



BuildTopia

Version 6.3.3

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.....	10
BuildTopia Product Roadmap.....	12

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.

Ability to transfer new workups on sold lots to other available lots

Defect #:	001-00-1-12474																						
Ticket #:	001-00-207049																						
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input checked="" type="checkbox"/> BTLead																						
Description:	Sales Rep > Prospects > Workups > Transfer If a prospect has a workup on a lot, and the lot is sold to another prospect, that workup can be transferred to another available lot, so long as the same plan is available. Just as with other workup transfers, all lot-dependent options will be removed from the workup during the transfer process.																						
Screenshots:	<p>Home > Amber Hills: Sales Rep > Prospects > Workup List</p> <p>To Do Prospects Buyers Broker Agent/Mortgage Co List SPEC List Lot List</p> <p>Prospect: Terrell Suggs Search Prospects Add Prospect</p> <p>Summary Survey Workups Tasks Financials Broker Agent Info Mort Comp Info</p> <p>Workup List Create New Workup</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Workup</th> <th>Date</th> <th>Project Name</th> <th>Lot #</th> <th>Address</th> <th>Plan</th> <th>Base</th> <th>Premium</th> <th>Options</th> <th>Total Price</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>01/30/2013</td> <td>Amber Hills</td> <td>017</td> <td>127 Main street</td> <td>Abbington</td> <td>\$400,000.00 \$400,000.00</td> <td>\$0.00 \$0.00</td> <td>\$0.00 \$0.00</td> <td>\$408,000.00 \$408,000.00</td> <td>Not Available For Workup Transfer Delete</td> </tr> </tbody> </table> <p style="text-align: center; font-size: small;">Contact Us Terms & Conditions Privacy Notice User Agreement ©2013 BuildTopia. Version: 6.3.3.38 Trademark and Copyright Notice</p>	Workup	Date	Project Name	Lot #	Address	Plan	Base	Premium	Options	Total Price	Actions	1	01/30/2013	Amber Hills	017	127 Main street	Abbington	\$400,000.00 \$400,000.00	\$0.00 \$0.00	\$0.00 \$0.00	\$408,000.00 \$408,000.00	Not Available For Workup Transfer Delete
Workup	Date	Project Name	Lot #	Address	Plan	Base	Premium	Options	Total Price	Actions													
1	01/30/2013	Amber Hills	017	127 Main street	Abbington	\$400,000.00 \$400,000.00	\$0.00 \$0.00	\$0.00 \$0.00	\$408,000.00 \$408,000.00	Not Available For Workup Transfer Delete													
	<p>Home > Amber Hills: Sales Rep > Prospects > Workup List > Create New Workup</p> <p>To Do Prospects Buyers Broker Agent/Mortgage Co List SPEC List Lot List</p> <p>Prospect: Terrell Suggs</p> <p>Summary Survey Workups Tasks Financials Broker Agent Info Mort Comp Info</p> <p>Transfer Workup Workup List</p> <p>Select a Lot Select Lot 26</p> <p style="text-align: center; font-size: small;">Contact Us Terms & Conditions Privacy Notice User Agreement ©2013 BuildTopia. Version: 6.3.3.38 Trademark and Copyright Notice</p>																						

Addition of a message on the Edit Options pricing page if no options are selected

Defect #:	001-001-1-13513, 001-00-1-13216
Ticket #:	
	<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 a Category On the edit price options page, if the 'Save' or 'Save and Apply to Other Plans' buttons are clicked without 'Apply' selected for any options, an alert will be displayed.
Screenshots:	

Price Options for Plan: DES

Category: --- All Categories ---
 Flag Options with Incomplete Cost Information: 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 Margin of % Rounding to the nearest \$1

Options			Warning		Current Retail Price	New Retail Price	Apply Select All	Don't Apply Select All
Electrical	00000 Testing Option Activity	testi	'Apply' has not been selected for any option, please review the list to ensure that your updates are saved <input type="button" value="OK"/>		\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
1.Incentives	001 - INC01 Builder Incentive OPEN - 2006	Incer			\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
1.Incentives	001 - INC02 Builder Incentive LOT - 2006	Incer	Dependent	\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Electrical	ELE 01 Electrical Option		Available	\$200.00	\$500.00	<input type="text" value="\$500.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
Electrical	HVAC 01 HVAC Option		Available	\$300.00	\$200.00	<input type="text" value="\$200.00"/>	<input type="radio"/>	<input checked="" type="radio"/>
Plumbing	PLU 01 Plumbing Option		Available	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	<input type="radio"/>	<input checked="" type="radio"/>

