



Version 6.4.1

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.

Revision of the prospect summary page and related prospect pages

Defect #:	001-00-13183, 001-00-1-14032, 001-00-1-14325, 001-00-1-14341		
Ticket #:			
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BService
Description:	<p>Sales Rep > Prospects > Prospect Name</p> <p>The prospect summary page has been revised to an updated, easier to use format. Prospect information is now placed on different tabs, and the actions are centralized to a drop down menu on the right side of the page.</p>		
Screenshots:			

Ability to add/edit/remove contingencies from finalized agreements

Defect #:	001-00-1-14052, 001-00-1-14321		
Ticket #:	001-00-213244, 001-00-213946, 001-00-214093, 101-29-042059		
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BService
Description:	<p>Sales Management > Manage Buyers & SPECs > Agreement Finalized</p> <p>Contingencies can now be added, edited and removed from finalized agreements by users who have a sales role with the permission.</p>		

Addition of notification messages when SPECs are submitted and accepted

Defect #:	001-00-1-9415		
Ticket #:	001-00-149569, 001-00-213248		
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BService
Description:	Admin > Company Setup > Sales Roles > View/Edit Two new messages are now available for sales roles; 'SPEC Submitted' & SPEC Accepted.' These messages will be sent for those respective actions within the application in the Messaging inbox, and will be forwarded for users who edit their profiles and turn on email forwarding for the messages.		
Screenshots:	<p>The screenshot shows the 'Edit Sale Role' configuration page for the 'Sales Manager' role. The 'Permissions' section is expanded, showing three categories: 'Sales Rep', 'Sales Messages', and 'Sales Manager'. Under 'Sales Messages', the checkboxes for 'SPEC Accepted' and 'SPEC Submitted' are checked. Under 'Sales Manager', the checkboxes for 'Sales Agreement Terminated' and 'Plan Pricing Updated' are checked. The 'Save' and 'Cancel' buttons are visible at the bottom right.</p>		

Change of SPEC status name from 'SPEC Complete' to 'SPEC Submitted'

Defect #:	001-00-1-14323		
Ticket #:			
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BService
Description:	Sales Rep > SPEC List Sales Management > Manage Buyers & SPEC - The 'SPEC Complete' link on the SPEC list in Sales Rep is now 'Submit SPEC.' - On the Manage Buyers and SPEC page the status 'SPEC Complete' is now 'SPEC Submitted.'		

Update to the changes of the filters on the Prospects list in Sales rep

Defect #:	001-00-1-14221, 001-00-1-14271		
Ticket #:	001-00-213954		
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BService
Description:	Sales Rep > Prospects - The prospects list is now sorted alphabetically by last name. - Changes to the filters on the Prospects list in Sales Rep will now be saved as long as the user is logged in.		

Addition of a 'Selected Plan' column to the Lot Matrix pages in Sales Management and Project Management

Defect #:	001-00-1-13612, 001-00-1-13613
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales Management > Lot Matrix Project Management > Lot Matrix A new column, 'Selected Plan' has been added to the lot matrix lists in Sales Management and Project Management. They show the number and name of the plan selected by the SPEC or Sale Agreement on the lot.

Screenshots:

Home > Amber Hills: Sales Management > Lot Matrix > Project Lots

Lot Matrix
 Price Plans
 Price Options
 Manage Buyers and SPECs
 Follow-Up

Project Lots

Expand All Collapse All

Search: Plan: All Sales Status: All Construction Status: In Production

Lot # ▲	Address	Selected Plan	Sales Status	Construction Status	Release	Actions
005	1300 Ingleside Ct.	A1 Abbington	Sold	In Production		0 Edit View Start Date: 09/01/2013
00828	121 Main street	C1 Charleston	Sold	In Production		1 Edit View Start Date: 12/17/2012
015	125 Main Street	A1 Abbington	Sold	In Production	Pull From Sale	0 Edit View
099		A1 Abbington	Sold - SPEC to PA	In Production		0 Edit View Start Date: 10/01/2012
101	101 Main Street	A1 Abbington	Released for Sale and SPEC	In Production		0 Edit View Start Date: 07/31/2013

Updates to the Manage Projects Page for Broker Agents

Defect #:	001-00-1-14241, 001-00-1-14261
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Directory > Broker Agents > Broker Agent Name > Manage Projects Sales Rep > Broker Agent/Mortgage Co List > Broker Agents tab > Broker Agent Name > Manage Projects - The 'Associate/Unassociate Projects' link has been renamed 'Manage Projects.' - The 'Select All' and 'Clear All' buttons have been replaced with a multi-select check box. - Columns have been added to show the project name and project status. - A search field and a project status filter have been added.

