



Version 6.6.2

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)

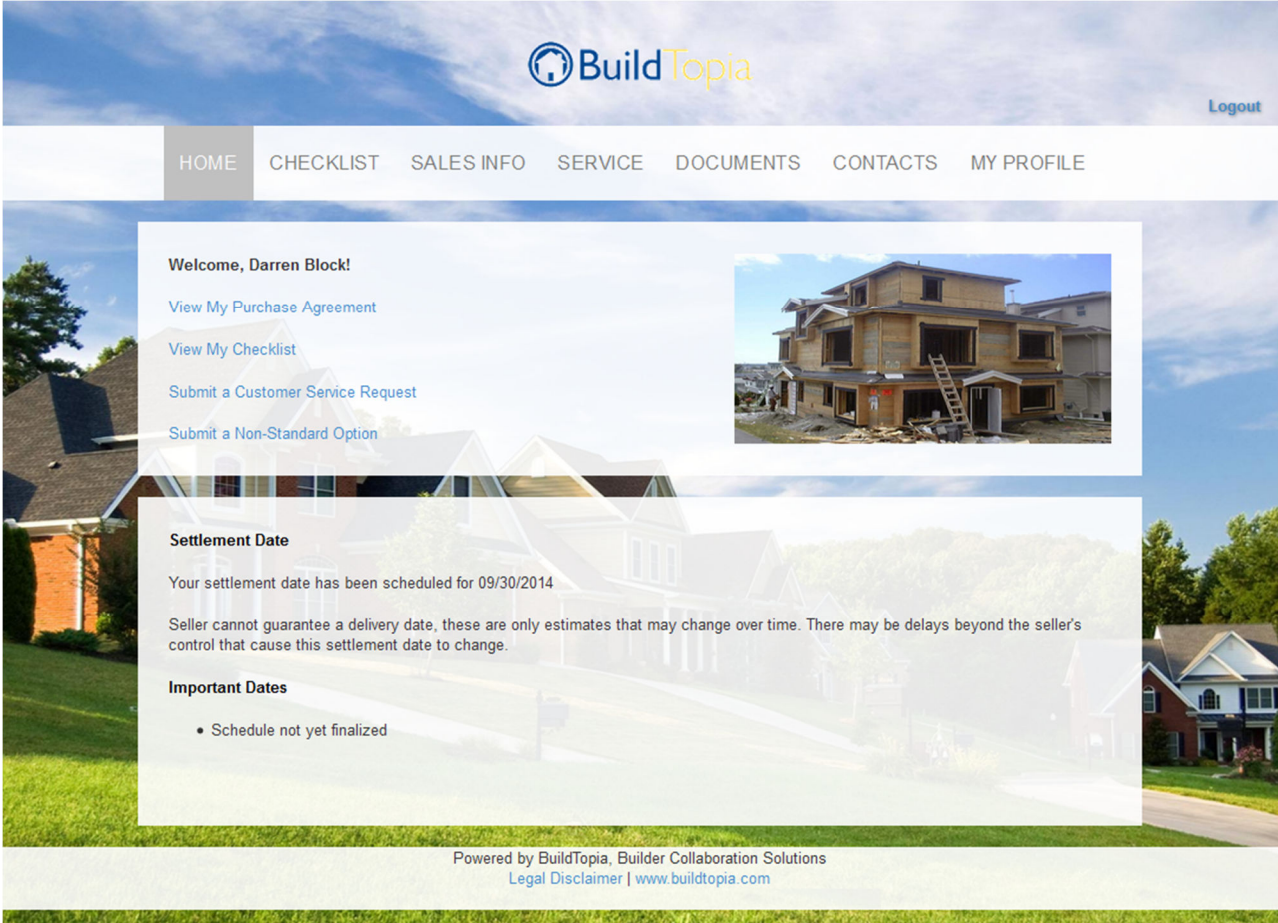
Professional Services

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.

