



Version 6.7.1 Release Notes

August 12th 2015

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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>

Customer Care Center

The Customer Care Center assists with software operations.

Telephone: 1 800 411-2020 Option #4
Email: support@buildtopia.com
Hours: Monday through Friday 8:30 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.

Admin

Ability to update the status of multiple options on a plan, and flow down updates to project plans

Defect #:	001-00-1-17516
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Plans > Options > Update Status of Multiple Options This feature allows the status of multiple options on a plan to be updated, and for those changes to be flowed down to that plan in different projects.
Screenshots:	

Data Library > Plans > Options > Update Status of Multiple Options

Home > Data Library > Plans > Plan Option Codes

Plans	Activities	Options	Template Budgets	Schedules
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Plan Option Codes Add Option Code **Update Status of Multiple Options** Back

Plan #: GD01 Plan Name: Vineyard Sq. Ft./Bed/Bath: 2350/3.0/2.5

Delete Selected Option Codes Delete Selected & Delete From Additional Plans

Option Codes Search: Category: All Status: All

Option Code	Description	Category	Status	Actions
<input type="checkbox"/> APP.030.005 Appliance Package - Level 1 White		305 Appliances	Available	0 Edit
<input type="checkbox"/> APP.030.010 Appliance Package - Level 2 Black		305 Appliances	Available	0 Edit
<input type="checkbox"/> APP.030.015 Appliance Package - Level 3 Stainless		305 Appliances	Available	0 Edit
<input type="checkbox"/> APP.030.020 Appliance Package - Level 4 Brushed Chrome		305 Appliances	Available	0 Edit

Home > Data Library > Plans > Update Status of Multiple Options

Plans	Activities	Options	Template Budgets	Schedules
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Update Status of Multiple Options Back

Plan #: GD01 Plan Name: Vineyard Sq. Ft./Bed/Bath: 2350/3.0/2.5

Option Codes Search: Category: All Status: All

Option Code	Description	Category	Status	Available	Unavailable	Standard	Lot Dependent	Pricing
<input type="checkbox"/> APP.030.005 Appliance Package - Level 1 White		305 Appliances	Available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> APP.030.010 Appliance Package - Level 2 Black		305 Appliances	Available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> APP.030.015 Appliance Package - Level 3 Stainless		305 Appliances	Available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> APP.030.020 Appliance Package - Level 4 Brushed Chrome		305 Appliances	Available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> BAS.001.005 Lower Level Club Room	NEW DESCRIPTION TO FOLLOW	130 Basement/Lower Level Finish	Lot Dependent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> BAS.001.010 Lower Level Club Room & Bath	8/0-Foundation	130 Basement/Lower Level Finish	Lot Dependent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> BAS.001.015 Club Room & Powder Room	8/0-Foundation	130 Basement/Lower Level Finish	Lot Dependent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> BAS.001.020 Lower Level Club Room & Bath	9/0-Foundation	130 Basement/Lower Level Finish	Lot Dependent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> BAS.001.025 Club Room & Powder Room	9/0-Foundation	130 Basement/Lower Level Finish	Lot Dependent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> CAB.030.005 Kitchen Cabinets - Level 1		310 Cabinets - Kitchen	Standard	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> CAB.030.010 Kitchen Cabinets - Level 2		310 Cabinets - Kitchen	Available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 1 of 36
540 Option Codes listed.

15 Option Codes per page

Save **Save and Update Project Plans** Cancel

Update Plans at Project Level

Back

Plan #: GD01 Plan Name: Vineyard Sq. Ft./Bed/Bath: 2350/3.0/2.5

Option status updated successfully.

Select the plan(s) to be updated with the current plan option status at the project level.

Update Selected Exit

Project Plans

Search: Project: All Plan Status: All

<input checked="" type="checkbox"/>	Project	Plan	Description	Plan Status	Option Status
<input checked="" type="checkbox"/>	Parkview Gardens (Single Family)	GD01 Vineyard		Active	Available
<input checked="" type="checkbox"/>	Getten Downes	GD01 Vineyard		Active	Available

2 Project Plans listed. 50 Project Plans per page

Ability to flow down project plan status to lots

Defect #:	001-00-1-17126
Ticket #:	001-00-222786
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Admin > Projects > Plans > Edit When a plan status is updated at the project level, it can now be flowed down to selected lots by clicking the 'Save and Update Lots' button.