Screenshots:

Home > Directory > Broker Agents > Manage Project for Adams, Jane [Exit Directory](#)

To Do
 Broker Agents
 Mortgage Companies
 Trade Partners
 Project: All

Manage Project for Adams, Jane [Back](#)

Associated Unassociated

Search: Status: All

Project ▲	City/State/Zip	Status
<input type="checkbox"/> Amber Hills Phase II	Potomac, AB 20854	Active
<input type="checkbox"/> Silver Meadow Estates	Washington, OK 20019	Active
<input type="checkbox"/> Test Project	Baltimore, MD 20231	Active
<input type="checkbox"/> test project 3	College Place, MD 20111	Active

4 Projects listed. 50 Projects per page
[Associate Selected Projects](#)

Updates to the Manage Projects Page for Mortgage Companies

Defect #:	001-00-1-14241, 001-00-1-14262
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Directory > Mortgage Companies > Loan Officer Name > Manage Projects Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab > Loan Officer Name > Manage Projects - The 'Associate/Unassociate Projects' link has been renamed 'Manage Projects.' - The 'Select All' and 'Clear All' buttons have been replaced with a multi-select check box. - Columns have been added to show the project name and project status. - A search field and a project status filter have been added.
Screenshots:	

Manage Projects page to be shown after adding a new broker agent

Defect #:	001-00-1-14263
Ticket #:	001-00-213881, 001-00-214060
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Directory > Broker Agents > Broker Agent Name > Add A Broker Agent Sales Rep > Broker Agent/Mortgage Co List > Broker Agents tab > Broker Agent Name > Add A Broker Agent The manage projects screen will be show immediately after a new broker agent has been added. If accessed from within a project that project will automatically be associated to the new broker agent.

Manage Projects page to be shown after adding a new mortgage company

Defect #:	001-00-1-14264
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Directory > Mortgage Companies > Loan Officer Name > Add A Mortgage Company Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab > Loan Officer Name > Add A Mortgage Company The manage projects screen will be show immediately after a mortgage company has been added. If accessed from within a project that project will automatically be associated to the new mortgage company.

Update to the Broker Agents and Mortgage Companies lists

Defect #:	001-00-1-14231, 001-00-1-14232, 001-00-1-14233
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Directory > Broker Agents Directory > Mortgage Companies Sales Rep > Broker Agent/Mortgage Co List > Broker Agents tab Sales Rep > Broker Agent/Mortgage Co List > Mortgage Companies tab - Broker Agents are now sorted alphabetically by the broker agent name column. - Mortgage companies are now sorted alphabetically by the 'Company' column which is now the 1st column on the screen.

Addition of tags available for the email sections on the webkit prospect form

Defect #:	001-00-1-13262
Ticket #:	101-29-037829
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Webkit Prospect Form The following tags can now be used in the confirmation and notification emails for new WIK prospects: @@prospect_addr1@@ @@prospect_addr2@@ @@prospect_city@@ @@prospect_state@@ @@prospect_zip@@ @@prospect_city_state_zip@@

Pop-up notice for the Approved PO by Audit report

Defect #:	001-00-1-14242
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Accounting > Log > Printer icon in Action Column > Approved PO by Audit The following message will be shown when this report is generated since it is an intensive report that takes more than a few seconds to be generated: "We are generating the report. Thank you for your patience."

New tab for approved Purchase orders in Trade Partner accounts

Defect #:	001-00-1-13509
Ticket #:	001-00-209368
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Trade Partner accounts > Purchase Orders The column of Approved Purchase Orders in Trade Partner accounts has been split into two columns to make it easier to search for and find POs: Current to 6 months & 6 months and older.
Screenshots:	

Home Schedules Documents Bids Contracts Lots **Purchase Orders** Invoices Service Orders NSO Quotes

Home > Purchase Orders > Purchase Orders

Purchase Orders

Builder

Customer Support (old)

