



BuildTopia

Version 6.4.0

Release Notes

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Product and Company Information

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Trademark and Patent 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 create different Homebuyer Homepage customer service notifications by project																																					
Defect #:	001-00-1-10369																																				
Ticket #:	001-00-150385																																				
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService <input type="checkbox"/> BTLead																																				
Description:	Admin > BT Service Setup > Homebuyer Homepage > Email Notification The homeowner confirmation and service rep notification emails for service requests made via the Homebuyer Homepage can now be set by project. Each project can have unique confirmation and notification emails. The email addresses that receive the notification emails can also be set by project.																																				
Screenshots:	<p>Home > Admin > BTService Setup Publish Customer Request Form</p> <p>Projects Users Imports Company Info Company Setup BTService Setup</p> <p>Customer Request Form Setup</p> <p>Warranty Service Team</p> <p>Permission Roles Rep Rotation General Settings</p> <p>Homeowner</p> <p>Custom Fields Associated People Homebuyer Homepage Warranties</p> <p>Requests</p> <p>Aging Levels Origins Custom Fields Dispositions Checklists Standards</p> <p>Customer Service Request Form Header</p> <p>This information will appear at the top of the homebuyer request submission page</p> <p>Requests will be addressed as soon as possible.</p> <p>Automatic Email Response & Email Notification</p> <table border="1"> <thead> <tr> <th>Project</th> <th>Send Return Email to Owners?</th> <th>Return Email Template</th> <th>Return Email From</th> <th>Notification Template</th> <th>Notification Recipients</th> </tr> </thead> <tbody> <tr> <td>Amber Hills</td> <td><input checked="" type="checkbox"/></td> <td>HBHP Request Notificat</td> <td>earl@cat.co</td> <td>HBHP Request Notificat</td> <td>csrep@builder.co</td> </tr> <tr> <td>Amber Hills Phase II</td> <td><input checked="" type="checkbox"/></td> <td>HBHP Request Notificat</td> <td>earl@cat.co</td> <td>HBHP Request Notificat</td> <td>csrep@builder.co</td> </tr> <tr> <td>Parkview Gardens</td> <td><input checked="" type="checkbox"/></td> <td>HBHP Request Notificat</td> <td>earl@cat.co</td> <td>HBHP Request Notificat</td> <td>csrep@builder.co</td> </tr> <tr> <td>Rolling Hills</td> <td><input checked="" type="checkbox"/></td> <td>HBHP Request Notificat</td> <td>earl@cat.co</td> <td>HBHP Request Notificat</td> <td>csrep@builder.co</td> </tr> <tr> <td>Silver Meadow Estates</td> <td><input checked="" type="checkbox"/></td> <td>HBHP Request Notificat</td> <td>earl@cat.co</td> <td>HBHP Request Notificat</td> <td>csrep@builder.co</td> </tr> </tbody> </table> <p>Save</p>	Project	Send Return Email to Owners?	Return Email Template	Return Email From	Notification Template	Notification Recipients	Amber Hills	<input checked="" type="checkbox"/>	HBHP Request Notificat	earl@cat.co	HBHP Request Notificat	csrep@builder.co	Amber Hills Phase II	<input checked="" type="checkbox"/>	HBHP Request Notificat	earl@cat.co	HBHP Request Notificat	csrep@builder.co	Parkview Gardens	<input checked="" type="checkbox"/>	HBHP Request Notificat	earl@cat.co	HBHP Request Notificat	csrep@builder.co	Rolling Hills	<input checked="" type="checkbox"/>	HBHP Request Notificat	earl@cat.co	HBHP Request Notificat	csrep@builder.co	Silver Meadow Estates	<input checked="" type="checkbox"/>	HBHP Request Notificat	earl@cat.co	HBHP Request Notificat	csrep@builder.co
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New company sales setting to control whether spec option prices get updated	
Defect #:	001-00-1-13213
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	Admin > Company Setup > Sales Settings A new setting has been added to the Sales Settings section: 'Update option prices on SPEC workups whenever option prices are updated?' The default setting for the setting will be 'Yes' which matches current functionality. If it is changed to 'No' specs will not be updated when option prices are updated.
Screenshots:	

Projects	Users	Imports	Company Info	Company Setup	BService Setup
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Sales Settings

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

Opt Out Rule for prospect campaign tasks

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
 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
 No Opt Out - the Opt Out options will not be available for prospects

Allow SR to edit buyer information?