Screenshots:

Admin > Projects > Plans > Edit

Home > Admin > Edit Plan

Projects Users Imports Company Info Company Setup BTService Setup

Edit Plan

Plan Information * requires

Plan #: *	GD01	Square Footage:	2350
Plan Name: *	Vineyard	# of Bedrooms:	3.0
Plan Description:		# of Bathrooms:	2.5
Status:	Active	Retail Price:	\$325,000.00
		Default Schedule Template:	-- None --

Save **Save & Update Lots** Cancel

Home > Admin > Edit Plan

Projects Update Lots BTService Setup

Edit Plan

Plan Information * requires

Plan #: *	GD01
Plan Name: *	Vineyard
Plan Description:	
Status:	Active

Lot Number	Lot Address	Lot Status	Lot Sales Status	<input checked="" type="checkbox"/>
A101		Pending	Sold	<input checked="" type="checkbox"/>
A102		Pending	Sold	<input checked="" type="checkbox"/>
A103		Pending	Released for Sale and SPEC	<input checked="" type="checkbox"/>
A104		Pending	Released for Sale and SPEC	<input checked="" type="checkbox"/>
A105		Pending	Released for Sale and SPEC	<input checked="" type="checkbox"/>
A106		Pending	Released for Sale	<input checked="" type="checkbox"/>
A107		Pending	Not Released	<input checked="" type="checkbox"/>
A108		Pending	Not Released	<input checked="" type="checkbox"/>
A109		Pending	Released for SPEC	<input checked="" type="checkbox"/>

Save Save & Update Lots Cancel

Sales

Additional options for rounding when updating option prices

Defect #:	001-00-1-18857
Ticket #:	001-00-226982
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	<p>Sales > Price Options > Edit Option Prices > Select an option category</p> <p>The tool that allows option prices to be updated by a defined margin or markup has been updated to allow the calculated prices to be rounded in 2 different ways:</p> <p>'Round Up' - new default option – the calculated values will always be rounded up to the nearest chosen value (\$0.01, \$0.10, \$1 (default), \$10, \$100).</p> <p>'Round' – the existing functionality, where the calculated values are rounded either up or down depending on whether the point is below or above '5' depending on the chosen value (\$0.01, \$0.10, \$1 (default), \$10, \$100).</p>

Screenshots:

Sales > Price Options > Edit Option Prices > Select an option category

Home > Dunnington Village (High Density Condo) > Sales > Price Options > Price Options

To Do	Prospects	Buyers	SPECs	Broker Agent/Mortgage Cos	Lot Matrix	Price Plans	Price Options	Follow-Up
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Price Options for Plan: M28 Hillside

Category: 130 Basement/Lower Level Finish

Flag Options with Incomplete Cost Information: Options that have incomplete cost information will be denoted with a ▼. Note that this may slow down the loading of the page.

Update Option Pricing: Calculate Retail Price on a Margin of % **Round Up** to the nearest \$1

Options

Option Category	Option Code ▲	Option Description	Status	Cost	Current Retail Price	New Retail Price	
130 Basement/Lower Level Finish	BAS.001.005 Lower Level Club Room	NEW DESCRIPTION TO FOLLOW	Standard	\$0.00	\$1,400.00	\$1,400.00	<input type="checkbox"/>
130 Basement/Lower Level Finish	BAS.001.010 Lower Level Club Room & Bath	8/0-Foundation	Standard	\$0.00	\$1,250.00	\$1,250.00	<input type="checkbox"/>
130 Basement/Lower Level Finish	BAS.001.015 Club Room & Powder Room	8/0-Foundation	Standard	\$0.00	\$1,350.00	\$1,350.00	<input type="checkbox"/>

3 Options listed. 50 Options per page

Mandatory email preferences link added as a footer to all emails sent from Canadian accounts

Defect #:	001-00-1-16986
Ticket #:	001-00-223004
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	<p>After this release, all emails sent from BuildTopia accounts for Canadian companies will have a link at the bottom of the email with this text: 'Click here to update your email subscription preferences'. When the link is clicked a page will be shown to the email recipient that will allow them to update their email opt-out setting in BuildTopia.</p> <p>This feature has been added as a result of updated Canadian regulations on commercial email communications</p>

Screenshots:

Emailed received by prospect/buyer:

Dear Jack,

In the award-winning Customer Support Design Center located in our model at Stone Creek, we offer showrooms where with the help of our design consultants you can explore all the possibilities to enhance your home with a wide selection of pre-priced features and finishes. From trim packages and countertops to carpet and flooring...from lighting and audio systems to kitchen cabinets and appliances...from doorknobs and stair rails to windows and doors and everything in between, the selection is enormous.

And don't forget: By personalizing your home while it's being built, you can finance all of your options and upgrades as part of your mortgage.

The Customer Support Design Center is just one of the many ways we're working to make your new dream home come true.