<i>Updated Homebuyer Homepage theme</i>	
Defect #:	001-00-1-16867, 001-00-1-17525
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	<p>This release introduces a modern, updated theme for the Homebuyer Homepage that is optimized for both desktop and mobile browsers.</p> <p>The background image can be changed within the application by going to Admin > BService Setup > Homebuyer Homepage. The 3 choices are:</p> <ul style="list-style-type: none"> • Default image – shown below • Custom image – '.jpg' or '.gif' format, and we recommend 1600x1063 or larger • A solid color – a color picker is shown, or a hex color code value can be typed in. <p>*For best results, we recommend having a company logo with a transparent background that will be displayed at the top of the page. If you would like to update the logo currently shown on your homebuyer homepages please email a new log to our support team.</p>
Screenshots:	<p>Homebuyer Homepage with default background</p> 

Admin > BService Setup > Homebuyer Homepage

Home > Admin > BService Setup Publish Customer Request Form

Projects	Users	Imports	Company Info	Company Setup	BService Setup
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Customer Request Form Setup

Warranty Service Team

Permission Roles
Rep Rotation
General Settings

Homeowner

Custom Fields
Associated People
Homebuyer Homepage
Warranties

Homebuyer Homepage Background

Default Image

Custom Image (.jpg or .gif file, recommended size 1600 X 1063 pixels or larger)

Solid Color

Customer Service Request Form Header

This information will appear at the top of the homebuyer request submission page

Requests will be addressed as soon as possible. And Test

Ability to schedule automated emails of on-demand reports (permission controlled feature)

Defect #:	001-00-1-15875
Ticket #:	001-00-207025
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Admin > Company Setup > Reporting Roles > View/Edit Reports > On-Demand Reports > Run a report > More Actions > Scheduled Email Delivery This feature gives the ability to receive emails of on-demand reports at specified intervals to both BuildTopia users within the account and specified email addresses. <ul style="list-style-type: none"> - Only users with the new permission will be able to use this feature. The Reporting Admin role gets access to the feature by default. - Only the owner of the report will be able to set and edit the schedule. Other users will get a view only page showing the schedule details.

Screenshots:

Admin > Company Setup > Reporting Roles > View/Edit

Home > Admin > Edit Reporting Role

Projects	Users	Imports	Company Info	Company Setup	BService Setup
----------	-------	---------	--------------	----------------------	----------------

Edit Reporting Role

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
1 of Custom Fields

This is a BuildTopia defined permission role
Not Editable

* Required

Role name *

Permissions

Ability to set schedule email delivery of reports

Ability to change report owner

Admin

Bidding and Contracting

Customer Service

People

Project

Purchasing

Sales

Scheduling

Sales Management

Check the permissions that this role should have

Reports > On-Demand Reports > Run a report > More Actions > Scheduled Email Delivery

Home > Reports > Schedule Email Setup

Standard Reports	On Demand Reports
------------------	--------------------------

A1 0001 Draw Test Draw Package - Back To Report

Frequency	Daily - Weekdays (Monday thru Friday)
Format	PDF
Selected Users	John Doe Earl Cat
Additional email addresses	

Ability to change the owner of on-demand reports (permission controlled feature)

Defect #: 001-00-1-17654

Ticket #:

BTBuilder BTSales BTService

Description: Reports > On-Demand Reports > Run a report
 This feature gives the change the owner of on-demand reports.

- Only users with the new permission will be able to use this feature. The Reporting Admin role gets access to the feature by default.
- Users with this permission will see the name of the current owner of the report next to the report name in blue text. If the blue text is clicked a dropdown showing other users with access to that module of data sets will be shown.
- Users without this permissions will see the name of the current owner of the report in black text, and will not be able make any changes.

Screenshots:

Admin > Company Setup > Reporting Roles > View/Edit

Home > Admin > Edit Reporting Role

Projects Users Imports Company Info **Company Setup** BTService Setup

Edit Reporting Role

General * Required

Units of Measure
 Payment Terms
 Variance Codes
 Salutations
 Budget Settings
 Purchasing Settings
 Document Settings
 Document Folders
 Report Settings
 Print Form Settings
 Data Upload Wizard
 1 of Custom Fields

