Cost' which is a better description of what the column shows; Committed Costs (costs from purchase orders), and Current Budget where purchase order have not been generated.</p> <ul style="list-style-type: none">- Job Base Cost Report (Project Summary)- Job Cost Report (Building Summary)- Job Cost Report (Lot Detail - Profit)- Job Cost Report (Lot Summary - Profit)- Job Cost Report (Lot Summary)- Job Cost Report (Lot Summary) Breakout- Job Cost Report (Lot Summary) Breakout (Option/NSO)- Job Cost Report (Project Summary)

Update to the Plan Proforma Budget by Trade with Option Detail report

Defect #:	001-00-1-12411
Ticket #:	001-00-153559
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>Reports > Standard Reports > Bidding and Contracting</p> <p>The Plan Proforma Budget by Trade with Option Detail report is now called 'Plan Proforma Budget by Trade Detail with Standard Options' which is a better description of what the report shows.</p>

Update to the Job Cost Summary - Management report

Defect #:	001-00-1-12614
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>Reports > Standard Reports > Purchasing > Job Cost Summary - Management</p> <p>The 'All Projects' option has been removed from the Job Cost Summary - Management report. This reduces the amount of data that the report has to return, and will help prevent timing-out of the report before results are returned.</p>

Defect Fixes

This section highlights corrections and defect fixes that have been applied to BuildTopia. Each item is identified by a ticket and / or defect number (where applicable) which tracks to our internal support and software development system. The product versions affected are listed with each item. There is also a description of the item with any relevant screenshots to detail the defect.

<i>Issue when trying to send template emails to Broker Agents and Mortgage Companies</i>	
Defect #:	001-00-1-12532
Ticket #:	001-00-209053
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Broker Agent/Mortgage Co List > Broker Agents > Email Amber Hills: Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies > Email In some cases an error message was shown when trying to send an email template from the Broker Agents or Mortgage Companies list in SR. This has been corrected.

<i>Updates to the 'Create Pending PO' & 'Create & Open PO' buttons on the manual purchase order generation page</i>	
Defect #:	001-00-1-12451
Ticket #:	001-00-209053
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Project Management > Purchase Orders > Generate Manual PO The 'Create Pending PO' & 'Create & Open PO' buttons on the manual PO generation page have been modified to prevent double-clicking, which could result in duplicate POs.

<i>Inclusion of documents uploaded by Trade Partners when searching for documents</i>	
Defect #:	001-00-1-12321
Ticket #:	001-00-153223, 001-00-207933
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Documents > Search Document counter for any entity > Associate Existing Document > Search Documents uploaded by Trade Partner users with the appropriate users were not included in search results in the Documents module, or when trying to associate a document to an entity. This has been corrected.

<i>Issue with the Country and State/Province fields when editing a project in the Admin section</i>	
Defect #:	001-00-1-12279
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Projects > Edit The project field has been corrected to show values based on the selected country.

Inconsistent results when using the search field on the Prospects list in Sales Rep

Defect #:	103-14-1-54
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects The search field on the prospects list was giving inconsistent results in some cases. 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 6.4.0, 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.