



Version 6.8.0

Release Notes

March 16th 2016

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.....	9
BuildTopia Product Roadmap.....	14

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
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.

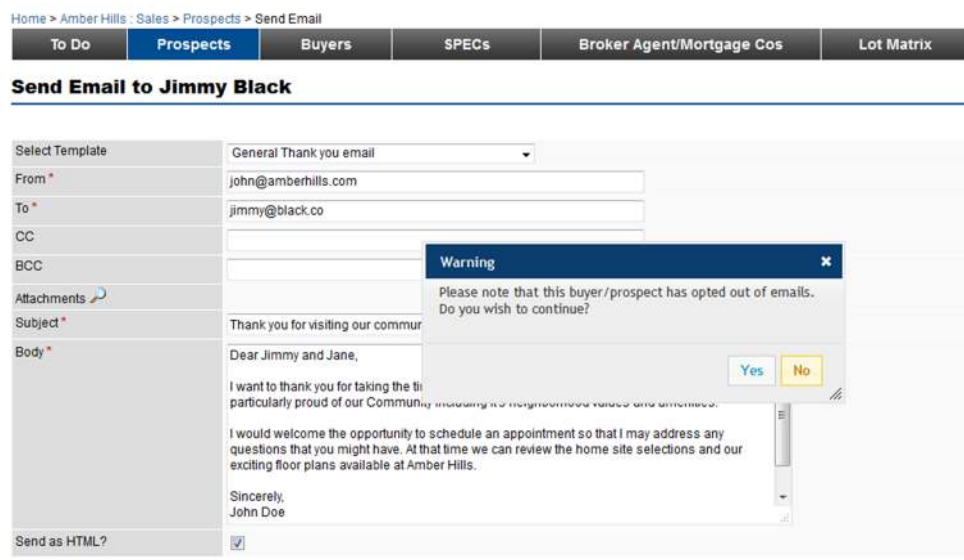
Telephone: 1 905 475-2209 or toll-free at 1 888 723-2222
Fax: 1 905 475-7204
Web: <http://www.constellationhb.com>

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.

<i>Updates in preparation for upcoming new Production and Training environments</i>	
Defect #:	001-00-21311, 001-00-21382, 001-00-21512, 200-00-801241, 200-00-801770
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTSERVICE
Description:	Updates to the BuildTopia architecture, codebase, and database have been made to prepare for the upcoming improved hardware. The new Production and Training environments consisting of 11 servers will improve application speed, improve redundancy, and allow future improvements and scalability to the application.

Sales

<i>New alert shown when trying to manually email a prospect/buyer who has opted out of emails</i>	
Defect #:	200-00-802021
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTSERVICE
Description:	<p>Sales > Prospects > Email Sales > Prospects > Prospect Name > Actions > Email Prospect Sales > Buyers > Email Sales > Buyers > Prospect Name > Actions > Email Buyer</p> <p>An alert will be shown when trying to manually email a prospect/buyer who has opted out of emails.</p>
Screenshots:	<p>Sales > Prospects > Emails</p>  <p>The screenshot shows the 'Send Email to Jimmy Black' interface. At the top, there are navigation tabs: 'To Do', 'Prospects', 'Buyers', 'SPECS', 'Broker Agent/Mortgage Cos', and 'Lot Matrix'. Below the tabs, the title is 'Send Email to Jimmy Black'. The interface includes a 'Select Template' dropdown set to 'General Thank you email', a 'From' field with 'john@amberhills.com', and a 'To' field with 'jimmy@black.co'. A 'Warning' dialog box is overlaid on the interface, with the text: 'Warning: Please note that this buyer/prospect has opted out of emails. Do you wish to continue?'. The dialog has 'Yes' and 'No' buttons. The email body text is partially visible, starting with 'Dear Jimmy and Jane, I want to thank you for taking the time to visit our community...'</p>

Update of @@options_selected_detail@@ & @@options_selected_detail2@@ to include attribute information

Defect #:	200-00-802298		
Ticket #:	001-00-243651		
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BTService
Description:	The @@options_selected_detail@@ & @@options_selected_detail2@@ tags have been updated to include attribute information.		

Comments captured while processing SPEC agreements

Defect #:	001-00-1-19688		
Ticket #:			
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BTService
Description:	<p>Sales > SPECs > Submit SPEC Sales > SPECs > SPEC Workup > Actions > Submit SPEC Sales > SPECs > SPEC Submitted > Actions > Accept SPEC Sales > SPECs > SPEC Submitted > Actions > Reject SPEC Sales > SPECs > SPEC Accepted > Actions > Terminate SPEC Comments will now be captured when completing the actions above, and will be shown on the 'Comments History' tab on the SPEC Agreement details page.</p>		

New standard print form, Pricing Addendum with Taxes by Category, added for Canadian accounts

Defect #:	001-00-1-22144		
Ticket #:			
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BTService
Description:	<p>Sales > Buyers > Agreement > Pricing Addendum with Taxes by Category A new print form, Pricing Addendum with Taxes by Category, has been added to Canadian accounts. It shows agreement details with detailed tax information, and options organized by option category.</p>		

