Version 6.5.0

Release Notes

Table of Contents

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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.
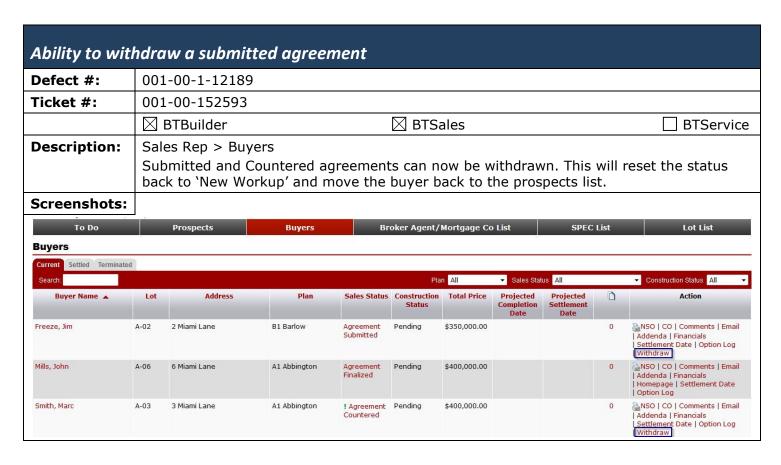
Telephone: 1 905 475-2209 or toll-free at 1 888 723-2222
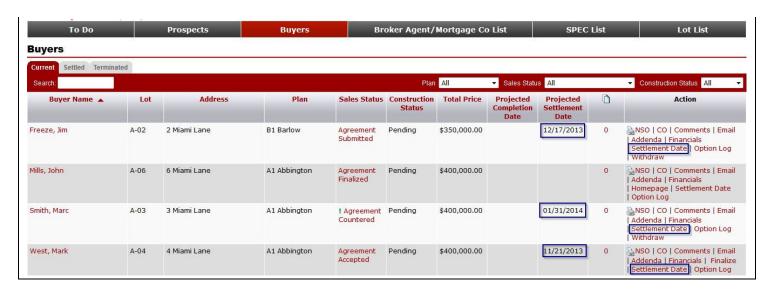Fax: 1 905 475-7204
Web: http://www.constellationhb.com

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 withdraw a submitted agreement

Defect #:	001-00-1-12189		
Ticket #:	001-00-152593		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Rep > Buyers Submitted and Countered agreements can now be withdrawn. This will reset the status back to 'New Workup' and move the buyer back to the prospects list.		
Screenshots:			

Ability to set projected settlement dates on submitted, countered, and accepted agreements

Defect #:	001-00-1-14632		
Ticket #:	001-00-213841		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Rep > Buyers > Current tab Projected settlement dates can now be entered on submitted, countered, and accepted agreements.		
Screenshots:			

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

Buyers

Current Settled Terminated

Search: [   ]   Plan All ▼ Sales Status All ▼ Construction Status All ▼

Buyer Name ▲	Lot	Address	Plan	Sales Status	Construction Status	Total Price	Projected Completion Date	Projected Settlement Date	📄	Action
Freeze, Jim	A-02	2 Miami Lane	B1 Barlow	Agreement Submitted	Pending	$350,000.00		12/17/2013	0	👤NSO	CO	Comments	Email	Addenda	Financials	Settlement Date	Option Log	Withdraw
Mills, John	A-06	6 Miami Lane	A1 Abbington	Agreement Finalized	Pending	$400,000.00			0	👤NSO	CO	Comments	Email	Addenda	Financials	Homepage	Settlement Date	Option Log
Smith, Marc	A-03	3 Miami Lane	A1 Abbington	! Agreement Countered	Pending	$400,000.00		01/31/2014	0	👤NSO	CO	Comments	Email	Addenda	Financials	Settlement Date	Option Log	Withdraw
West, Mark	A-04	4 Miami Lane	A1 Abbington	Agreement Accepted	Pending	$400,000.00		11/21/2013	0	👤NSO	CO	Comments	Email	Addenda	Financials	Finalize	Settlement Date	Option Log

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Setting to automatically change prospect type when agreement is finalized

Defect #:	001-00-1-13534
Ticket #:	001-00-211686
	☒ BTBuilder ☒ BTSales ☐ BTService
Description:	Admin > Company Setup > Sales Settings A new sales setting has been added: 'Automatically update a buyer's Type Code when their agreement is finalized:' The selected prospect type code will be added to a buyer when the status of their agreement changes to 'Agreement Finalized.' If the Type Code is associated to campaigns in that project the campaign tasks will be added to the buyer.
Screenshots:	