Please take a minute to contact me for an appointment to visit our Design Center this week.

Sincerely,

Jack Dill

[Click here to update your email subscription preferences.](#)

When link is clicked a new browser tab is opened:

Dunnington Village (High Density Condo)

Please update your preference below:

New permission for deletion of deposits from finalized, settled, terminated

Defect #:	001-00-1-20000
Ticket #:	001-00-236362
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Admin > Company Setup > Sales Roles > View/Edit A new sales permission has been added to allow the deletion of deposits from finalized, settled, and terminated agreements.

New sales notification messages when lots are pulled/released from Sale, SPEC, Production

Defect #:	001-00-1-15815, 001-00-1-17407, 001-00-1-19143, 001-00-1-20410
Ticket #:	001-00-225443
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Admin > Permissions > Sales Roles > View/Edit > Messages section New notification messages have been added to the following actions: <ul style="list-style-type: none"> • Lots released for Sale • Lots released for SPEC • Lots pulled from Sale • Lots pulled from SPEC • Lots released to Production • Lots pulled from Production.

Bidding and Contracting

Ability to update Unit of Measure bids by a fixed amount/percentage

Defect #:	001-00-1-19796
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	BC > Bids > Unit of Measure > View > Update by Fixed Amount/Percentage This feature allows activities on a unit of measure bid to be increased or decreased by a specified fixed amount or percentage.
Screenshots:	<p>BC > Bids > Unit of Measure > View > Update by Fixed Amount/Percentage</p>

Project Management

Option to use primary contracted costs when re-assigning a purchase order

Defect #:	001-00-1-15923
Ticket #:	001-00-219874
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	PM > Purchase Orders > search for an open purchase order > Reassign A new option has been added to the process for re-assigning purchase orders from one Trade Partner to another. When 'Use primary contracted costs' is selected, the process will apply the costs from primary finalized contracts, so long as the contracts exist and are finalized. When the new purchase order is shown the activities that were successfully updated with primary contracted costs will be highlighted in blue.
Screenshots:	

PM > Purchase Orders > search for an open purchase order > Reassign

Home > Getten Downes > Project Management > Purchase Orders > Reassign Purchase Order

Lot Matrix	Purchase Orders	Trade Partners
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Reassign Purchase Order

Lot: A101
 Plan: M28 Hillside
 PO #: GD1001
 TP: HMS Contracting, LLC

Schedule Template:
 Sales Status: Sold
 Type: System
 Status: Open

Original Start Date:
 Projected Finish Date:
 Created By: Amos Odenyo on 07/26/2015
 Modified By: Amos Odenyo on 07/26/2015

Select a pricing option and then select the trade partner in which you want to assign the new PO.

Keep current pricing.
 Manually update pricing after reassignment.
 Use primary contracted costs.

Cancel

Project Participants All Trade Partners

Search: State: All

Trade Partner	City	State	Zip	Phone Number
A & C Masonry, LLC	Bridgewater	VA	22812	
ABC Construction Services	BuildTopia	VA	20854	

Edit Purchase Order

Lot: A101
 Plan: M28 Hillside
 PO #: GD1002
 TP: ABC Construction Services

Schedule Template:
 Sales Status: Sold
 Type: System
 Status: Open

Original Start Date:
 Projected Finish Date:
 Created By: Amos Odenyo on 07/26/2015
 Modified By: Amos Odenyo on 07/26/2015

Line Items highlighted in blue are using primary contracted costs.

PO Successfully Reassigned, New PO# GD1002

Schedule Task		Amount	\$25,684.00
Related PO	Reassignment of GD1001	Tax Amount	\$0.00
Reference Code	<input type="text"/>	Total Amount	\$25,684.00
Comments	<input type="text"/>	Comments for Change Log	<input type="text"/>

Line Items

Activity Code	Activity Package	Option/NSO	Trade	Quantity	Amount	Tax Rate	Total
2110 Dig & Pour footing			210 Concrete - Foundation	1.0(TK)	\$3,876.00	0.0%	\$3,876.00
Scope of Work			Variance Code				
			-- Select Variance Code --				
Option Description/Quoted Description			Selection Notes				
2110 Draw 1 Dig & Pour footing Rough-in			210 Concrete - Foundation	1.0(TK)	\$1,876.00	0.0%	\$1,876.00
Scope of Work			Variance Code				
			-- Select Variance Code --				
Option Description/Quoted Description			Selection Notes				
2110 Draw 2 Dig & Pour footing Finish			210 Concrete - Foundation	1.0(TK)	\$1,876.00	0.0%	\$1,876.00

Reports

New standard report – Backlog Report

Defect #:	001-00-1-19081
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Reports > Standard Reports > Project > Backlog Report The new standard report called 'Backlog Report' shows details on the status of lots in production in a project. It is designed to be run in CSV format.

