



## **Version 6.7.2 Release Notes**

**November 11<sup>th</sup> 2015**

# Table of Contents

Product and Company Information.....	3
Trademark and Patent Information .....	3
Disclaimer of Warranties and Limitation of Liabilities .....	3
Contacting Support and Services .....	4
Professional Services .....	4
Enhancements .....	5
Defect Fixes.....	10
BuildTopia Product Roadmap.....	19

## **Product and Company Information**

The information in this document is confidential proprietary information belonging solely to Constellation HomeBuilder Systems, Inc., a wholly owned subsidiary of Constellation Software, Inc. This document is supplied under a license and may not be reproduced, published, or disclosed without prior written authorization. Constellation licenses its program products (software) to the customer in accordance with the terms and conditions of the BuildTopia Software License Agreement. No title or ownership of the BuildTopia software is transferred. Any use of the software beyond the terms of the aforesaid license, without the prior written authorization of Constellation, is prohibited.

The names of companies, products, people, characters and/or data mentioned in screens, reports, and other data examples are fictitious and are in no way intended to represent any real individual, company, product or event, unless otherwise noted. Any rights not expressly granted herein are reserved.

## **Trademark and Patent Information**

Other product and company names mentioned herein might be the trademarks of their respective owners.

## **Disclaimer of Warranties and Limitation of Liabilities**

The staff at Constellation has taken due care in preparing this information; however, nothing contained herein modifies or alters in any way the standard terms and conditions of the BuildTopia License Agreement by which the product was acquired. Nor does it increase in any way Constellation's liability to the customer. In no event shall Constellation or its affiliates be liable for incidental or consequential damages in connection with or arising from the use of the product, the accompanying documentation, or any related materials.

## 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

Customer Care assists with software operations.

Telephone: 1 800 411-2020  
Email: [support@buildtopia.com](mailto: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.

## Sales

### Update to the options list on workups and agreements, options grouped by option category

<b>Defect #:</b>	001-00-1-20471
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	<p>Sales &gt; Prospects &gt; Workups &gt; Manage Workup          Sales &gt; Buyers &gt; Agreement (all tabs)          Sales &gt; SPECS &gt; SPEC Accepted          Project Management &gt; Lot Matrix &gt; Options</p> <p>The options section of workup and agreement pages in Sales, and the options list in Project Management has been updated to list options by option category. Within each category the options are sorted by option number.</p>