Yes No

Require a comment when dismissing tasks?

Yes No

Restrict campaigns visible to a user to only show those that are associated to that user's projects?

Yes No

Update option prices on SPEC workups whenever option prices are updated?

Yes No

Save Reset

Separation of the 'Place Schedules on Hold' & 'Use the '01 No Variance' Code permissions

Defect #:	001-00-1-13503
Ticket #:	001-00-208981
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Admin > Company Setup > Project Mgmt. Roles > View/Edit In the Schedule group project management permissions there was permission called: Place Schedules On Hold & Use the '01 No Variance' Code. To add flexibility we have separated this permission into two different permissions: 'Place Schedules On Hold, Remove Holds' and 'Use the '01 No Variance' schedule variance code.'

Screenshots:

Projects	Users	Imports	Company Info	Company Setup	BService Setup
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Edit Project Mgmt. Role

General * Required

Role name *

Permissions Check the permissions that this role should have

<p>General</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Access PM Module <input checked="" type="checkbox"/> Edit Lot Information <input checked="" type="checkbox"/> View Trade Partners <input checked="" type="checkbox"/> Complete SPEC to PA Process 	<p>Purchase Orders</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Print Pending Purchase Orders <input checked="" type="checkbox"/> View Purchase Orders <input checked="" type="checkbox"/> Generate Purchase Orders <input checked="" type="checkbox"/> Create Manual Purchase Orders <input checked="" type="checkbox"/> Release Manual Purchase Orders <input checked="" type="checkbox"/> Edit Purchase Orders <input checked="" type="checkbox"/> Approve Purchase Orders <input checked="" type="checkbox"/> Partially Approve Purchase Orders <input checked="" type="checkbox"/> Void Purchase Orders <input checked="" type="checkbox"/> Re-open Purchase Orders <input checked="" type="checkbox"/> Reassign Purchase Orders <input checked="" type="checkbox"/> Edit Purchase Order Variance Codes 	<p>Activity List</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Activity Lists <input checked="" type="checkbox"/> Edit Activity List Schedule Tasks <input checked="" type="checkbox"/> Add Activities to Activity Lists <input checked="" type="checkbox"/> Edit Activity Lists <input checked="" type="checkbox"/> Delete Activities from Activity Lists <input checked="" type="checkbox"/> Access Update Wizard <input checked="" type="checkbox"/> View Budgets <input checked="" type="checkbox"/> Edit Original Budgets <input checked="" type="checkbox"/> Edit Current Budgets <input checked="" type="checkbox"/> Update Activity List with Change Orders 	<p>Schedule</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Schedules <input checked="" type="checkbox"/> Accept to Production & Generate Schedules <input checked="" type="checkbox"/> Approve Schedules <input checked="" type="checkbox"/> Pull Back Schedules <input checked="" type="checkbox"/> Edit Schedules <input checked="" type="checkbox"/> Edit Construction Log Variance Codes <input type="checkbox"/> Place Schedules On Hold, Remove Holds <input checked="" type="checkbox"/> Use the '01 No Variance' schedule variance code
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'Mobile - Text Message' added as an option for the primary contact for prospects

Defect #:	001-00-1-13488
Ticket #:	001-00-208729
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BLead
Description:	Sales Rep > Prospects > Edit Add 'Mobile - Text Message' as an option for Primary Contact for Prospects
Screenshots:	

Prospect: Mark Fay

Summary Survey Workups Tasks Financials Broker Agent Info Mort Comp Info

> [Delete] * = Required Field

Salutation: First Name: * M.I. Last Name: * Suffix: Associated Sales Rep: *

Street Address 1: Opt Out From Emails? Yes No

Street Address 2: Opt Out From Phones? Yes No

City: State: Zip Code: Time to Contact:

Home Phone: Mobile - Text Message

Work Phone: Ext: Prospect Status: Date Visited:

Mobile Phone: Email (primary) New Prospect Initial Visit: 05/16/2013

Fax Number: Email (secondary)

Usability – Updates to make it easier to update/remove multiple plans from lots at once

Defect #:	001-00-1-12177
Ticket #:	001-00-149821
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTSERVICE <input type="checkbox"/> BTLead
Description:	Admin > Projects > Lots > Plans Data Library > Plans > Projects > Lots These pages have been updated to make it easier to change the status of multiple plans on lots, and remove multiple plans from lots at the same time.

