



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.

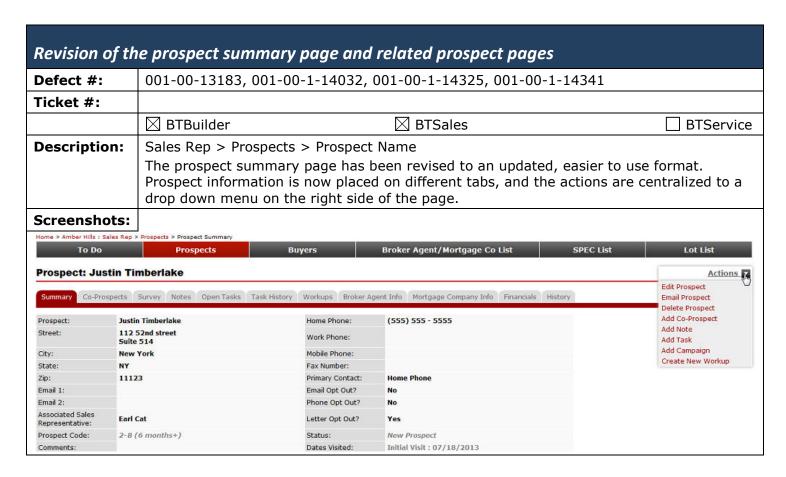
Telephone: 1 905 475-2209 or toll-free at 1 888 723-2222

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.



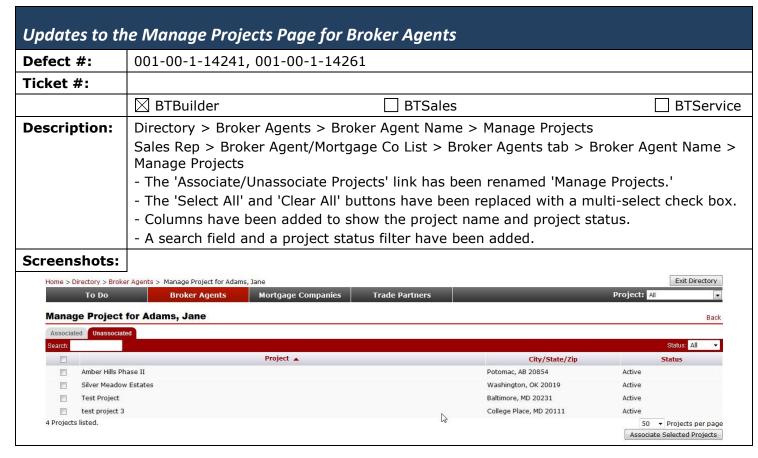
Ability to add	Ability to add/edit/remove contingencies from finalized agreements				
Defect #:	001-00-1-14052, 001-00-1-14321				
Ticket #:	001-00-213244, 001-00-213946, 001-00-214093, 101-29-042059				
	☑ BTBuilder ☑ BTSales ☐ BTService				
Description:	Sales Management > Manage Buyers & SPECs > Agreement Finalized				
	Contingencies can now who have a sales role	w be added, edited and removed from finalized with the permission.	d agreements by users		

Addition of n	otification messo	ages when S	SPECs are submitte	d and accepted	
Defect #:	001-00-1-9415				
Ticket #:	001-00-149569,	001-00-2132	48		
			BTSales		☐ BTService
Description:	Admin > Compar	y Setup > Sa	les Roles > View/Edit	<u> </u>	
	These messages	will be sent fo and will be fo	or those respective ac	s; 'SPEC Submitted' & s tions within the applica no edit their profiles ar	ation in the
Screenshots:					
Home> Admin > Edit Sale Rol					
Projects Edit Sale Role	Users	Import	s Company Info	Company Setup	BTService Setup
General					* Required
Units of Measure	Role name *	Sales Manager			
Payment Terms	Permissions			Check the permission	ns that this role should have
Variance Codes Salutations Budget Settings Purchasing Settings Document Settings Document Folders	Sales Rep Sales Rep Read Only Sales Rep Read/Write Reschedule Tasks Send Mass emails via Adv View Prospects and Tasks		,	Sales Manager Sales Manager Read Only Sales Manager Read/Write Delete Terminated Agreements Add/Edit/Remove Contingency Dates Edit Agreement Dates	
Report Settings Print Form Settings	Sales Messages			Check the messages that users	with this role should receive
Data Upload Wizard Lot Custom Fields Project Custom Fields		aet.			nated
User Custom Fields	Option Pricing Updated	nuo.	Change Order Response		R
Sales					Save Cancel