**This is a BuildTopia defined permission role
Not Editable**

Role name * Reporting Administrator

Permissions Check the permissions that this role should have

<input checked="" type="checkbox"/> Ability to set schedule email delivery of reports	<input checked="" type="checkbox"/> Customer Service	<input checked="" type="checkbox"/> Sales
<input checked="" type="checkbox"/> Ability to change report owner	<input checked="" type="checkbox"/> People	<input checked="" type="checkbox"/> Scheduling
<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Project	<input checked="" type="checkbox"/> Sales Management
<input checked="" type="checkbox"/> Bidding and Contracting	<input checked="" type="checkbox"/> Purchasing	

Save Cancel

Reports > On-Demand Reports > Run a report

Home > Reports > Report Results

Standard Reports **On Demand Reports**

POs Approved by Date - POs approved within date range by Hyung Park New Report

Filtered By: Approve Date Greater Than or Equal To 02/01/2007
 AND Approve Date Less Than or Equal To 02/23/2007

Hide Details Save As More Actions

PO Number	PO Total Amount	Approve Date	Status	Trade Partner Name
Project Name: Amber Hills Phase II (12 Records)				
Lot Number: 01-002.A-4 (12 Records)				
AH2-10452	\$5,000.00	02/14/2007	J	BT Woodworks
AH2-10452	\$5,000.00	02/14/2007	J	BT Woodworks
AH2-10452	\$5,000.00	02/14/2007	J	BT Woodworks
AH2-10452	\$5,000.00	02/14/2007	John Brodrick	BT Woodworks
AH2-10452	\$5,000.00	02/14/2007	John Brodrick	BT Woodworks
AH2-10452	\$5,000.00	02/14/2007	John Brodrick	BT Woodworks

Change Report Owner

--Select--

Save Cancel

Ability to generate PDF versions of on-demand reports

Defect #:	001-00-1-10190
Ticket #:	001-00-151552
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Reports > On-Demand Reports > Run a report > More Actions PDF versions of on-demand reports can now be generated.

Screenshots:

The screenshot shows a web application interface for report management. At the top, there are tabs for 'Standard Reports' and 'On Demand Reports'. Below the tabs, the page title is 'Option 051865-40 - details by Amos O'. A filter bar indicates 'Filtered By: Option Code No Equals 051865-40'. On the right, there are buttons for 'Edit', 'Hide Details', 'Save', 'Save As', and a 'PDF' dropdown menu. A table lists various report options with columns for 'Activity Code No + Name' and 'Status'. A 'Preferences' dialog box is open over the table, showing 'Page Layout' options: 'Portrait' (selected) and 'Landscape'. A 'Continue' button is visible in the dialog.

Admin

Addition of the option to select email templates on the Webkit Prospect Form

Defect #:	001-00-1-15715
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Project Settings > Webkit Prospect Form Sales email templates can now be selected for the Auto-Response and Notification emails in the Webkit setup process.

Updates to the Schedule View pages

Defect #:	001-00-1-16885, 001-00-1-17015
Ticket #:	001-00-223541, 001-00-224021
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Review Schedule Data Library > Schedules > View We have added alternate coloring for task rows, and yellow highlighting that moves with the cursor on these pages to make it easier to view and manage the tasks.

Updates to the Manage Message Forwarding page in the 'My Profile' section

Defect #:	001-00-1-15843
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	My Profile > Manage Message Forwarding Usability updates were applied to the manage message forwarding page.

Updates to the Queue pages for BTAccounting/Dynamics integration

Defect #:	001-00-1-17376
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	A new column called 'Parameters' has been added to give more information about the data being sent to Dynamics. Also, a filter has been added for the 'Task' column.

Sales

Updates to the Buyers and SPECS lists

Defect #:	001-00-16567
Ticket #:	001-00-221075
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	The following updates have been made to the different tabs on the Buyers and SPEC lists: Sales > SPECS <ul style="list-style-type: none">• Update of the name of the tab from 'SPEC List' to 'SPECS'• Addition of new columns to the list of current SPECS: Accepted Date, NSOs• Addition of a new tab to show information for terminated SPECS. Sales > Buyers > Terminated tab Sales > SPECS > Terminated tab The following updates have been made to the different tabs on the Buyers and Sales lists in sales based on feedback: <ul style="list-style-type: none">• Addition of new columns: Base Price, Premium, Options, NSOs, Termination Date• Removal of the 'Construction Status' column and the Actions column.