Setting to automatically change prospect type when agreement is settled

Defect #:	001-00-1-14571		
Ticket #:	001-00-211686		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Admin > Company Setup > Sales Settings		
	A new sales setting has been added: 'Automatically update a buyer's Type Code when their agreement is settled:' The selected prospect type code will be added to a buyer when the status of their agreement changes to 'Settled.' If the Type Code is associated to campaigns in that project the campaign tasks will be added to the buyer.		
Screenshots:			

Usability Updates to the 'Edit PO Task Relationships' page

Defect #:	001-00-1-14554		
Ticket #:			
	☒ BTBuilder	☐ BTSales	☐ BTService
Description:	PM > Lot Matrix > Review Schedule > Edit PO Task Relationships		
	The changes below have been made to this page to improve usability:		
	- The purchase order number can now be clicked to view details.		
	- A Task filter has been added.		
	- 'Save' and 'Cancel' buttons have been added to the bottom of the page.		

Updated process for purchase order generation to ensure duplicates cannot be created

Defect #:	001-00-1-14215		
Ticket #:	001-00-212888, 001-00-213675, 001-00-214061		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Project Management > Purchase Orders > Generate Purchase Orders Purchase order generation will now happen as part of a queued process. This means that if one user generates purchases of a lot, it will temporarily unavailable for PO generation for any other users until that batch of purchase orders has been generated. After the generation is completed the lot will be available again, and that group of purchase orders will be shown as a batch marked by the date and time of generation.		
Screenshots:			

This first screen shot shows the list with two lots that are in the process of generating purchase orders.

Home > Amber Hills: Project Management > Purchase Orders > Purchase Order Generation

Lot Matrix	Purchase Orders	Trade Partners

Purchase Order Generation   Back

PO(s) Add to Queue to Generated

Lots w/POs To Generate

Search:

Lot # ▲	Construction Status	Sales Status	Lot Po History	Generate POs...
005	In Production	Sold	Batch ▼	Po Generation in Process ...
00828	In Production	Sold	Batch ▼	Po Generation in Process ...
01	Completed	Settled - SPEC to PA	Batch ▼	By Trade | By Activity List
012	Completed	Sold	Batch ▼	By Trade | By Activity List
013	Completed	Sold	Batch ▼	By Trade | By Activity List
015	In Production	Sold	Batch ▼	By Trade | By Activity List
01a	Completed	Sold - SPEC to PA	Batch ▼	By Trade | By Activity List

The screen shot below shows the lots when the process has completed. Clicking on the 'Batch' link shows the list of groups of purchase orders created, and clicking on one if those links shows the list of those POs.

Home > Amber Hills: Project Management > Purchase Orders > Purchase Order Generation

Lot Matrix	Purchase Orders	Trade Partners

Purchase Order Generation   Back

Lots w/POs To Generate

Search:

Lot # ▲	Construction Status	Sales Status	Lot Po History	Generate POs...
005	In Production	Sold	Batch ▼	By Trade | By Activity List
00828	In Production	Sold	005 (11-05-2013 09:27) 005 (11-05-2013 09:28)	By Trade | By Activity List
012	Completed	Sold	005 (11-06-2013 09:12) 005 (11-06-2013 09:12)	By Trade | By Activity List
013	Completed	Sold	005 (11-06-2013 11:44) 005 (11-06-2013 11:44)	By Trade | By Activity List
015	In Production	Sold	005 (11-06-2013 19:19) 005 (11-07-2013 09:03)	By Trade | By Activity List
01a	Completed	Sold - SPEC to PA		By Trade | By Activity List

New NSO permission to control deletion of new NSOs

Defect #:	001-00-1-14648		
Ticket #:	001-00-213606		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Admin > Company Setup > NSO Roles > View/Edit A new NSO permission has been added called 'Delete New NSO.' Users with NSO roles that include this permission they will be able to see the 'Delete' link when a NSO status is still 'New' on these pages: NSO > Lot Matrix > NSO(s) for a lot NSO > NSO List > Pending Tab This permission has been turned on for all existing NSO permissions roles, and can be adjusted by going to Admin > Company Setup > NSO Roles > View/Edit.		
Screenshots:			

Usability updates to the Manage Projects page for documents

Defect #:	001-00-1-14344		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☒ BTService
Description:	Documents > Profile > Manage Projects The changes below have been made to this page to improve usability: - 'Select All' and 'Clear All' buttons have been replaced with multi-select check boxes - Columns for Project City/State/Zip and Project Status have been added - A search field has been added - A status filter has been added		

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.