Screenshots:

Admin > Projects > Lots > Plans

Projects **Users** **Imports** **Company Info** **Company Setup** **BTSERVICE Setup**

Manage Plans for Lot: 005, 1300 Ingleside Ct. Associate Plan | Back

Search: Save Save & Exit Cancel

Plan Number	Plan Name ▲	Description	Status	<input type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
A1	Abbington	Amber Hills	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
B1	Barlow	Amber Hills	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
C1	Charleston	Amber Hills	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove

3 Plan Templates listed. 50 Plan Templates per page
Save Save & Exit Cancel

Data Library > Plans > Projects > Lots

Plans **Activities** **Options** **Template Budgets** **Schedules**

Project Unit Plan Mappings Associate Lots | Back

Plan #: A1 Plan Name: Abbington Sq. Ft./Bed/Bath: 3000/3.0/4.0

Search: Sales Status: All Construction Status: All Plan Status: All

Lot ▲	Sales Status	Construction Status	Plan Status	<input type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
2-A-05	Sold	Pending	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
A-01	Sold	Pending	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
A-02	Released for Sale	Pending	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
A-03	Released for Sale	Pending	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove
A-04	Released for Sale	Pending	Active	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Remove

5 Lots listed. 50 Lots per page
Save Save & Exit Cancel

Addition of the 'PO Number' field to the Activity List w/ Schedule Information data set

Defect #:	001-1-13485
Ticket #:	001-00-207270, 001-00-208927
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Reports > On Demand Reports > Sales > Sales Agreements 'Construction Start Date' and 'Release for Start Date' have been added to the Lot Information for the sales data sets listed above.
Screenshots:	

Addition of the 'PO Number' field to the Activity List w/ Schedule Information data set

Defect #:	001-1-13483
Ticket #:	001-00-206796
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Reports > On Demand Reports > Purchasing > Activity List w/Schedule Info data set 'PO Number' has been added to the Activity List Information section of this data set. It will show the PO number of purchase orders for the activities on the activity list.
Screenshots:	

Home > Reports > Select Report Columns

Standard Reports

Data Set: Activity List w/Schedule Information

Activity List Information

- | | | | |
|---|--|--|---|
| <input type="checkbox"/> Activity Code Name | <input type="checkbox"/> Cost Code Field 1 | <input type="checkbox"/> NSO Number | <input type="checkbox"/> Projected Variance |
| <input type="checkbox"/> Activity Code No + Name | <input type="checkbox"/> Cost Code Field 2 | <input type="checkbox"/> Open Purchase Orders | <input type="checkbox"/> Quantity |
| <input type="checkbox"/> Activity Code Number | <input type="checkbox"/> Cost Code Name | <input type="checkbox"/> Option Code Name | <input type="checkbox"/> Remaining Cost |
| <input type="checkbox"/> Activity Package Name | <input type="checkbox"/> Cost Code No + Name | <input type="checkbox"/> Option Code No + Name | <input type="checkbox"/> Selection Notes |
| <input type="checkbox"/> Activity Package No | <input type="checkbox"/> Cost Code Number | <input type="checkbox"/> Option Code Number | <input type="checkbox"/> Trade Name |
| <input type="checkbox"/> Activity Package No + Name | <input type="checkbox"/> Current Budget | <input type="checkbox"/> Original Budget | <input type="checkbox"/> Trade No + Name |
| <input type="checkbox"/> Approved Purchase Orders | <input type="checkbox"/> Lot Accounting Code | <input checked="" type="checkbox"/> PO Number | <input type="checkbox"/> Trade Number |
| <input type="checkbox"/> Base/Option/NSO | <input type="checkbox"/> Lot Number | <input type="checkbox"/> Projected Cost to Complete | <input type="checkbox"/> Unit of Measure |
| <input type="checkbox"/> Committed Cost | | | |

Usability – Addition of columns and filters to some list pages

Defect #:	001-00-1-13493
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Columns and filters to have been added to these lists as follows: - Data Library > Activities: New 'UM' filter added for the values of the UM column. - Data Library > Activities > Activity Packages: New column and filter called 'Type' showing the activity package type, Draw or Non-Draw. - Data Library > Activities > Activity Packages > Edit: New 'Trade' filter added for the values for the Trade column. - Data Library > Options > Edit > Activities tab: New 'Package' and 'Trade' filters added for the values of the Activity Package and Trade columns respectively.