Change of SF	Change of SPEC status name from 'SPEC Complete' to 'SPEC Submitted'				
Defect #:	001-00-1-14323				
Ticket #:					
	BTBuilder	BTSales	☐ BTService		
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 Submitted.'	s and SPEC page the status 'SPEC Comp	olete' is now 'SPEC		

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				
	□ BTBuilder	□ BTSales	☐ BTService		
Description:	·				
 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.	s on the Prospects list in Sales Rep will now	be saved as long as the		

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 #: □ BTBuilder □ BTSales BTService **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:** Hիրը > Amber Hills: Sales Management > Lot Matrix > Project Lots **Price Options Project Lots** Expand All Collapse All Plan: All ▼ Sales Status: All Construction Status: In Production Address **Construction Status** 0 Actions 005 1300 Ingleside Ct. A1 Abbinaton Sold In Production ≥ Edit | View Start Date: 09/01/2013 00828 121 Main street C1 Charleston Sold In Production Edit | Viev Start Date: 12/17/2012 ▶ 015 125 Main Street A1 Abbington Sold In Production Edit | View 099 A1 Abbington Sold - SPEC to PA In Production Start Date: 10/01/2012 101 A1 Abbington Start Date: 07/31/2013 101 Main Street Released for Sale In Production



Updates to th	ne Manage Projects	Page for Mortgag	e Companies		
Defect #:	001-00-1-14241, 003	1-00-1-14262			
Ticket #:					
		☐ B	TSales		BTService
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.				
Manage Associated Search:	Project for Long and Foster Unassociated mber Hills mber Hills Phase II arkview Gardens ilver Meadow Estates	g and Foster Mortgage Companies Trade Parti	City/State/Zip Rockville, MD 20850 Potomac, AB 20854 Riverdale, MD 20737 Washington, OK 20019	Project: All Status Active Active Active Active Active	s ects per page

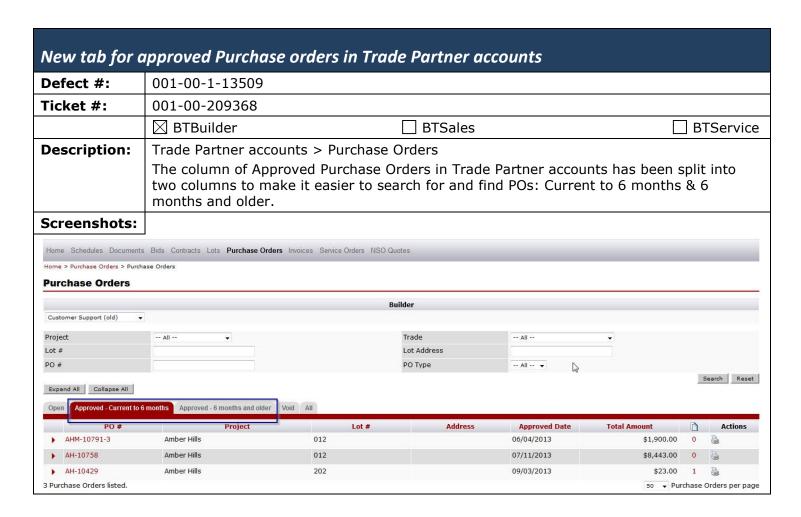
Manage Projects page to be shown after adding a new broker agent					
Defect #:	001-00-1-14263				
Ticket #:	001-00-213881, 001-00-214060				
	BTBuilder	BTSales	☐ BTService		
Description:	Sales Rep > Broker Age Add A Broker Agent The manage projects so	nts > Broker Agent Name > Add A Broker ent/Mortgage Co List > Broker Agents tab creen will be show immediately after a nev n within a project that project will automat	> Broker Agent Name > v broker agent has been		

Manage Pro	Manage Projects page to be shown after adding a new mortgage company					
Defect #:	001-00-1-14264					
Ticket #:						
	BTBuilder	□ BTSales	☐ BTService			
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					
		screen will be show immediately after a mor ed from within a project that project will aut company.				

