



BuildTopia

Version 6.3.2

Release Notes

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Product and Company Information

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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

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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.

Update of the default for the Price Options screen in Sales Management to 'Don't Apply'

Defect #:	001-00-1-12198
Ticket #:	001-00-206792
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Sales Management > Price Options > Edit Option Prices > Select Category The default for the Price Options screen in Sales Management has been changed to 'Don't Apply.' This was requested by multiple users to prevent unintentional price updates.

Screenshots:

Sales Management > Price Options > Edit Option Prices > Select Category

Lot Matrix	Price Plans	Price Options	Manage Buyers and SPECS	Follow-Up				
Price Options for Plan: A1 Abbington								
Category	Cabinets							
Flag Options with Incomplete Cost Information	<input type="checkbox"/> Options that have incomplete cost information will be denoted with a ▼. Note that this may slow down the loading of the page.							
Update Option Pricing	Calculate Retail Price on a <input type="text"/> Margin of <input type="text"/> % Rounding to the nearest <input type="text"/> \$			<input type="button" value="Calculate"/> <input type="button" value="Reset"/>				
Options								
Option Category	Option Code ▲	Option Description	Status	Cost	Current Retail Price	New Retail Price	Apply Select All	Don't Apply Select All
Cabinets	45002 KITCHEN CABINET #2/ test test	test test	Available	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cabinets	45003 KITCHEN CABINET #3		Available	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cabinets	45004 KITCHEN CABINET #4		Available	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>

Updates to the Broker Agent and Mortgage Company lists in Sales Rep

Defect #:	001-00-1-12393, 001-00-1-12394
Ticket #:	
	<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 tab Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab Broker Agent names on the Broker Agents list ins Sales Rep can now be clicked to go to View page. Similarly, Loan Officer names on the Mortgage Companies list in Sales Rep can now be clicked to go to View page.

Screenshots:

Sales Rep > Broker Agent/Mortgage Co List > Broker Agents tab

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
Broker Agent List Add Broker Agent Add Mortgage Company					
<div style="display: flex; justify-content: space-between;"> Broker Agents Mortgage Companies </div>					
Search: <input type="text"/>					
Broker Agent Name	Company	Phone Number	Fax	Email	Actions
Smith, Ann	Acme Realtors	(443) 111-3432			View Email Edit Delete
Boardman, Jack	Long & Foster Realtors	(240) 342-3423			View Email Edit Delete

Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab

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

Broker Agents **Mortgage Companies**

Search:

Loan Officer Name	Company	Phone Number	Fax	Email	Actions
Blel, Jessica	American Mortgages	(301) 555-1234	(301) 555-1236		View Email Edit Delete
Jones, Leon	Interim Finance	(240) 555-1111	(240) 555-8766		View Email Edit Delete

Updates to the Broker Agent and Mortgage Company lists in the Directory

Defect #:	001-00-1-12391, 001-00-1-12392
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Directory > Broker Agents Directory > Mortgage Companies Broker Agent names on the Directory > Broker Agents list can now be clicked to go to View page. Similarly, Loan Officer names on the Directory > Mortgage Companies list can now be clicked to go to View page.

Screenshots:

Directory > Broker Agents

To Do	Broker Agents	Mortgage Companies	Trade Partners	Project: All
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Broker Agent List Add A Broker Agent

Active Archived

Search:

Broker Agent Name	Company	Phone Number	Fax	Email	Actions
Abernathy, Elizabeth	Parr & Abernathy Realty, Inc.	(804) 731-7105 x12		lwetzel@G1440.com	View Email Edit Archive Delete
Adams, Jane	New Dominion Real Estate, Inc.	(804) 690-2752		aodenyo@buildtopia.com	View Email Edit Archive Delete
Adams, Pamela	Harris & Assoc, Inc	(804) 691-4491			View Email Edit Archive Delete

Directory > Mortgage Companies

To Do	Broker Agents	Mortgage Companies	Trade Partners	Project: All
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Mortgage Company List Add A Mortgage Company

Active Archived

Search:

Loan Officer Name	Company	Phone Number	Fax	Email	Actions
Ashley, Jack	Waterfield Mortgage Company	(245) 424		lwetzel@g1440.com	View Email Edit Archive Delete
Clinton, Brent	Wachovia	(240) 555-8642	(240) 555-8644	aodenyo@buildtopia.com	View Email Edit Archive Delete
Daily, Robert	Wells-Fargo	(240) 555-1468	(240) 555-1470		View Email Edit Archive Delete

Addition of Select/Clear all check boxes to the 'Do Not Bid' and 'Taxable' columns on the Edit Unit of Measure page