Project Trade

Lot # Lot Address

PO # PO Type

Expand All Collapse All Search Reset

Open **Approved - Current to 6 months** Approved - 6 months and older Void All

PO #	Project	Lot #	Address	Approved Date	Total Amount		Actions
AHM-10791-3	Amber Hills	012		06/04/2013	\$1,900.00	0	
AH-10758	Amber Hills	012		07/11/2013	\$8,443.00	0	
AH-10429	Amber Hills	202		09/03/2013	\$23.00	1	

3 Purchase Orders listed. 50 Purchase Orders per page

Update to the 'Forgot Password' functionality on the login page

Defect #:	001-00-1-13592
Ticket #:	001-00-212463
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Login page > Forgot Password The 'Forgot Password' functionality has been updated to show the following message to inactive users: 'The user profile for the email address you have entered is not active. Please contact the BuildTopia administrator in your organization.'

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 deleting terminated agreements and buyers</i>	
Defect #:	001-00-1-14001, 001-00-1-14191
Ticket #:	001-00-212596
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales Management > Manage Buyers & SPECS > Terminated tab > Delete When deleting terminated buyers the processing symbol would continue indefinitely sometimes, causing the page to time out. This has been corrected.

<i>Issue when deleting tasks that prospects have opted out of</i>	
Defect #:	001-00-1-13595
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales Rep > Prospects > Actions > Edit Prospect When editing a prospect and changing the prospect type code, the page asks the user if they want to delete the existing tasks. If they say yes, currently it deletes all open tasks for the prospect. This has been changed so that only the Follow-up Campaign tasks are deleted. This will prevent deletion of tasks manually created by users.

<i>Issue with the user recorded when additional visit dates are added</i>	
Defect #:	001-00-1-13593
Ticket #:	001-00-212503
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales Rep > Prospects > Edit When additional visit dates with visit notes were added to prospects the user shown in the history section was the assigned sales rep instead of the user logged in. This has been corrected.

<i>Correction of issue causing incorrect ordering of turnkey contracts</i>	
Defect #:	001-00-1-13621
Ticket #:	001-00-213040, 001-00-213049
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Bidding & Contracting > Contracts > Turnkey When a contract revision was created and finalized to replace an existing contract, the ordering of all contracts of that trade was disrupted. This has been corrected.

Correction to 'Summary' print form for turnkey bids and contracts

Defect #:	001-00-1-13525, 001-00-1-13592
Ticket #:	001-00-210728, 001-00-212463
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Bidding & Contracting > Bids/Contracts > Turnkey > Printer Icon > Summary - The Summary print form has been updated to show both activity code number and name - When the 'Summary' print form was generated for a turnkey bid or contract that has options with activity packages, some of the activities within the package were not shown on the generated 'Summary' print form. This has been corrected.

Issue with the document name of HTML emails

Defect #:	001-00-1-13539
Ticket #:	001-00-212312, 001-00-213365, 001-00-213473, 001-00-214376, 001-00-214399, 101-29-039810
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Documents > Profile > Edit The file name for email documents will now match the document name instead of the email subject.

Issue with the functionality to associate projects to documents

Defect #:	001-00-1-14218
Ticket #:	001-00-213570
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Documents > Profile > Associate/Unassociate Projects An error message was shown when trying to view the second page of associated or unassociated projects. This has been corrected.

Issue with the search field on the lot dependent options page

Defect #:	001-00-1-14203
Ticket #:	001-00-213544
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Lots > Lot Dependent Options The search function has been adjusted to include the Option Description column.

Issue with answer selection for 'Check Box' survey questions

Defect #:	001-00-1-13581
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Project > View > Edit Survey > Add Question > Check Box > Save > Answer The answer field has been corrected to not accept spaces only as an answer.

Correction of the override setting for BTAccounting (MS Dynamics integration)

Defect #:	001-00-1-13594
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Accounting > Setup The selection for the 'Override Project Company Account Code at Lot Level?' setting is now correctly saved.

Update to format of on-demand reports exported to MS Excel

Defect #:	001-00-1-13517
Ticket #:	001-00-210075
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Reports > On-Demand Reports > More Actions > Print Reports > On-Demand Reports > More Actions > Export (Excel) When the two selections above are chosen for an on-demand report, columns on the report with number will be exported to excel as numbers rather than text.

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

- Back-end preparation for cross-project functionality in Bidding and Contracting.
- Revision of more pages in the sales modules to prepare for customizable 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.