### Screenshots:

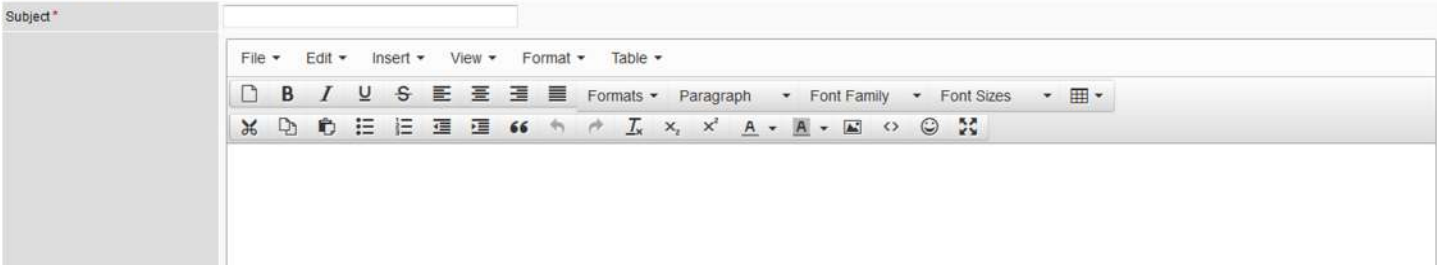
Sales > Prospects > Workups

Options							KEY: != Mandatory, X = Unavailable, S = Option from SPEC, Bold = Standard Option
Option	Description	Qty.	Retail Price	Total Price	Internal Comments	Selection Notes: Attributes	
<b>200 Fireplaces</b>							
FIR.003.005 Family Room Fireplace-Community Standard	Heat-N-Glo SL-950 Direct Vent Gas Fireplace	1	\$0.00	\$0.00		Standard Option	0
<b>215 Plumbing Fixtures - Kitchen</b>							
PLU.030.205 Kitchen Sink - Level 1	Kitchen Sink - Level 1 (standard)	1	\$0.00	\$0.00	Indicate finish in selection notes	Standard Option	1
PLU.030.305 Kitchen Faucet - Level 1	Kitchen Faucet - Level 1 (standard)	1	\$0.00	\$0.00	Indicate finish in selection notes	Standard Option	1
<b>220 Plumbing Fixtures - Bathroom</b>							
PLU.210.005 Master Bath - Sink - Level 1	Master Bath - Sink - Level 1 (standard)	1	\$0.00	\$0.00	Indicate color in selection notes	Standard Option	0
PLU.210.020 Master Bath - Faucet - Level 1	Master Bath - Faucet - Level 1 (standard)	1	\$0.00	\$0.00	Indicate finish in selection notes	Standard Option	0
PLU.210.035 Master Bath - Tub - Level 1	Master Bath - Tub - Level 1 (standard)	1	\$0.00	\$0.00	Indicate color in selection notes	Standard Option	0
PLU.210.050 Master Bath - Shower - Level 1	Master Bath - Shower - Level 1 (standard)	1	\$0.00	\$0.00	Indicate color in selection notes	Standard Option	0
PLU.210.080 Maeter Bath - Toilet - Level 1	Master Bath - Toilet - Level 1 (standard)	1	\$0.00	\$0.00	Indicate color in selection notes	Standard Option	0
PLU.220.005 Bath 1 - Sink - Level 1	Bath 1 - Sink - Level 1 (standard)	1	\$0.00	\$0.00		Standard Option	0
PLU.220.105 Bath 1 - Faucet - Level 1	Bath 1 - Faucet - Level 1 (standard)	1	\$0.00	\$0.00		Standard Option	0
<b>305 Appliances</b>							
APP.030.015 Appliance Package - Level 3 Stainless		1	\$2,800.00	\$2,800.00	BTDemo Note: Utilizes unit of measure activities		1
<b>310 Cabinets - Kitchen</b>							
CAB.030.005 Kitchen Cabinets - Level 1		1	\$0.00	\$0.00	Indicate finish in selection notes	Standard Option	1
CAB.030.045 Island Cabinet - Level 1	Island Cabinet - Level 1 (standard)	1	\$0.00	\$0.00	Indicate finish in selection notes	Standard Option	0

<i>Two new standard print forms: Pricing Addendum by Category and by Category &amp; CO I by Category</i>	
<b>Defect #:</b>	001-00-1-20472, 001-00-1-21243
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Sales > Buyers > Agreement > Pricing Addendum by Category Sales > Buyers > CO > Printer Icon > CO I by Category The two new print forms above have been added, and they show options organized by option category.

<i>Update to prevent addition of tasks if the prospect/buyer has opted out of that task type</i>	
<b>Defect #:</b>	001-00-1-20685
<b>Ticket #:</b>	001-00-237813
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Sales > Prospects > Prospect Name > Actions > Add Task Sales > Buyers > Buyer Name > Actions > Add Task When adding an individual task to a prospect/buyer, task types that the prospect/buyer have opted out from will be hidden from the task type options, e.g. if a prospect has opted out of phone calls the 'Phone Call' task type will not be available.

## Documents

<i>Updated, easier to use HTML editor for emails</i>	
<b>Defect #:</b>	001-00-1-20659
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
<b>Description:</b>	Documents > Compose Email Template Documents > Profile (for an email document) > Edit The html editor has been updated, and is now easier to use. New features include ability easily add online pictures and advanced text tools.
<b>Screenshots:</b>	<p>Documents &gt; Compose Email Template</p> <p><b>Email Body</b></p> 

## Reports

### *Update to the Standard Traffic report to include all Projects*

<b>Defect #:</b>	001-00-1-21610
<b>Ticket #:</b>	001-00-230532, 001-00-232441
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Reports > Standard Reports > Sales Management > Traffic Report The standard Traffic Report has been updated to have the option to run for all projects.

### *Update to Job Cost Reports to exclude activities with 0 as the quantity*

<b>Defect #:</b>	001-00-1-20853
<b>Ticket #:</b>	001-00-231506
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Reports > Standard Reports > Job Cost Report (Lot Detail - Activity) Reports > Standard Reports > Job Cost Report (Lot Detail - Profit) Reports > Standard Reports > Job Cost Report (Lot Summary - Profit) Reports > Standard Reports > Job Cost Report (Lot Summary) Reports > Standard Reports > Job Cost Summary - Management The Job Cost Reports have been updated to exclude activities that have 0 as the quantity. Since these activities have a quantity of 0, their budgets, committed costs etc. are all 0, but their inclusion on the detail versions of the Job Cost reports caused confusion. The reports have been updated to avoid this confusion.