Addition of NSO and documents columns to the workups table on prospects workup page

Defect #:	001-00-1-17005
Ticket #:	001-00-224075
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Prospects > Workups Columns have been added workup list for prospects to show the total of NSOs currently added to the workup, and associated documents.

<i>Updates to the Price Plans page</i>	
Defect #:	001-00-1-17125
Ticket #:	001-00-224435
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Price Plans Columns to shown Plan Number and Square Footage were added to this page.

<i>Updates to the Price Options page</i>	
Defect #:	001-00-1-17514
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Price Options Columns to shown Plan Number and Square Footage were added to this page.

<i>A 'Save and Add Another' button has been added to the survey page after adding a prospect</i>	
Defect #:	001-00-17124
Ticket #:	001-00-223413
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Prospects > Add Prospect > Save & Continue > Survey When manually adding a prospect, if 'Save & Continue' is clicked the survey is shown. We have now added a 'Save and Add Another' button to the survey page in this instance that will make it easier to enter multiple prospects with their survey information.

Project Management

<i>Update to the 'Apply CO to Activity List' process to ensure that change orders are updated in order</i>	
Defect #:	001-00-1-16138
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > CO The 'Apply CO to Activity List' process has been updated to ensure that change orders are updated in chronological order, so long as they approved.

Reports

<i>Addition of a Tasks Purchase Orders section to the Schedule Tasks data set</i>	
Defect #:	001-00-1-12193
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	<p>Reports > On Demand Reports > New Reports > Scheduling > Scheduling Tasks</p> <p>A new section, 'Task Purchase Orders' has been added to this data set with the following fields: Activity Code Name, Activity Code No + Name, Activity Code Number, Activity Package Name, Activity Package No + Name, Activity Package Number, NSO Number, Option Code Name, Option Code No + Name, Option Code Number, PO Number, PO Status, Trade Name, Trade No + Name, Trade Number, Trade Partner.</p>

<i>Addition of activity package information to the NSO on-demand data set</i>	
Defect #:	001-00-1-15918
Ticket #:	001-00-223714
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	<p>Reports > On-Demand > New Report > Purchasing > NSOs > NSO Estimate Information section</p> <p>These fields have been added: Activity Package No, Activity Package Name, Activity Package No + Name.</p>

<i>Addition of a NSO Quotes Information section to the purchasing NSOs data set</i>	
Defect #:	001-00-1-15915
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	<p>Reports > On-Demand > New Report > Purchasing > NSOs</p> <p>A new section, 'Task Purchase Orders' has been added to this data set with the following fields: Trade Partner Name, Trade Partner Quote Status, Expiration Date, , Activity Code No, Activity Code Name, Activity Code No + Name, Activity Package No, Activity Package Name, Activity Package No + Name, Scope of Work, Unit Cost, Quantity, Amount, Tax Rate, Tax Amount, Total Amount.</p>

<i>Addition of the Variance % field to Activity List w/Schedule Information data set</i>	
Defect #:	001-00-1-17144
Ticket #:	001-00-223714
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	<p>Reports > On-Demand Reports > New Reports > Scheduling > Activity List w/Schedule Information</p> <p>A new field has been added to this data set in the 'Activity List Information' section - Variance %. It shows the value of (Projected Variance/Current Budget) x 100.</p>

Customer Service

Addition of 'Edit' and Delete' features for Co-Owners in service

Defect #:	001-00-1-15764
Ticket #:	001-00-221497, 001-00-221699, 001-00-224960
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	CS > Owners > Owner Name > Co-Owner Name 'Edit' and 'Delete' links have been added on the co-owner detail page.

Usability updates the 'Associated People' tab on the owner page

Defect #:	001-00-1-17506
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	CS > Owners > Owner Name > Associate Person & Associated People tab Usability updates have been made to these pages.

General

Updates to the messages displayed when trying to log in with incorrect login information

Defect #:	001-00-1-17344, 001-00-1-17374, 001-00-1-17375
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	We have updated the messages displayed when the email address of password provided for login are incorrect in an effort to make it easier to recover login information.

Updates to the calendar selection tools

Defect #:	001-00-1-16935, 001-00-1-17139
Ticket #:	001-00-224178
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	The calendar selection tools have been updated across the application.