Reports

Addition of fields to on-demand report data sets

Defect #:	001-00-1-20412, 200-00-800191		
Ticket #:	001-00-230532, 001-00-232441		
	<input checked="" type="checkbox"/> BTBuilder	<input checked="" type="checkbox"/> BTSales	<input type="checkbox"/> BTService
Description:	<p>Reports > On Demand Reports > New Report > Scheduling > Lot Data Reports > On Demand Reports > New Report > Scheduling > Lot Data (including Pre and Construction schedules) 'Last Modified Date', 'Last Modified User' and 'Last Modified Task' fields have been added to the data sets above.</p>		

Project Management

Updates to the purchase order search pages

Defect #:	001-00-21905, 001-00-1-22054
Ticket #:	101-31-015128
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	<p>Project Management > Purchase Orders Project Management > Purchase Orders > Advanced Search</p> <ul style="list-style-type: none"> The drop-down fields on the purchase order search pages have been updated to allow searching by typing in the values that the user is searching for. Columns to show 'Task' and 'Approve Date' have been added to the purchase orders list.
Screenshots:	

Sales > Purchase Orders > Advanced Search

Home > Amber Hills: Project Management > Purchase Orders > Advance Purchase Order Search

General

Update of accepted email formats

Defect #:	001-00-1-21978, 200-00-801818
Ticket #:	001-00-239954, 200-00-010389
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	All email fields have been updated to accept email addresses in the following formats, and all their combinations: name@e.com, name@example.com, na.me@example.com, name@example.com, name@exa-mples.com, name@exa.mple.com, name@ex.am.ple.com

Usability Updates

Defect #:	001-00-1-13165, 001-00-18993, 001-00-1-19142, 001-00-1-21907, 200-00-801137, 200-00-801550
Ticket #:	001-00-227825
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	<p>The following updates have been made to improve usability across the application:</p> <ul style="list-style-type: none"> • Sales > Lot Matrix: A link has been added to the Sales Lot Matrix that when clicked shows the workups for the lot. • Reports > On-Demand Reports > New Report: The default report layout has been changed from 'Tabular' to 'Summary.' • Data Library > Schedules: The page layout has been updated to make it easier to navigate. • The following have been added to the list of trades available for Trade Partners: Outside Structures and Window Sills. • The 'Create a Change Order' and 'Approve/Reject Change Order' pages for buyers and SPECs has been re-written in spring architecture to improve efficiency and allow future improvements.

Screenshots:

Sales > Lot Matrix

Broker Agent/Mortgage Cos	Lot Matrix	Price Plans	Price Options	Follow-Up
Release Lots for Sale/SPEC Pull Lots from Sale/SPEC				
Plan: -- All -- Sales Status: -- All -- Construction Status: -- All --				
Selected Plan	Sales Status	Construction Status	Release	Actions
	Released for Sale and SPEC	Pending	Pull From Sale Pull From SPEC	0 Edit View Workups
	Released for Sale and SPEC	Pending	Pull From Sale Pull From SPEC	0 Edit View Workups
	Released for Sale and SPEC	Pending	Pull From Sale Pull From SPEC	0 Edit View Workups
	Released for Sale and SPEC	Pending	Pull From Sale Pull From SPEC	0 Edit View Workups

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

Verification of opt-out settings when sending emails to prospects/buyers

Defect #:	001-00-1-20684
Ticket #:	001-00-237813
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BService
Description:	All methods of sending emails in the application (follow-up campaigns, marketing campaigns, Sales > Prospects > Advanced Search & Mass Email) have been updated to ensure that prospects/buyers who have opted out of emails cannot receive emails.

Corrections to the financials calculations page

Defect #:	001-00-1-22347, 200-00-801242, 200-00-801616
Ticket #:	001-00-243971, 001-00-243981, 200-00-006539
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	<p>Admin > Company Setup > Loan Programs > Add a Loan Program Admin > Company Setup > Loan Programs > Edit Sales > Prospects > Financials Sales > Buyers > Buyer Name > Financials tab</p> <ul style="list-style-type: none"> The 'Term (Months)' and 'Interest Rate (%)' fields for loans programs have been updated to only accept positive numbers. The calculated financials could not be saved when the annual income was not entered. To avoid this annual income is now required.

Issue with the option description shown on the options section of the agreement pages

Defect #:	200-00-801614
Ticket #:	001-00-243453
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BService
Description:	<p>Sales > Buyers > Agreement > Options & NSOs tab Sales > SPECS > Agreement > Options & NSOs tab</p> <p>In rare cases where the option description was blank when an option was added to an agreement, the option description from the plan option level was shown, which caused confusion. This has been corrected.</p>

Issue when trying to terminate a sales agreement

Defect #:	200-00-801730
Ticket #:	200-00-011557
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Sales > Buyers > Finalize Agreement > Terminate Agreement In some cases an error message was shown when terminating a sales agreement. This has been corrected.