### *Update activity list datasets to exclude activities marked 'Never Generate'*

<b>Defect #:</b>	001-00-1-20682
<b>Ticket #:</b>	001-00-223036
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Reports > On-Demand Reports > Purchasing > Activity List Reports > On-Demand Reports > Purchasing > Activity List w/Schedule Information The two data sets above have been updated to exclude activities that are marked as 'Never Generate'. This has been done to give an accurate comparison of budgets to committed costs by excluding the budgets of activities marked as 'Never Generate'.

**Addition of last modified task date/user to schedule tasks/phases data sets**

<b>Defect #:</b>	001-00-1-20411
<b>Ticket #:</b>	001-00-230532, 001-00-232441
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Reports > On Demand Reports > New Report > Scheduling > Scheduling Tasks Reports > On Demand Reports > New Report > Scheduling > Scheduling Phases Two new fields have been added to the 'Schedule Phase' section of these data sets: 'Last Modified Date' and 'Last Modified User' which show the last time a phase was updated and the name of the user that made the change.

**Messages**

**Automated deletion of unarchived messages from the Messages Inbox**

<b>Defect #:</b>	001-00-1-15735
<b>Ticket #:</b>	001-00-218647, 001-00-232660
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	My Profile Trade Partner Account > My Profile With release 6.7.1 we added settings in the 'My Profile' section that allowed users to choose how long unarchived messages will be retained in the Messages inbox. With release 6.7.2, the automated deletion of messages according to those settings will begin.



## General

<i>General usability updates</i>	
<b>Defect #:</b>	001-00-1-20079, 001-00-1-20278, 001-00-1-20791, 001-00-1-21078, 001-00-1-21168, 001-00-1-21190, 001-00-1-21585, 001-00-1-21618, 001-00-1-21655, 001-00-1-21677, 001-00-1-21721, 001-00-1-21722, 001-00-1-21723
<b>Ticket #:</b>	001-00-240007, 001-00-240283
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	<p>The following updates have been made as part of the overall effort to make the application easier to use:</p> <ul style="list-style-type: none"> <li>• Sales &gt; Price Plans: A new button, 'Save &amp; Update Lots', has been added to allow the new price to be applied on selected lots.</li> <li>• Sales &gt; Price Plans: Plan Name column was showing the plan number and plan name. It has been corrected to show the plan name only.</li> <li>• Sales &gt; Buyers: the 'Settlement Date' link has been updated to 'Settlement Date/View Schedule' since the schedule is visible on the settlement date page.</li> <li>• Sales &gt; Buyers &gt; Agreement &gt; Deposits tab: The Payment Type and Deposit Detail fields have been added to the deposits tab.</li> <li>• Sales &gt; Buyers &gt; Agreement &gt; Actions &gt; Create a Change Order &amp; Sales &gt; Buyers &gt; CO &gt; Edit: The 'Deposit Notes' field has been added to the deposits section.</li> <li>• Sales &gt; Lot Matrix &gt; View &gt; Workups tab: The buyer's name on the workups tab has been updated to be a link to go directly to that workup.</li> <li>• Sales &gt; Price Options &gt; Edit Option Price &gt; select a category: The text for the option cost flag has been updated to explain that the flag identifies options that have costs coming from proforma budgets because primary finalized costs do not exist.</li> <li>• All workup/agreement pages: The NSO section on the workup and agreement pages has been updated to provide more space to the description field. The NSO section has also been updated to give more space to the NSO description field.</li> <li>• The 'Username' field for the homebuyer homepage has been increased to 100 characters.</li> <li>• Documents &gt; Search &gt; Profile &gt; Actions box &gt; Visibility Wizard: re-organization of the tabs to make them easier to navigate, replacement of the select all/clear all buttons with a select all/clear all checkbox.</li> <li>• Admin &gt; Projects &gt; Lots: The 'Selected Plan' column has been added to show the plan under construction for each lot.</li> <li>• Admin &gt; Company Setup &gt; Budget Settings: The text for the budget settings have been updated to explain that the budget is captured when the activity list is created.</li> <li>• CS &gt; Requests &gt; Request Number &gt; Notes tab: The notes tab for requests has been updated to improve the way detail is shown.</li> <li>• Trade Partner Account &gt; Lots &gt; Select Builder, Select Project &gt; Active &amp; Complete tabs: The 'Selected Plan' column has been added to show the plan under construction for each lot.</li> </ul>