Replacement of 'Select All' & 'Clear All' buttons with multi-select checkboxes

Defect #:	001-00-1-14847
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Select All' and 'Clear All' buttons have been updated with multi-select checkboxes.'

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.

Admin

<i>Issue with the display percentages of draw activity packages on options on project plans</i>	
Defect #:	001-00-1-16193
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Plans > Options > View Admin > Projects > Plans > Options > Edit Status Only Percentages were not displayed for activity packages on option on these pages. This has been corrected.

<i>Issue with the drop downs on the generated WIK form</i>	
Defect #:	001-00-1-17297
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Project Settings > Webkit Prospect Form > Questions When 'drop down' survey questions were included on the WIK form, the generated form did not allow a blank value, which forced the user to have to pick a selection, which was not correct when the question was not required. This has been corrected.

<i>Updates to the preview survey page</i>	
Defect #:	001-00-1-16469
Ticket #:	001-00-219454
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Project > View > Edit Survey > Preview Survey The preview survey page has been updated to include both company and project survey questions.

<i>Update of default status filter value on the schedule template list in the Data Library</i>	
Defect #:	001-00-1-17105
Ticket #:	001-00-220843
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Schedules The default value for the status schedule templates list will now be 'Active.'

Issue with lot custom fields 'Number 3', 'Number 4' & 'Number 5'

Defect #:	001-00-1-17136
Ticket #:	001-00-224474
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Admin > Projects > Lots > Edit When a value was saved on the 'Number 3' lot custom field the same value was saved on the 'Number 4' and Number 5' fields. This issue has been corrected.

Issue with the lot premium field

Defect #:	001-00-1-17044, 001-00-1-16289
Ticket #:	001-00-224253, 001-00-225218
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Admin > Projects > Lots > Edit Sales > Lot Matrix > Edit PM > Lot Matrix > Edit The lot premium field incorrectly gave an error message in some cases. This has been corrected.

Update to the 'Project Type' field for critical dates functionality

Defect #:	001-00-1-17351
Ticket #:	001-00-225799
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Projects > Edit The 'Project Type' field for critical dates that is only shown when a project is in the 'Ontario' project is now a required field to enable the critical dates functionality.

Issue with the permissions that control access to projects for accounting exports

Defect #:	001-00-1-16973
Ticket #:	001-00-223375
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Company Setup > Administrator Roles > View/Edit > 'Access Exports for all Projects' Some users could see all projects on the new export/re-export pages when they did not have this permission. This has been corrected.

Updates to the Messages section

Defect #:	001-00-1-16925, 001-00-1-16972
Ticket #:	001-00-223079
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Home > Messages While searching for messages, the date sort was reset if the project filter was used. This has been corrected. The page layout has also been updated.

Sales

Issue with the 'Prospects View Only' sales permission

Defect #:	001-00-1-16975
Ticket #:	001-00-223706
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Admin > Company Setup > Sales Permissions > View/Edit > View Only permission under the Prospects section Users with this permission could see the To-Do tab. Also, on the prospects tab they could not view any workup details. This has been corrected to ensure that their access to the To-Do tab is controlled by those specific permissions, and that they have access to view prospect workups but not make any changes.

Issue with the options tab on the workup page for workups with lots in another project

Defect #:	001-00-1-17664
Ticket #:	001-00-227064
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Prospects > Workups > Manage Workup When a workup was created with a lot in a different project, the options were not shown on the manage workup page if the plan on the workup was not associated to the project for the prospect. This has been corrected.

Issues with the contacts list shown on the Homebuyer Homepage (HBHP)

Defect #:	001-00-1-17224
Ticket #:	001-00-224991
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Homebuyer Homepage Contacts page When a company contact that was not a BuildTopia user was added to the contact list in the HBHP setup section in Admin > Projects, that contact was not shown on the HBHP. This has been corrected.

Issue with the plan filter on the buyer's list

Defect #:	001-00-1-17007
Ticket #:	001-00-224115
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Buyers In some cases the Plan filter on the buyer's list does not return results even when there are matching values. This has been corrected.