6 Options listed. 50 Options per page

Verification of the Primary Contact field for prospects

Defect #: 001-00-1-12325, 001-00-1-12612

Ticket #:

BTBuilder
 BTSales
 BTService
 BTLead

Description: Sales Rep > Prospects > Add Prospect
Sales Rep > Prospects > Edit

While adding a new prospect or editing an existing prospect, if a selection is made on the Primary Contact field, the system will whether the selected field has a value. If there is no value the user will be prompted to enter a value. For example, if 'Home Phone' is selected as the Primary Contact, but the Home Phone field is blank a message will be shown to let the user know that the Home Phone is required since it has been selected as the Primary Contact method. Other usability updates we added to the Add and Edit prospect pages.

Screenshots:

Home > Rolling Hills : Sales Rep > Prospects > Add Prospect Info

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

Salutation: First Name: * M.I. Last Name: * Suffix: Associated Sales Rep: *
 Street Address 1: Street Address 2: City: State: Zip Code:
 Home Phone: Work Phone: Ext: Mobile Phone: Fax Number:
 Email Address (Primary): Email Address (Secondary):
 Comments:
 Visit Notes:
 Opt Out From Emails? Yes No
 Opt Out From Phones? Yes No
 Time to Contact: Prospect Status: Date Visited:
 New Prospect

Alert: Please enter a home phone

Addition of the 'processing symbol' when deleting a prospect takes a long time to complete

Defect #:	001-00-1-13201
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Rep > Prospects > Delete The process to delete a prospect can take more than few seconds, especially where there are co-prospects, notes, and or multiple visit dates. We have added a processing symbol that will be shown when this process is taking a while to communicate that the process is still running, and prevent any interruption.

Screenshots:

The screenshot shows the 'Prospect List' page in a web application. At the top, there are navigation tabs: 'To Do', 'Prospects' (selected), 'Buyers', 'Broker Agent/Mortgage Co List', 'SPEC List', and 'Lot List'. Below the tabs, there is a search bar and several dropdown menus for filters like 'Project', 'Prospects', 'My Prospects', 'Type Code', 'Status', and 'Source'. A table with columns for 'Code', 'Prospect Name', 'Email Address', 'Primary Contact', 'Status', 'Date Entered', 'Source', and 'Actions' is visible. The table contains one entry: 'Unassigned Fields, Jim' with status 'New Prospect' and date '07/27/2012'. The 'Actions' column for this entry includes links for 'Edit', 'Survey', 'Workup', 'Tasks', 'Email Financials', 'Broker Agent Info', 'Mortgage Info', and 'Delete'. A large red circular loading spinner is centered on the page, and a smaller red circular processing symbol is visible in the bottom right corner of the table area. At the bottom of the page, there is a footer with contact information and copyright notice.

Addition of the 'processing symbol' when deleting a terminated agreement takes a long time to complete

Defect #:	001-00-1-13202
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	Sales Management > Manage Buyers & SPECs > Terminated tab > Delete The process to delete a terminated agreement (with the associated buyer if selected) can take more than few seconds due to the amount of data involved. We have added a processing symbol that will be shown when this process is taking a while to communicate that the process is still running, and prevent any interruption.

Screenshots:

Delete Agreement for Doe, John, Lot No. 01-002.B-4

Manage Buyers and SPECs

Choose One

- Delete the Buyer(s)
- Move the Buyer(s) to Prospect List

Save Cancel



Updates to the lot dependent options screen

Defect #:	001-00-1-13218
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Admin > Projects > Lots > Lot Dependent Options A new column to display the Option Category for the options. Also, the options can now be filtered by Option Category and Status.

Screenshots:

Home > Admin > Edit Lot Dependent Options: 005, 1300 Ingleside Ct.

Edit Lot Dependent Options: 005, 1300 Ingleside Ct.

Back

Changes to the Lot Dependent options will not affect the options already on created workups, purchase agreements, or SPECs. Existing workups, purchase agreements, and SPECs will have to be manually updated.
 Also you must save you changes before searching, filtering, or sorting the list or all changes will be lost.