## 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.

### Sales

<i>Issue with project for incentives for workups</i>	
<b>Defect #:</b>	001-00-1-20796
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Sales > Prospects > Workups > Manage Workups > Actions > Add an Incentive If a workup is created for a prospect in a different project from the one where the prospect is registered, the incentives shown were for the prospect's project instead of the workup's project. This has been corrected so that the incentives shown are always from the same project as the workup.

<i>Issue with the 'Create/Edit Change Orders' sales permission</i>	
<b>Defect #:</b>	001-00-1-20790
<b>Ticket #:</b>	001-00-238919
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Admin > Company Setup > Sales Roles > View/Edit Sales > Buyers > Agreement > Actions > Create a Change Order Users with a sales role that includes the 'Create/Edit Change Orders' sales permission, but no other buyer permissions could not see the Actions drop down on the agreement pages, and therefore could not see the 'Create a Change Order' link. This has been corrected.

<i>Issue on the price options screen when cost information flag is used</i>	
<b>Defect #:</b>	001-00-1-20385
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Sales > Price Options > Edit Option Prices > Choose an option category When the flag that shows options with incomplete cost information was checked, the numbers on the cost column would not be shown. This has been corrected.

### *Issue with the Deposit Type field for Deposits*

<b>Defect #:</b>	001-00-1-21570
<b>Ticket #:</b>	001-00-241420
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Sales > Agreement > Actions > Add a Deposit Sales > Agreement > Deposits tab > Edit In some cases the deposit type selection was not saved when adding or editing a deposit on an agreement. This has been corrected.

### *Issue with the sales rep drop down in the Advanced Search for prospects*

<b>Defect #:</b>	001-00-1-20855
<b>Ticket #:</b>	001-00-235263
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Sales > Prospects > Advanced Search Users who had a sales role that includes 'View Prospects and Tasks assigned to the User Only' permission were able to see other sales reps in the Advanced drop down. This has been corrected.

### *Issue with the Homebuyer Homepage when an agreement is finalized*

<b>Defect #:</b>	001-00-1-20592, 001-00-1-20797
<b>Ticket #:</b>	001-00-238070, 001-00-238363, 001-00-238815
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Sales > Buyers > Finalize In some cases the status of the homebuyer homepage was not changed to 'Active' when an agreement was finalized. This has been corrected.

### *Issue causing duplicated document counts for SPECS*

<b>Defect #:</b>	001-00-1-18962, 001-00-1-20459
<b>Ticket #:</b>	001-00-232289
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Sales > SPECS In some cases the number of documents associated to SPECS was double the actual number. Additionally, an error message was shown after the 'Back' link on the documents list was clicked. This issue has been corrected.

## Project Management

<i>Issue with activities from NSOs that are released before lot is in production</i>	
<b>Defect #:</b>	001-00-1-21213
<b>Ticket #:</b>	001-00-240232
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	NSO > Lot Matrix > NSO(s) for a lot > Manage > Release In some cases, when a NSO was processed all the way to the 'Released' step before the lot was released to production, the quantities for the activities on the NSO estimate were not carried over to the activity list. This has been corrected.

<i>Issue with current budgets for activities when using Review Missing Activities feature</i>	
<b>Defect #:</b>	001-00-1-21059
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Home > PM > Lot Matrix > Update Wizard > Review Missing Activities > Base tab Home > PM > Lot Matrix > Update Wizard > Review Missing Activities > Option tab In some cases the current budget figure was not added when activities were added using the Review Missing Activities feature. This has been corrected.

<i>Issue with Activity/Activity package numbers when using Review Missing Activities feature</i>	
<b>Defect #:</b>	001-00-1-20875
<b>Ticket #:</b>	001-00-239215, 001-00-239329
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	PM > Lot Matrix > Update Wizard > Review Missing Activities > Base tab PM > Lot Matrix > Update Wizard > Review Missing Activities > Option tab In some cases the activity and activity package numbers were duplicated when using the review missing activities feature. This has been corrected.