Issue when viewing broker agent details from Sales

Defect #:	001-00-1-17024
Ticket #:	001-00-224083, 001-00-224142
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Broker Agents/Mortgage Cos > Broker Agents tab > Broker Name The broker details shown when the broker name was clicked were inconsistent. This has been corrected.

Issue with the attachment box for prospect emails

Defect #:	001-00-1-17662
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Prospects > Emails > Attachment <ul style="list-style-type: none">The pop-up box for selection of documents was formatted incorrectly, and the dates were shown in an incorrect format. These issues has been corrected.We have also added a filter for the 'Author' column.

Issue with the @@incentives@@ contract template tag

Defect #:	001-00-1-17475
Ticket #:	001-00-226154
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Manage Buyers & SPECS > Agreement > View/Print Contract When the @@incentives@@ tag was used on generated sales contracts unusual characters were shown, or an error message was shown. This has been corrected.

Addition of plan information to the CO with History print form

Defect #:	001-00-1-17294
Ticket #:	001-00-223938
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Buyers > CO > CO with History Plan information has been added to the CO with History print form.

Issues with the printable version of the financials calculations

Defect #:	001-00-1-16968
Ticket #:	001-00-223848
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Prospects/Buyers > Financials > Printer icon When this print form was generated two pages were produced when all the data could fit on one page. This has been corrected.

Issue with the Pricing addendum with taxes print form in Canadian accounts

Defect #:	001-00-1-17025
Ticket #:	001-00-224047, 001-00-224173, 001-00-224975
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Prospects > Workups > Manage Workups > View/Print Pricing Addendum/Agreement Price Log > Pricing Addendum with Taxes The Pricing addendum with Taxes print form was not showing tax information when generated immediately after creating a new workup. This has been corrected.

Bidding & Contracting

Issue when copying pricing for turnkey bids/contracts

Defect #:	001-00-1-16446, 001-00-1-17358
Ticket #:	001-00-00-221493, 001-00-222813
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Bids > Turnkey > View > Copy Pricing BC > Contracts > Turnkey > View > Copy Pricing In some cases the tax was not calculated correctly when using this feature. This has been corrected to ensure that the tax is calculated correctly according to the tax percentage of the project that is receiving the prices. Instructional text has also been added to the page to help avoid confusion.

Issue with documents when creating a revised contract

Defect #:	001-00-1-16686
Ticket #:	001-00-2
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Contracts > View > Create Revision Documents that were associated to the original contract were not carried over to the contract revision. This has been corrected.

Issue with the update of the proforma budget for some option activity package activities

Defect #:	001-00-1-16994
Ticket #:	001-00-222979
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Proforma Budgets > Option In some cases the proforma budget was not updated on activities on draw activity packages on options. This issue has been corrected.

Update to the display of draw package activities on the proforma budgets page

Defect #:	001-00-1-16805
Ticket #:	001-00-221558
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Proforma Budgets > Base When looking at the activities of a draw package on a plan on the proforma budgets page in BC, only one activity is shown because the application divides the entered amount according to the defined percentages. We have added an information icon for these activities. Hovering a cursor over the information icon will display an explanation of this feature.

Issue with external emails with creating a turnkey bid

Defect #:	001-00-1-17484
Ticket #:	001-00-226052
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Bids > Turnkey > Create When creating a turnkey bid, there is a field called 'External Email(s)' for email addresses for Trade Partners who do not have BuildTopia Trade Partner accounts. In some cases these external email addresses were not receiving emails. This has been corrected.

Update to the Unit of measure bid history to sort by activity code

Defect #:	001-00-1-16694
Ticket #:	001-00-222703
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Bids > Unit of Measure > View > History When viewing the history of a unit of measure bid, the activities were not sorted alphabetically which made it difficult to find specific activities. This has been corrected.

Project Management

<i>Issue with the update of current budgets of NSOs when using the update wizard</i>	
Defect #:	001-00-1-16854
Ticket #:	001-00-220038
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Update Wizard > Update Current Budget When the update wizard was used to update the current budgets of NSO activities that had a quantity less than 1, the current budget for those NSO activities was not updated correctly. This has been corrected.

<i>Issue with the handling of related schedule tasks when a purchase order was voided</i>	
Defect #:	001-00-1-16237
Ticket #:	001-00-220254
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	When a purchase order is voided, the application will now check whether it has a related schedule task. If one exists the association will be broken to free the task to be associated to a new purchase order.