Defect #:	001-00-1-12502																					
Ticket #:																						
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead																					
Description:	Bidding & Contracting > Bids > Unit of Measure > Edit Select/Clear all check boxes have been added to the 'Do Not Bid' and 'Taxable' columns on the Edit Unit of Measure page.																					
Screenshots:	<p>Bidding & Contracting > Bids > Unit of Measure > Edit</p> <table border="1"> <thead> <tr> <th>Do Not Bid</th> <th>Activity Code</th> <th>Scope of Work</th> <th>Unit of Measure</th> <th>Budget</th> <th>Taxable</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>100 New Activity Name</td> <td>New Scope of Work</td> <td>HR</td> <td>\$63.00</td> <td><input checked="" type="checkbox"/></td> <td>\$58.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>UM5 UM Measurement activity</td> <td></td> <td>GAL</td> <td>\$73.00</td> <td><input checked="" type="checkbox"/></td> <td>\$69.00</td> </tr> </tbody> </table>	Do Not Bid	Activity Code	Scope of Work	Unit of Measure	Budget	Taxable	Amount	<input type="checkbox"/>	100 New Activity Name	New Scope of Work	HR	\$63.00	<input checked="" type="checkbox"/>	\$58.00	<input type="checkbox"/>	UM5 UM Measurement activity		GAL	\$73.00	<input checked="" type="checkbox"/>	\$69.00
Do Not Bid	Activity Code	Scope of Work	Unit of Measure	Budget	Taxable	Amount																
<input type="checkbox"/>	100 New Activity Name	New Scope of Work	HR	\$63.00	<input checked="" type="checkbox"/>	\$58.00																
<input type="checkbox"/>	UM5 UM Measurement activity		GAL	\$73.00	<input checked="" type="checkbox"/>	\$69.00																

Usability updates to the Base and Option tabs on the Proforma Budget pages

Defect #:	001-00-1-12263
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	<p>Bidding & Contracting > Proforma Budgets > Base Bidding & Contracting > Proforma Budgets > Options</p> <p>The following updates were made to the pages above to help improve ease of navigation:</p> <ul style="list-style-type: none"> - The Activity Code/Activity Package column has been broken up into 3 columns: Activity Package, Activity #, and Activity Name. - A new column, 'Status', has been added to show the activity status. - A new filter, 'Status', has been added to filter by activity status. - A new filter, 'Activity Package' has been added to filter by the activity packages available on the selected plan. - The order of columns has been changed to; Trade, Activity Package, Activity #, Activity Name, Scope of Work, Status, Current Proforma, Revised Proforma. - The 'Type' filter has been removed (referred to Activity Package type). <p>On the Option tab only:</p> <ul style="list-style-type: none"> - The order of columns has been changed to; Category, Option, Trade, Activity Package, Activity #, Activity Name, Activity Status, Current Proforma, Revised Proforma. - Change the name of the column 'Option Code to' 'Option'.

Updates to the filters on the To Do List in Sales Rep

Defect #:	001-00-1-12311
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	<p>Sales Management > To Do List</p> <p>The following updates have been made to the To Do List in Sales Rep based on feedback:</p> <ul style="list-style-type: none">- When the pre-defined date ranges are chosen (Today, Yesterday, Tomorrow, Next 7 Days, Next 30 Days), the date fields below show the actual dates for the date range and cannot be updated manually.- When the date range 'Custom' is chosen, the date fields can be updated manually.- When the date range 'Custom' is chosen, the 'Hide Overdue Tasks?' button is inactive so that only the tasks within the selected dates are displayed.

Update of wording on the Opt-Out Rule sales settings

Defect #:	001-00-1-12641
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	<p>Admin > Company Setup > Sales Settings</p> <p>The wording on the Opt Out Rule sales settings has been updated to clarify the functionality:</p> <ul style="list-style-type: none">- Updated from 'Delete' to 'Exempt - If a prospect opts out of a certain task type (Emails, Letters, and/or Phone Calls) campaign tasks of that type will not be created for them'- Updated from 'Dismiss' to 'Dismiss - If a prospect opts out of a certain task type (Emails, Letters, and/or Phone Calls) campaign tasks of that type will be created for them, but immediately marked as Dismissed'- Updated from 'No Opt Out' to 'No Opt Out - the Opt Out options will not be available for prospects.

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>Notification when the Generate All Letters/Emails links when there no tasks</i>	
Defect #:	001-00-1-12324
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Management > To Do List An error message was sometimes shown when the 'Generate All Letters' and 'Generate All Emails' links were clicked but there were no open letter/email tasks on the list. The following messages will now be shown: 'There are no letters/emails to be generated.'