<i>Company Purchase Order pre-fixes not applied on POs when there are no Project level pre-fixes</i>	
<b>Defect #:</b>	001-00-1-20638
<b>Ticket #:</b>	001-00-238352
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Admin > Company Setup > Purchasing Settings > System Generated PO Prefix Admin > Company Setup > Purchasing Settings > Manual PO Prefix When purchase order prefixes are not defined at the project level, the company level prefixes was not applied to purchase orders. This has been corrected.

<i>Issue with module navigator when generating POs for a NSO</i>	
<b>Defect #:</b>	001-00-1-20188
<b>Ticket #:</b>	001-00-237014
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	When working viewing a NSO in the NSO module and the 'Apply to PO' link was clicked, you would be take taken to the PM module, but the module navigator was not updated. This has been corrected.

<i>Issue with count of activities on the activity list page</i>	
<b>Defect #:</b>	001-00-1-20683
<b>Ticket #:</b>	001-00-237878
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	PM > Lot Matrix > Activity List > Standard View PM > Lot Matrix > Activity List > Budget View When looking at the count at the bottom of the activity list pages it shows the number of activities shown on the current list instead of the count of all the activities. This has been corrected.

## Admin

<i>Issue with Attributes tab when looking at Option details from Admin &gt; Projects &gt; Plans &gt; Options &gt; View</i>	
<b>Defect #:</b>	001-00-1-20029
<b>Ticket #:</b>	001-00-236464
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Admin > Projects > Plans > Options > View > Attributes tab When the Attributes tab was clicked on this page, the user was taken to the man option in DL > Options, rather than viewing the attribute details in the Admin section. This has been corrected.

<i>Proper evaluation/error checking of predecessor column for Schedule Template upload</i>	
<b>Defect #:</b>	001-00-1-20852
<b>Ticket #:</b>	001-00-229950
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Admin > Company Setup > Data Upload Wizard > Schedule Templates The following rules have been added to the validation of the predecessor value, with helpful error notes including the cell location on the spreadsheet: <ul style="list-style-type: none"> <li>• Multiple predecessors separated by commas are allowed, e.g. 5,6,7 or 5, 6, 7.</li> <li>• A Phase cannot have a predecessor.</li> <li>• A Phase cannot be a predecessor.</li> </ul>

**Error message when an invalid state is included in Trade Partner data upload**

<b>Defect #:</b>	001-00-1-20027
<b>Ticket #:</b>	001-00-236461
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Admin > Company Setup > Data Upload Wizard > Trade Partners When an invalid value for State is included on one of the records of the spreadsheet when uploading Trade Partner information an error message was shown. This has been corrected to show the location if the issue on the spreadsheet.

**'Plan Number' should not be a required field on the legacy buyers upload**

<b>Defect #:</b>	001-00-1-21489
<b>Ticket #:</b>	001-00-240719
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Admin > Company Setup > Data Library > Legacy Buyers The Legacy Buyers upload process has been updated. The 'Plan Number' field is no longer required since it is not a required field for plans.

**Issue with text survey fields when used on the WIK Form**

<b>Defect #:</b>	001-00-1-20270
<b>Ticket #:</b>	001-00-237338
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Admin > Projects > Project Settings > Webkit Prospect Form In some cases, the generated WIK prospect form was not accepting ZIP codes entered in regular question fields. This has been corrected.

**Data Library**

**Issue with scope of work of activities on options when adding option to plan**

<b>Defect #:</b>	001-00-1-20854
<b>Ticket #:</b>	001-00-233250
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
<b>Description:</b>	Data Library > Plans > Options > Add Option Code When an option was added to a plan, the scope of work data for the activities on those options did not carry over. This has been corrected.

**Issue with activity packages on the option activities edit page**

<b>Defect #:</b>	001-00-1-21162
<b>Ticket #:</b>	001-00-240028, 240432
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Data Library > Options > Edit > Edit Activities In some cases the edit activities page for options was not allowing correct entry of percentages for draw activity packages. This has been corrected.

## Bidding & Contracting

**Issue with demotion of unit of measure contracts**

<b>Defect #:</b>	001-00-1-21661
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Bidding & Contracting > Contracts > Unit of Measure > Promote In some cases an error message was shown when trying to promote the order of a unit of measure contract. This has been corrected.