All Available All Unavailable All Mandatory Save Save & Exit Cancel

Search: Plan: All Category: All Status: All

Plan	Category	Option	Option Description	Status
A1 Abbington	1.Incentives	001 - INC02 Builder Incentive LOT - 2006	Incentive Detail	Available
A1 Abbington	Flooring	10001 CARPET/PAD UPGRADES	CARPET/PAD UPGRADES test	Available
A1 Abbington	Flooring	10002 HARDWOOD flooring	Brand: 6x6 Color: White 6" testiness	Unavailable
A1 Abbington	Flooring	10015 Hardwood--upgrade II		Mandatory
A1 Abbington	Exterior	50510 WALKOUT BASMENT		Unavailable

Tarion Critical Dates – Addition of a permission to control the ability to add Addenda

Defect #:	001-00-1-12235
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	A Sales role permission has been added to control the ability to add addenda to Tarion Critical Dates. This sales role will only be shown on Canadian accounts.

Screenshots:

Projects	Users	Imports	Company Info	Company Setup	BTService Setup
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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

Role name *

Permissions Check the permissions that this role should have

<p>Sales Rep</p> <input 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 <input checked="" type="checkbox"/> Allow SR to add addenda to closing	<p>Sales Manager</p> <input 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"/> Sales Manager Response to Offer	<input type="checkbox"/> Sales Agreement Terminated
<input type="checkbox"/> Option Pricing Updated	<input type="checkbox"/> New Change Order Submitted	<input type="checkbox"/> Plan Pricing Updated
<input type="checkbox"/> Agreement Submitted	<input type="checkbox"/> Change Order Response	

To Do	Prospects	Buyers	Broker Agent/Mortgage Co List	SPEC List	Lot List
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Buyer Report: Jack Black

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

Add/Edit Critical Dates * = Required Field

*Closing Type :

<p>Projected</p> <p>Firm Occupancy Date: 06/18/2013</p> <p>Outside Occupancy Date: 06/18/2014</p> <p>Purchaser Termination: 07/21/2014</p>	<p>Actual</p> <p>*Firm Occupancy Date: 06/18/2013</p> <p>Outside Occupancy Date: <input type="text"/></p> <p>Purchaser Termination: <input type="text"/></p> <p>Roof Completion Date: <input type="text"/></p>
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Notices

Firm Occupancy Due: 06/10/2013 Firm Occupancy Sent:

New Report - Plan Proforma Budget Options Detail

Defect #:	001-00-1-12473
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Reports > Standard Reports > Bidding & Contracting This new report provides the proforma budget figures, primary contract costs, and the comparison between the two for option activities on a plan grouped by option category.

Updates to the BTAccounting real-time integration with Microsoft Dynamics to support Dynamics 2011

Defect #:	001-00-1-10730, 001-00-1-10731
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Updates to the BTAccounting real-time integration with Microsoft Dynamics to support the 2011 version of Microsoft Dynamics. This update also included the support of lot level accounting codes.

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 view the base tab for Proforma Budgets in some cases</i>	
Defect #:	001-00-1-13186
Ticket #:	001-00-210712
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Bidding & Contracting > Proforma Budgets > Base tab In some cases, if a plan had a draw activity package that had some archived activities an error message would be shown when trying to view the proforma budget page. This issue has been corrected. Going forward draw packages will be shown as one line on the proforma budget screens. The saved proforma budget number will still be divided according to the percentages assigned to the activities within the package, and can be shown on reports and once the proforma budgets is copied onto lot original and current budgets.

<i>Issue with the taxable status of Unit of Measure bids in Trade Partner accounts</i>	
Defect #:	001-00-1-13152
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Trade Partner Account > Bids > Unit of Measure The taxable status of activities on some unit of measure bids was not updated correctly during the bid merge process. This has been corrected.

<i>Improvements to the process that deletes terminated agreements to improve speed</i>	
Defect #:	001-00-1-13193, 001-00-1-13231, 001-00-1-13264
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Sales Management > Manage Buyers & SPECS > Terminated > Delete Adjustments were made to the process that deletes terminated agreements and terminated buyers to improve the speed and efficiency of the process.

<i>Issue with documents uploaded via Homebuyer Homepages</i>	
Defect #:	001-00-1-10038
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Sales Rep > Buyers > Document counter Documents uploaded via the homebuyer homepage were not shown on the document count for buyers in SR > Buyers. This has been corrected.

Issue with name of email templates

Defect #:	001-00-12398
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLed
Description:	When a sales email template was created, the file name was set to the subject of the email rather than the name of the document. 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.