Labels shown for lot custom fields on on-demand reports

Defect #:	001-00-1-19577
Ticket #:	001-00-229410
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Reports > On-Demand Reports > New Report > Admin > Lot Information > Lot Custom Fields If lot custom fields are defined (Admin > Company Setup > Lot Custom Fields), those defined field labels will now be shown on the on-demand report data set, and on-demand reports.

Two new fields added to the Purchasing > NSO on-demand reports dataset

Defect #:	001-00-1-20415
Ticket #:	001-00-228544
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Reports > On-Demand Reports > New Report > Purchasing > NSOs Two new fields added to the Purchasing > NSO on-demand reports dataset: Total Budget: Shows the calculated total of all the budget figures from the activities on an estimate (Same as the Total Budget field on the Manage NSO page). Total Estimate: Shows the calculated total of all the cost figures from the activities on an estimate (Same as the Total Estimate field on the Manage NSO page).

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>Update to the error checking for the Predecessor field for Schedule Template upload</i>	
Defect #:	001-00-1-20202
Ticket #:	001-00-236847
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Company Setup > Data Upload Wizard > Schedule Templates The error checking for the Predecessor field when uploading schedule templates has been updated to show the location on the spreadsheet where the error is, and details of the error found.

<i>Update to the error checking for the Allowed Variance field for Activities Template upload</i>	
Defect #:	001-00-1-20279
Ticket #:	001-00-237328
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Admin > Company Setup > Data Upload Wizard > Activity Codes The error checking for the Allowed Variance column when uploading activities has been updated to show the location on the spreadsheet where the error is, and details of the error found.

Sales

<i>Issue when trying to finalize agreements</i>	
Defect #:	001-00-1-19525
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Buyers > Finalize Sales > Buyers > Agreement > Actions > Finalize Agreement In some cases an error message was shown when trying to finalize agreements. This has been corrected.

<i>Issue with lot sales status after an agreement on a lot in production is terminated</i>	
Defect #:	001-00-1-20448
Ticket #:	001-00-237760
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Buyers > Agreement > Actions > Terminate Agreement In some cases, when an agreement on a lot in production was terminated, the lot sales status was not correctly updated. This has been corrected.

<i>Issue with SPEC Accepted date for SPEC agreements created from terminated buyer agreements</i>	
Defect #:	001-00-1-20375
Ticket #:	001-00-236362
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Buyers > Agreement > Actions > Terminate Agreement In some cases, when a lot in production Buyers agreement was terminated and a spec was created, the SPEC accepted date was not populated. This has been corrected.

<i>Issue with comments captured when a buyer's agreement was accepted</i>	
Defect #:	001-00-1-20376
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Sales > Buyers > Agreement > Actions > Accept Agreement The comments captured when an agreement is accepted were duplicated on the Comments history tab after the agreement was accepted. This has been corrected.

Bidding and Contracting

<i>Updates to the 'Update by Fixed Amount/Percentage' feature for turnkey bids and contracts</i>	
Defect #:	001-00-1-20231, 001-00-1-20384
Ticket #:	001-00-237612, 001-00-237822
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	BC > Bids > Turnkey > View > Update by Fixed Amount/Percentage BC > Contracts > Turnkey > View > Update by Fixed Amount/Percentage The following updates have been made to the 'Update by Fixed Amount/Percentage' feature for turnkey bids and contracts: <ul style="list-style-type: none"> • When 'Percentage' is chosen, the default for rounding will now be \$0.01. • The feature did not work for activity packages, this has been corrected. • The feature did not work correctly when negative percentages were entered, this has been corrected.

Documents

<i>Issue with email addresses when using the html editor to compose html emails</i>	
Defect #:	001-00-1-19958
Ticket #:	001-00-235368
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	Documents > Compose Email Template When email addresses are added using the HTML editor the link would not work. This has been corrected.

Trade Partners

<i>Issue preventing the day schedule from being loaded when schedule includes many lots</i>	
Defect #:	001-00-1-20200
Ticket #:	001-00-235447
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	Schedules > Day Schedule In some cases the Day Schedule page would take a long time to load, or not load at all when the day schedule included more than 100 tasks. This has been corrected.

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2015. 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 Care Center.

Version 6.7.1.1, Q3 2015

- Bug fixes.
- General usability updates.

Version 6.7.2, Q4 2015

- Updates in Bidding and Contracting – 1st phase.
- DocuSign integration
- General usability updates.