Update to the Broker Agents and Mortgage Companies lists					
Defect #:	001-00-1-14231, 001-00-	-1-14232, 001-00-1-14233			
Ticket #:					
	BTBuilder		☐ BTService		
Description:	Sales Rep > Broker Agent - Broker Agents are now s	npanies :/Mortgage Co List > Broker Agents tab :/Mortgage Co List > Mortgage Compan sorted alphabetically by the broker agen e now sorted alphabetically by the 'Com	nies tab nt name column.		

Addition of tags available for the email sections on the webkit prospect form					
Defect #:	001-00-1-13262				
Ticket #:	101-29-037829				
	BTBuilder	BTSales	☐ BTService		
Description:	WIK prospects: @@prospect_addr1@@ @@prospect_addr2@@ @@prospect_city@@ @@prospect_state@@ @@prospect_zip@@	ct Form I in the confirmation and notification of	emails for new		
	@@prospect_state@@				

Pop-up notice for the Approved PO by Audit report				
Defect #:	001-00-1-14242			
Ticket #:				
	BTBuilder	☐ BTSales	☐ BTService	
Description:	The following message	rinter icon in Action Column > Approved PO by e will be shown when this report is generated s e than a few seconds to be generated: "We are your patience."	since it is an intensive	



Update to the	Update to the 'Forgot Password' functionality on the login page					
Defect #:	001-00-1-13592					
Ticket #:	001-00-212463					
	BTBuilder	BTSales	BTService			
Description:						

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.

Jagua whan a		voomonte and hunore	
Defect #:	leleting terminated agi	•	
Ticket #:	001-00-1-14001, 001-00	J-1-14191	
ricket #:		BTSales	BTService
Description:	 		
Description:	When deleting terminate	nage Buyers & SPECs > Terminated tab d buyers the processing symbol would co page to time out. This has been correcte	ontinue indefinitely
Issue when d	leleting tasks that pros	pects have opted out of	
Defect #:	001-00-1-13595		
Ticket #:			
	BTBuilder		☐ 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.		
Issue with th	e user recorded when o	additional visit dates are added	
Defect #:	001-00-1-13593		
Ticket #:	001-00-212503		
	⊠ BTBuilder	⊠ BTSales	☐ BTService
Description:	Sales Rep > Prospects >	_	
Description	When additional visit dat	tes with visit notes were added to prospensing sales rep instead of the user log	
Correction o	f issue causing incorrec	t ordering of turnkey contracts	
Defect #:	001-00-1-13621		
Ticket #:	001-00-213040, 001-00-	-213049	
	□ BTBuilder	☐ BTSales	☐ BTService
Description:		Contracts > Turnkey was created and finalized to replace an of that trade was disrupted. This has bee	

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		
	BTBuilder	☐ BTSales	☐ BTService	
Description:	Bidding & Contracting	> Bids/Contracts > Turnkey > Printer Icon >	> Summary	
	- When the 'Summary options with activity	form has been updated to show both activity ' print form was generated for a turnkey bid packages, some of the activities within the p ummary' print form. This has been corrected.	or contract that has ackage were not shown	

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				
	BTBuilder	BTSales			
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			
	BTBuilder	□ BTSales	□ 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			
		BTSales	☐ BTService	
Description:	Admin > Projects > L	ots > 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 #:				
	BTBuilder		☐ BTService	
Description:	Admin > Project > V	iew > 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 #:				
		☐ BTSales	☐ BTService	
Description:	Accounting > Setup The selection for the correctly saved.	'Override Project Company Account Code at Lot Level?'	' setting is now	

Update to format of on-demand reports exported to MS Excel				
Defect #:	001-00-1-13517			
Ticket #:	001-00-210075			
	□ BTBuilder		BTService	
Description:	Reports > On-Demand	Reports > More Actions > Print		
	Reports > On-Demand Reports > More Actions > Export (Excel)			
		ns above are chosen for an on-demand report, colu Il 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.