Addition of filters to the Resource Loading report

Defect #:	001-00-1-13507
Ticket #:	001-00-209267
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Reports > Standard Reports > Scheduling > Resource Loading A new filter, Trade Partner, has been added to the report to make it possible to run the report for one trade partner at a time. This will also improve the report's performance.

Addition of filters to the Resource Loading report in Trade Partner accounts

Defect #:	001-00-1-13508
Ticket #:	001-00-209278
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BLead
Description:	Trade Partner account > Reports > Resource Loading New filters, Builder, Project, and Lot, have been added to the report to make it possible to get more specific results from the report. This will also improve the report's performance.

Usability updates to the Sales Rep > Prospects > Survey

Defect #:	001-00-1-12562, 001-00-1-12871
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 The prospects survey page has been updated to make it easier to use and show the questions in an easier to use format.

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 with enforcement of Opt-Out Rules settings for tasks when editing a prospect</i>	
Defect #:	001-00-1-13505
Ticket #:	001-00-212130
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	<p>Sales Rep > Prospects > Edit</p> <p>If the opt out settings for an existing prospect were changed, this message was shown on the screen besides the type of task: 'Warning: Has opted out of this task type!' This has been corrected to work the same way as when a prospect is being created:</p> <ul style="list-style-type: none"> - If the setting is 'Exempt' and an existing prospect is edited, the tasks for the opted out types are deleted. - If the setting is 'Dismiss' and an existing prospect is edited, the tasks for the opted out types should be created, but the status is set to 'Dismissed.'

<i>Issue with the 'Allow SR to edit buyer information?' Sales setting</i>	
Defect #:	001-00-1-13496
Ticket #:	001-00-212088, 001-00-212135
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input type="checkbox"/> BTLead
Description:	<p>Sales Rep > Prospects > Edit</p> <p>When the 'Allow SR to edit buyer information?' Sales setting was set to 'No' prospects and buyers could not be edited. This has been corrected so that it controls the ability to edit Buyers in Sales Rep only.</p>

<i>Issue when changing the prospect type code for a prospect and deleting the old tasks</i>	
Defect #:	001-00-1-13544
Ticket #:	001-00-212211, 001-00-212255, 001-00-212302, 001-00-212303
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	<p>Sales Rep > Prospects > Edit</p> <p>An error message was shown when changing the prospect type code of a prospect and choosing to delete their old tasks. This has been corrected.</p>

<i>Issue with manual entry of prospect visit dates</i>	
Defect #:	001-00-1-13422
Ticket #:	101-29-039051
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService <input checked="" type="checkbox"/> BTLead
Description:	<p>Sales Rep > Prospects > Add Prospect & Sales Rep > Prospects > Edit</p> <p>When adding or editing a prospect, the visit date field did not accept any typed in values, only the calendar could be used. This has been corrected.</p>

Issue with completion of pre-construction schedules and the lot status

Defect #:	001-00-1-13521
Ticket #:	001-00-211853
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	If a lot had a pre-construction schedule only, and all the tasks on that pre-construction schedule were completed, the lot status is changed from 'In Production' to 'Completed.' This has been corrected.

New Trade Partner Status, 'Contract Created' for Unit of Measure bids

Defect #:	001-00-1-13461
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 Trade Partner Accounts > Bids > Unit of Measure When Unit of Measure contracts are created from a Unit of Measure bid, the bid trade partner status will now change to 'Contract Created.'

Issue with the way history is shown on turnkey bids and contracts

Defect #:	001-00-1-13495
Ticket #:	001-00-212064
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	The status shown on the bid/contract history screen for turnkey bids and contracts was always the current bid/contract status instead of the status at the time the change was made. This has been corrected.

Issue when trying to create a Unit of Measure contract with future effective date

Defect #:	001-00-1-13243
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	An error message was shown when trying to create a Unit of Measure contract with future effective date. This has been corrected.

Issue when copying an NSO estimate when the old estimate has a document

Defect #:	001-00-1-12732
Ticket #:	001-00-209498
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService <input type="checkbox"/> BTLead
Description:	NSO > Estimate List > Copy An error message was shown when trying to copy an estimate from one NSO to another if the old NSO estimate was associated to a 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 6.5.0, Release date November 12th 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 6.6.0, Q1 2014

Focus – User interface re-design

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