Issue with archived plans when creating a new workup

Defect #:	001-00-1-14511		
Ticket #:	001-00-215113		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Rep > Prospects > Workups > Actions > Create New Workup Plans that have a status of 'Archived' on the lot were displayed when creating a new workup. This has been corrected.		

Issue when creating a new workup with a lot that has a SPEC

Defect #:	001-00-1-14732		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Rep > Prospects > Workups >Actions > Create New Workup When creating a new workup on a lot that has a SPEC, only the plan that is on the SPEC workup should be shown on the drop down. In some cases all the lot plans were being shown. This has been corrected.		

Issue with submitted SPECs when a purchase agreement is accepted

Defect #:	001-00-1-14801		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	SM > Manage Buyers and SPECs When a buyer's agreement is accepted on a lot that has a submitted SPEC, the submitted SPEC should be terminated, which was not happening in some cases. This has been corrected.		

Issue with the option price update message notification

Defect #:	001-00-1-14442		
Ticket #:	001-00-214779		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Management > Option Prices > Edit Option Prices When option prices are updated the message notification sent sometimes included more options that the ones that were updated. This has been corrected.		

Processing symbol shown indefinitely when deleting some prospects

Defect #:	001-00-1-14682		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Sales Rep > Prospects > Delete In some cases deleting a prospect from the prospects list would cause the processing symbol is shown indefinitely. This has been corrected.		

Attribute drop down choices sorted alphabetically

Defect #:	001-00-1-14555		
Ticket #:	001-00-215419		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	SR > Prospects > Workups > Select Options SR > Buyers > CO > Edit SR > SPEC List > Select Options SR > SPEC List > CO > Edit The attribute drop down choices are now sorted alphabetically.		

Issue with editing the status of option activities

Defect #:	001-00-1-14524		
Ticket #:	001-00-215241, 001-00-215873		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Data Library > Options > Edit > Edit Activities The status of option activities on this page could not be changed then saved to plans. This has been corrected.		

Update to the save and flowdown page for options

Defect #:	001-00-1-14802, 001-00-1-14803		
Ticket #:	001-00-216122		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	DL > Options > Edit > Save and Update Plans On the Save and Update plans page for option details, if the check boxes for option details at the top then were checked, then the filters or the list count for the plans the selections made for the check boxes were cleared. This has been corrected. Also, on both pages 'Select All' and 'Clear All' buttons were replaced with check boxes.		

Issue with the Purchase Order approved message for Trade Partners

Defect #:	001-00-1-14219		
Ticket #:	001-00-213456		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Project Management > Purchase Orders When Purchase Orders are approved for multiple Trade Partners each Trade Partner gets a PO Approved message. In some cases the messages were showing POs that belonged to other Trade Partners. This has been corrected.		

Issue with the expiration date on turnkey contracts

Defect #:	001-00-1-14541		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	BC > Contracts > Turnkey > Edit The Expiration Date field on the edit page for turnkey contracts was always blank which caused users to sometimes remove the expiration date by mistake. This has been corrected.		

Issue with projects shown on the create Unit of Measure bid page

Defect #:	001-00-1-14821		
Ticket #:	001-00-216183		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	BC > Bids > Create > Unit of Measure When there are a lot of projects on this page the buttons were hidden by the projects list. This has been corrected.		

Updates to comments on checklist items on customer service requests

Defect #:	001-00-1-12721		
Ticket #:	101-29-035982		
	☒ BTBuilder	☒ BTSales	☒ BTService
Description:	CS: Requests > Request # > Checklist link Comments could not be saved on request checklist items. This has been corrected.		

Addition of a status filter on the BTAccounting Queue tabs

Defect #:	001-00-1-14474		
Ticket #:			
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Home > Accounting (BTAccounting customers only) A status filter has been added the BTAccounting Queue tabs.		

Issue with email addresses that have one letter in the domain name

Defect #:	001-00-1-14382		
Ticket #:	001-00-213705		
	☒ BTBuilder	☒ BTSales	☒ BTService
Description:	All email fields on add and edit screens		
	When an email with one letter (e.g. john@q.com) in the domain name is entered (e.g. john@q.com) could not be saved. This has been corrected.		

Option name on the /NSO field on the Purchase Order view page in TP accounts

Defect #:	001-00-1-14604		
Ticket #:	001-00-213359		
	☒ BTBuilder	☒ BTSales	☐ BTService
Description:	Trade Partner account > Purchase Orders > PO#		
	The Option/NSO field was showing the option number only. It has been corrected to show both the option number and name.		

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2014. 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 6.6.0, Q1 2014

Focus – Usability updates

- Usability updates to the sales modules.
- Usability updates to bidding and contracting.

Version 6.6.1, Q2 2014

Focus – User interface re-design

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