<i>Issue with the document types available for email and Autosend email tasks for prospects</i>	
Defect #:	001-00-1-12396
Ticket #:	001-00-208897
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > Prospects > Tasks > Add Task Sales Rep > Prospects > Tasks > Task Name (Edit) When manually creating or editing an Email or Email (Autosend) task for a prospect, clicking on the magnifying glass shows a list of documents. The list incorrectly displayed other types of email documents. This has been corrected to display Sales Emails only.

<i>Issue with the Prospect Survey</i>	
Defect #:	001-00-1-12561
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep: Prospects > Survey When completing the survey for a prospect, if a required field was left blank, or no answer is selected, and 'Save' was clicked, all the answers completed for all the questions on the survey were cleared. This has been corrected so that answers are not lost.

<i>Issue with the Taxable field for Unit of Measure bids in Trade Partner accounts</i>	
Defect #:	001-00-1-12492
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Trade Partner Account: Bids > Unit of Measure > Edit The Taxable field for Unit of Measure bids has been corrected on Trade Partner accounts and is now no longer editable.

Issue when prospect letter tasks have documents that have tag errors

Defect #:	001-00-1-12592
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > To Do List Sales Rep > Prospects > Tasks An error message was shown when trying to generate a prospect letter task, but the letter has tag errors. Going forward the tag errors on the document will be displayed.

Issue with the Project State field on the Edit Company Info page

Defect #:	001-00-1-12312
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Company Info > Edit The choices shown for the Project State/Province field were not dependent on the selection made for the Country field. This issue has been corrected; American states will be shown when USA is selected, Canadian Provinces when Canada is chosen, and no options when any other country is chosen.

Correction to the 'Project Type' field for Critical Dates (Ontario projects only)

Defect #:	001-00-1-12231
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Projects > View Admin > Projects > Edit A correction has been made to the project field called 'Project Type' for Tarion Critical Dates functionality. It will only show on the Project View and Edit screens when the Project province is Ontario and Country is Canada.

Issue with phone numbers when editing Broker Agent and Mortgage Company information

Defect #:	001-00-1-12476
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Directory > Broker Agents > Edit Directory > Mortgage Companies > Edit Sales Rep > Broker Agent/Mortgage Co List > Broker Agents tab > Edit Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab > Edit Phone numbers saved in the Phone Number 1 and Phone Number 2 fields for Broker Agents and Mortgage Companies were cleared when editing a Broker Agent or Mortgage Company record. This has been corrected.

Issue with phone and fax numbers when editing users in Trade Partner accounts

Defect #:	001-00-1-12482
Ticket #:	001-00-208878, 001-00-209711
	<input type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Trade Partner account: Admin Users > Edit Admin > Company Information > Edit Company Info Admin > Company Information > Edit Remittance Info In Trade Partner accounts, when editing user information, company information, or remittance information, when any of the required fields was left blank the values in the Phone and Fax Number fields were cleared. This has been corrected.

Error message when adding a co-prospect

Defect #:	001-00-1-12671
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Prospect Summary > Add Co-prospects In some situations an error message was shown when adding a co-prospect. This has been corrected.

Issue with dismissed prospects tasks

Defect #:	001-00-1-12712
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Tasks > Task History > Task Name The assigned sales rep on dismissed tasks could be edited by going to the view page for the task. This has been corrected. Only notes can be edited on dismissed tasks.

Addition of plan information at the top of the Admin > Project > Plans > Lots page

Defect #:	001-00-1-12522
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead
Description:	Admin > Projects > Plans > Lots The plan name, number, and bedroom/sqft information was missing at the top of this page. This has been corrected.

Issue with display of plans on the expanded view of Lot information on the Lot List page in Sales Rep

Defect #:	001-00-1-12741
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > Prospects To prevent confusion the 'Delete' link will not be shown on the SR > Prospects list for co-prospects. Co-Prospects can still be managed from the prospect summary screen. Deleting a prospect from the Prospects list will delete associate prospects as well.

Issue with display of plans on the expanded view of Lot information on the Lot List page in Sales Rep

Defect #:	001-00-1-12605
Ticket #:	001-00-209160
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > Lot List When the 'Expand All' button or the expand triangles for individual lots were clicked on the page, the available plans for the lot were not displayed. This has been corrected.

Correction of the date format on the Create Date column on the SPEC List in Sales Rep

Defect #:	001-00-1-12642
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > SPEC List The date format on this page has been corrected.

Issue when clicking on the 'Home' link on the navigation link when on the Documents page

Defect #:	001-00-1-12662
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Home > Documents An error message was shown when clicking on the 'Home' link on the navigation link when on the Documents page. 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.