<i>Issue with the variance code for purchase orders on the purchase order edit page</i>	
Defect #:	001-00-1-16175, 001-00-1-17234
Ticket #:	001-00-220049
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Purchase Orders > Edit <ul style="list-style-type: none"> Updates were made to this page to ensure that a change that affects the total amount of the Purchase Order has to exist before the variance code can be updated. **Variance codes can still be managed directly from the Variance Log (PM > Variance Log). When editing an existing manual purchase order, the variance code drop down showed no value even though there was a variance code currently saved. This has been corrected.

<i>Confirmation box added when deleting schedule tasks</i>	
Defect #:	001-00-1-16464
Ticket #:	001-00-217027
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Schedules > Schedule Template Name > Delete PM > Lot Matrix > Review Schedule > Delete A confirmation box will be shown when deleting a schedule template task or schedule task.

Update of the 'Add an Activity' link to 'Add Activities/Activity Packages'

Defect #:	001-00-1-17659
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Activity List The 'Add an Activity' link has been changed to 'Add Activities/Activity Packages'.

NSOs

Issues with selection on the NSO estimate add activities & add activity packages pages

Defect #:	001-00-1-17445
Ticket #:	001-00-226047
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	NSO > Estimates > Add Activities NSO > Estimates > Add Activity Packages When adding activities or activity packages to a NSO, if the page counter was used any selections made were lost. This has been corrected.

Issues on the NSO estimate edit page

Defect #:	001-00-1-17435
Ticket #:	001-00-226047
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	NSO > Estimates > Edit <ul style="list-style-type: none">A 'Save' button has been added to allow changes to be saved without being redirected to the estimate view page.If the user tries to leave the page without saving changes a prompt will be shown.

Customer Service

Error message when sorting Service Order notes by the 'Create Date', 'Created By', & 'Visible to TP' columns

Defect #:	001-00-1-16989
Ticket #:	001-00-223948
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	CS > Service Orders > Service Order number > Notes Tab An error message was shown when sorting service order notes by the 'Create Date', 'Created By', & 'Visible to TP' columns. This issue has been corrected.

'Edit' link for CS request items has been moved from the button to the actions list

Defect #:	001-00-1-17625
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	CS > Requests > Request Number > Items > Item Number The 'Edit' link for CS request items has been moved from the button to the actions list.

Issue when adding new owners on new lots in BService only accounts

Defect #:	001-00-1-17535
Ticket #:	001-00-226444, 001-00-227137, 001-00-227333
	<input type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	CS > Owners > Add an Owner > Next In some cases when a new owner is added in a BService Only account using the 'Add an Owner' link the lot number was not created correctly. This has been corrected.

Reports

Updates to the Request with Items data set to improve performance

Defect #:	001-00-1-15974
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Reports > On-Demand Reports > New Reports > Customer Service > Request with Items Updates have been made to this data set to improve the speed at which it returns data.

Issue with the 'Approve User' column on the purchasing data sets

Defect #:	001-00-1-16077
Ticket #:	001-00-220859
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Reports > On-Demand Reports > New Report > Purchasing > Purchase Order Header > Purchase Order Header section 'BuildTopia on Demand' was displayed for POs that had not been approved. Going forward the value will be blank for POs that have not been approved.

Adjustment to sorting of on-demand reports by name

Defect #:	001-00-1-17106
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Reports > On-Demand Reports On-demand reports will now be sorted alphabetically at 2 levels, first report name, then by report description.

General

Correction of search fields on various pages

Defect #:	001-00-1-17196, 001-00-1-17359, 001-00-1-17645, 001-00-1-17646, 001-00-1-17647
Ticket #:	001-00-224851, 001-00-225537, 001-00-226959
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Data Library > Plans > Projects Data Library > Plans > Projects > Lots Data Library > Plans > Projects > Lots > Associate Lots Data Library > Options > Copy Option Code Data Library > Activities > Edit > Save and Flowdown > Next > Next > Next (Plan Option Activities) Issues with the search fields on the pages above have been corrected.