**Archived activities hidden from Compare Bid/Contract pages**

<b>Defect #:</b>	001-00-1-19155
<b>Ticket #:</b>	001-00-233689
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	BC > Contracts > Compare BC > Contracts > Compare > Option BC > Bids > Compare BC > Bids > Compare > Option Archived activities are now hidden from these compare pages.

## Service

**Issue when entering phone/fax numbers for associated people**

<b>Defect #:</b>	001-00-1-20679
<b>Ticket #:</b>	001-00-238519
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	CS > Owners > Owner Name > Associate Person CS > Owners > Owner Name > Associated People tab > Edit When entering phone and fax numbers for an associated person the first three digits of the phone/fax number that were typed in were not saved, instead the first three digits for the main owner's phone number were used. This has been corrected.

### *Issue with the 'From' email address for service emails*

<b>Defect #:</b>	001-00-1-21031
<b>Ticket #:</b>	001-00-239561
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	CS > Owners > Owner name > Email this Owner When the 'From' email address was manually edited the typed in email address was not shown on the received email. This has been corrected.

### *Issue with how details of emails from email history for Owners is shown*

<b>Defect #:</b>	001-00-1-21380
<b>Ticket #:</b>	001-00-240743
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	CS > Owners > Owner Name > Email History < Click on an email subject When the subject of an email in the email history for an owner was clicked, the HTML code of email history was shown rather than the correct HTML format. This has been corrected.

## NSO

### *Issue with NSOs from terminated SPECS*

<b>Defect #:</b>	001-00-1-20787
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Sales > SPEC Accepted > Actions > Terminate SPEC In some cases when a SPEC was terminated some of the NSOs on the SPEC were not terminated, which would prevent the lot from being pulled from SPEC. This has been corrected.

## Documents

### *@@builder\_name\_global@@ tag not working on service emails*

<b>Defect #:</b>	001-00-1-20280
<b>Ticket #:</b>	001-00-240402
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	The @@builder_name_global@@ tag did not work on service emails. This has been corrected.



## Reports

### *Update to the view of the PDF version of on-demand reports*

<b>Defect #:</b>	001-00-1-21118
<b>Ticket #:</b>	001-00-239313
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
<b>Description:</b>	Reports > On-Demand Reports > Report Name > More Actions > Print (PDF) The PDF generated from on-demand reports has been updated to try to fit more data from the reports on the PDF page size.

## Messages

### *Agreement Submitted message missing information*

<b>Defect #:</b>	001-00-1-21581
<b>Ticket #:</b>	001-00-239914
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	The notification message generated when an agreement is submitted was missing the buyer's name. This has been corrected.

### *Update of messages related to NSO quotes*

<b>Defect #:</b>	001-00-1-20413
<b>Ticket #:</b>	001-00-219841
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	All notification messages related to NSO quotes have been updated to show information clearly.

## Accounting

### *Trade Partner drop down shows lot address instead of Trade Partner Name on accounting log*

<b>Defect #:</b>	001-00-1-21079
<b>Ticket #:</b>	001-00-239911
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Accounting > Log > Audit # > Approved tab The 'Trade Partner' drop down filter was showing the lot address instead of the TP Name on accounting log. This has been corrected.

**Issue with accounting QuickBooks account name fields**

<b>Defect #:</b>	001-00-1-20271
<b>Ticket #:</b>	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	Accounting > Setup When QuickBooks is the selected accounting package, these 3 fields are shown: Accounts Payable Account Name, Work-In-Progress Account Name, Purchase Order Account Name. When spaces or other non-alphanumerical characters were entered in these field an error would be shown. This has been corrected.

**Trade Partners**

**Issue with the Message forwarding default for Trade Partner NSO messages**

<b>Defect #:</b>	001-00-1-20148
<b>Ticket #:</b>	001-00-236720
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
<b>Description:</b>	The message forwarding setting default for NSO messages for new Trade Partners users was to 'Forward' instead of 'Don't Forward' like all other messages. This has been corrected.

## **BuildTopia Product Roadmap**

These are some of the new features and enhancements scheduled for future releases. 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.

### **Hot Fix Version 6.7.2.1, December 2015**

- Bug fixes.
- General usability updates.

### **Version 6.7.3, Q1 2016**

- Updates in Bidding and Contracting – 1<sup>st</sup> phase.
- DocuSign integration – 1<sup>st</sup> phase.
- General usability updates.
- Bug fixes.