Data Library

Issue with activity packages on the plan option activities edit page

Defect #:	001-00-1-22099
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Plans > Options > Edit > Edit Activities In some cases the edit activities page for plan options was not allowing correct entry of percentages for draw activity packages. This has been corrected.

Issue with deletion of new unit of measure activities

Defect #:	001-00-1-21992
Ticket #:	001-00-239775, 001-00-243135
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Activities > Activities tab > Delete An error message was shown when trying to delete newly added unit of measure activities. This issue has been corrected.

Scheduling

Issue with predecessors on precedence schedules/schedule templates

Defect #:	200-00-800523, 200-00-800525, 200-00-801196
Ticket #:	001-00-243493
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Schedules > Add Phase Data Library > Schedules > View > Edit (a task) > Edit Predecessors PM > Lot Matrix > Review Schedule > Edit (a task) > Edit Predecessors PM > Lot Matrix > Review Schedule > Add Pre-Construction Phase PM > Lot Matrix > Review Schedule > Add Construction Phase <ul style="list-style-type: none">The scheduling functionality does not allow selection of phases as predecessors, but some pages showed phases as available for selection as predecessors. The relevant scheduling pages have been updated to correct this.The scheduling functionality does not allow phases to have predecessors, but some pages allowed selection of predecessors for phases. The relevant scheduling pages have been updated to correct this.An error message was shown when invalid tasks (tasks that would result in a circular reference) were selected as predecessors for a task. This has been corrected.

Issue when deleting phases from precedence schedule templates

Defect #:	001-00-1-22178
Ticket #:	001-00-243492
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Schedules > Schedule name An error message was shown when deleting phases from precedence schedule templates. This has been corrected.

Update to the Quick Schedule process for updating schedule tasks

Defect #:	001-00-1-19861
Ticket #:	001-00-232410
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Project Management > Lot Matrix > Quick Schedule The Quick Schedule process has been updated to complete the process of saving changes to selected tasks much faster than in the past.

Issue with the 'Show/Hide' button for schedule templates

Defect #:	001-00-1-22354
Ticket #:	001-00-243832
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	Data Library > Schedules > Schedule name The 'Show/Hide' button for schedule templates was not working. This has been corrected.

Project Management

Issue with the original budgets when using the Update Wizard to add missing activities

Defect #:	200-00-801619
Ticket #:	
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Update Wizard > 'Add Missing Activities' button When activities were added using the 'Add Missing Activities' button the original budgets for the activities were not added. This has been corrected.

Issue with sorting of Purchase Orders on the PO list

Defect #:	001-00-1-22189
Ticket #:	001-00-243467
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	PM > Lot Matrix > Purchase Orders > Search An issue that caused inconsistent sorting of purchase orders on the purchase order list has been corrected.

Customer Service

Issue with service order aging settings

Defect #:	001-00-1-22341
Ticket #:	001-00-242262
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Admin > BTService Setup > Service Order > Settings Validation has been added to ensure that the value for the 'Delinquent' setting is always greater than the value for the 'Late' setting.

Issue with aging of open service orders

Defect #:	001-00-1-22113
Ticket #:	001-00-242262
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	CS > Service Orders > Open tab In some cases the age shown for late and delinquent service orders was incorrect. This has been corrected.

Bidding & Contracting

Issue with the comments field for Unit of Measure bids

Defect #:	001-00-1-21997
Ticket #:	001-00-242793
	<input checked="" type="checkbox"/> BTBuilder <input type="checkbox"/> BTSales <input type="checkbox"/> BTService
Description:	BC > Bids > Unit of Measure > Create The comments field shown when creating a unit of measure bid has been updated to accept up to 4000 characters.

Homebuyer Homepage

Issue when creating service requests on the Homebuyer Homepage

Defect #:	200-00-800759
Ticket #:	200-00-002223
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Homebuyer Homepage > Service tab > Submit a New Request The 'Save and Submit' button for new service requests allowed duplicate requests to be submitted at one time. This has been corrected.

General

Issue with how cents for the lot premium is displayed

Defect #:	200-00-801673
Ticket #:	200-00-011523
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	All lot premium fields have been updated to always show two characters.

Browser Related

Issue with downloading excel version of reports when using the Safari browser

Defect #:	001-00-1-21488
Ticket #:	001-00-240837
	<input checked="" type="checkbox"/> BTBuilder <input checked="" type="checkbox"/> BTSales <input checked="" type="checkbox"/> BTService
Description:	Reports > On-Demand Reports > Report Name > More Actions > 'Excel' Reports > On-Demand Reports > Report Name > More Actions > 'Export (Excel)' When using the Safari browser excel versions of on-demand reports could not be downloaded. This has been corrected.

BuildTopia Product Roadmap

These are some of the new features and enhancements scheduled for future releases in 2016. 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 Customer Care.

Deployment of new Production and Training environments, Spring 2016

- New Production and Training environments consisting of 11 servers that will improve application speed, improve redundancy, and allow future improvements and scalability to the application.

Version 6.8.1, 08/17/2016

- Bidding & Contracting improvements.
- DocuSign integration.
- General usability updates and bug fixes.