Issue with module navigator on some pages

Defect #:	001-00-1-17195, 001-00-1-16934, 001-00-1-17225, 001-00-1-17788
Ticket #:	001-00-223779, 001-00-224910, 001-00-225179, 001-00-226768, 001-00-227560
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	The module navigator has been updated to address various issues on the following pages: Sales > Prospects > Workups > Select Option Sales > Price Options PM > Lot Matrix, and related pages PM > Lot Matrix > Edit PM > Lot Matrix > CO PM > Lot Matrix > Options PM > Lot Matrix > Purchase Orders > Generate Purchase Orders Sales > Manage Buyers & SPECS Sales > Broker Agent/Mortgage Cos > View Sales > Broker Agent/Mortgage Cos > View > Edit Sales > Broker Agent/Mortgage Cos > Mortgage Companies, and related pages Sales > Broker Agent/Mortgage Cos > Broker Agents and related pages

Trade Partner Accounts

<i>Activities marked as 'Do not Bid' on unit of measure bids are now hidden in TP accounts</i>	
Defect #:	001-00-1-17064
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Trade Partner account > Bids > Unit of Measure > Edit Activities marked as 'Do not Bid' on Unit of Measure bids in the builder's account could be seen, but not updated on the Trade Partner's side which caused confusion. They will now be hidden.

<i>Project Company Name has been added to the purchase order view page in TP accounts</i>	
Defect #:	001-00-1-17104
Ticket #:	001-00-219729
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	TP Account > Purchase Orders > Select a company > Click on a PO # Currently only the project name is shown on the purchase order view page, which may cause confusion when it is different from the project company name. The page has been update to show both the project name and the project company name.

<i>Old message forwarding setting showing on the 'Add Users' page in TP accounts</i>	
Defect #:	001-00-1-17140
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Trade Partner Account > Admin > Users > Add Users The old global message forwarding setting was still showing on the 'Add Users' page in TP accounts. This has been corrected.

Browser related

<i>Issue with sending individual emails to prospects when using Internet Explorer with compatibility mode 'On'</i>	
Defect #:	001-00-1-16524, 001-00-17000
Ticket #:	001-00-222059
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Prospects > Email When using Internet Explorer with compatibility mode 'On' the individual prospect email generated on by this page could not be sent. This has been corrected.

Issue with the display of Campaign names when using Internet Explorer with compatibility mode 'On'

Defect #:	001-00-1-15897
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Admin > Company Setup > Prospect Type Code > Project & Campaign Associations Campaign names were not shown correctly on this page when using Internet Explorer with compatibility mode 'On.' This has been corrected.

Issue when using the browser back button from PM Lot Matrix > Lot View

Defect #:	001-00-1-16826
Ticket #:	001-00-223181
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Lot Matrix > View <ul style="list-style-type: none">The lot view page would not show lot information consistently when the 'Back' button was used. This has been corrected.Use of the 'Back' browser button gave inconsistent results throughout the NSO module. This has been corrected. However, we do not recommend using the 'Back' browser button when working in BuildTopia.

Issues on the 'Buyer Acceptance' tab of the NSO list, and use of the 'Back' browser button

Defect #:	001-00-1-17565, 001-00-1-16275
Ticket #:	001-00-220949, 001-00-221134
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	NSO > NSO List > Buyer Acceptance <ul style="list-style-type: none">The Buyer Acceptance tab would not consistently load correct results. This has been corrected.Use of the 'Back' browser button gave inconsistent results throughout the NSO module. This has been corrected. However, we do not recommend using the 'Back' browser button when working in BuildTopia.

Issue when entering phone numbers for prospects when using an tablet browser

Defect #:	001-00-1-17208
Ticket #:	001-00-224976
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Prospects > Add Prospect Sales > Prospects > Edit Sales > Prospects > Prospect Name > Actions > Add Co-Prospect Sales > Prospects > Prospect Name > Co-Prospects tab > Edit We have made adjustments to the phone number fields to make it easier to enter phone numbers for prospects and co-prospects when adding/editing prospects and co-prospects.

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 6.6.3, Q1 2015

- Completion of updates to sales.
- Updates to detailed permissions for sales.
- Updates to the Update Wizard in project management.
- Updates to bid/contract comparison tools in bidding & contracting.