



BuildTopia

Powerful cloud-based construction management software for builders





BuildTopia

YOUR RETURN ON INVESTMENT



GREATER REVENUE

- Increase option sales per house/unit with high levels of customization
- Increase close rates with targeted marketing campaigns and follow-up
- Boost production capacity with existing staff
- Immediately deploy current pricing to the field



MEASURABLE REDUCTION IN COSTS

- Reduce administrative costs across your departments
- Quickly approve payments while ensuring accuracy
- Reduce warranty costs through responsive customer service
- Reduce direct construction costs with a competitive bidding process
- View real-time costs and variances before, during, and after construction



INCREASE IN VELOCITY AND EFFICIENCY

- Reduce project start times with streamlined bidding
- Drive efficiency at every stage of construction
- Collaborate in real-time with trades for all scheduling, purchasing, and selections
- Reduce warranty response time and cost with responsive customer care

Table of Contents

BuildTopia Overview	02
Sales Management & CRM	04
Sales & Marketing Process	04
Sales Management	05
Contract Management	05
Pricing & Options Management	05
Customer Relationship Management	05
Design Studio Manager	06
BuildTopia Enterprise Solution	08
Trade & Vendor Management	10
VendorGo/BuilderGo	11
Integrated Accounting	12
BuildTopia & Intuit Quickbooks	12
BuildTopia & Microsoft Dynamics SL	12
Dashboards & Reports	13
BuildTopia Dashboard	13
Powerful Reporting	13
Warranty & Service	15
Customer Service Request Management	15
Change Order Management	15
Quality Assurance	15
BuildTopia Implementation	16
Business Process Review	16
Administrative And Data Library Setup	16
Proof of Concept	16
Training	16
Go Live	16
BuildTopia Training	17
System Audit	17
Business Process Review	17
Ongoing Training	17
Technical Services & Customer Care	18



FULL-FEATURED SOFTWARE

THAT IS UNIQUELY DESIGNED, FAST TO DEPLOY, AND EASY TO IMPLEMENT AND USE — THAT'S THE BEAUTY OF BUILDTOPIA.

BuildTopia is an integrated construction management system tailor-made for the needs of residential homebuilders — bringing all tasks, processes, and workflow together into a single homebuilding hub. As a cloud-based system, the software keeps you connected to your staff, trade partners, and homebuyers to streamline the entire construction process — from sales, design, construction, warranty, and beyond.

With BuildTopia, you'll enjoy a fast ROI — saving time and money, while leveraging real-time data to make strategic business decisions.

BuildTopia Key Advantages:

- Integrates with most Accounting platforms, giving you flexibility to use the software you prefer.
- 100% cloud-based software — accessible in the office or from the field 24/7.
- True single-source solution with full project management capabilities.
- Eliminates the need for multiple software packages — no duplicated data or efforts.

BuildTopia



“BuildTopia has been an efficient and effective tool to help our company manage our projects and collect all the data necessary to make smart decisions about our future. It works well to house all the information our team needs at the click of a button.”

Ryan Delin | Director of Operations, Integrity Group





SALES MANAGEMENT & CRM

Manage every detail of the sales environment: leads, marketing campaigns, contract creation, pricing and options, customizations, and most importantly, your relationship with your customer.

Your Sales & Marketing Process with BuildTopia



SALES MANAGEMENT

Completely automate the sales environment from online marketing through contract generation.

- Build and price lots, plans and options in a centralized system in real time.
- Manage incentives, loan programs, and available brokers for a project.
- Create and enforce a sales and marketing plan to ensure consistent messaging for your prospects.

CONTRACT MANAGEMENT

Automatically distribute quotes and contracts with notifications to management for approval.

- Once approved, contracts are automatically generated by the system, saving hours of work.
- Increase the accuracy of your quotes, and manage and oversee a streamlined contract-creation process.
- With DocuSign integration, your contracts can be digitally signed and returned in minutes.
- Sell homes and upgrades faster, with greater accuracy and efficiency.



PRICING AND OPTIONS MANAGEMENT

Centrally manage products and pricing quickly and easily across your entire company.

- By maintaining an online options library in BuildTopia, put your design centre and sales team in the position to always sell the right product on the right lot at the right price.
- As a web-based application, internal and third-party sales agents can also log in to the system from anywhere allowing them to sell homes, options and upgrades efficiently.

CUSTOMER RELATIONSHIP MANAGEMENT

Harness all data from the very beginning of the customer lifecycle from sales through the end of the warranty phase.

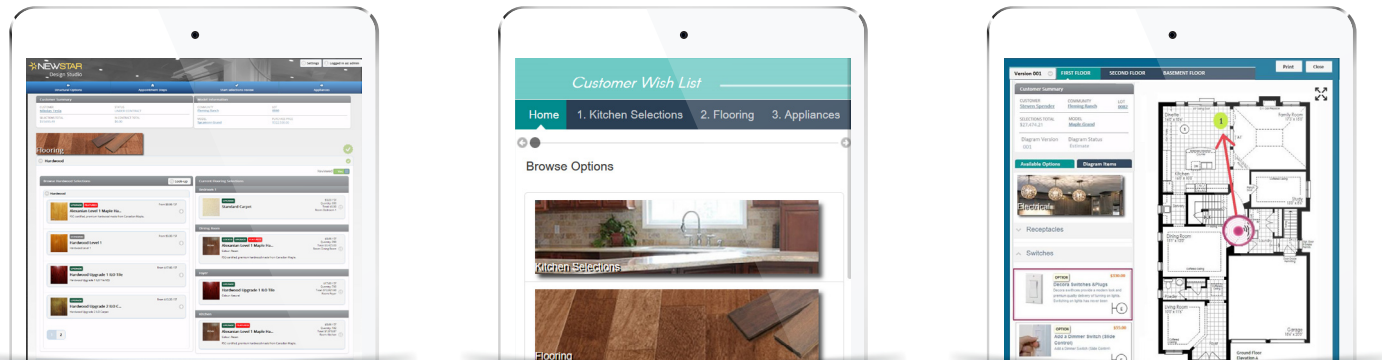
- Lower the cost of communication, speed up the sales cycle, and increase both customer satisfaction scores and referral ratios.
- Builders and real estate professionals realize the benefits of exceptional customer communication are not just lower warranty costs, but also powerful high-quality customer referrals.



DESIGN STUDIO MANAGER



Simplify the selection options process, increase customer upgrade revenue and improve design center workflow during your client design appointments.



Leverage a single environment for managing and simplifying your complex options selection process, while boosting your options revenue.

- Builder-defined workflows help standardize the options selection process
- Customer Wish List gives buyers access to a personalized online portal to preview options and prepare to build the home of their dreams
- Curated design collections can be created to inspire customers and guide their home personalization
- Run efficient design meetings, empowering your design studio staff to provide a guided experience with mobile touch capabilities.
- Floor Plans Module enables redlining of floor plans by positioning products in desired installation locations
- Alternate Room Sales feature enables floor plan layout changes based on the scope of applicable rooms and alternate room measurements

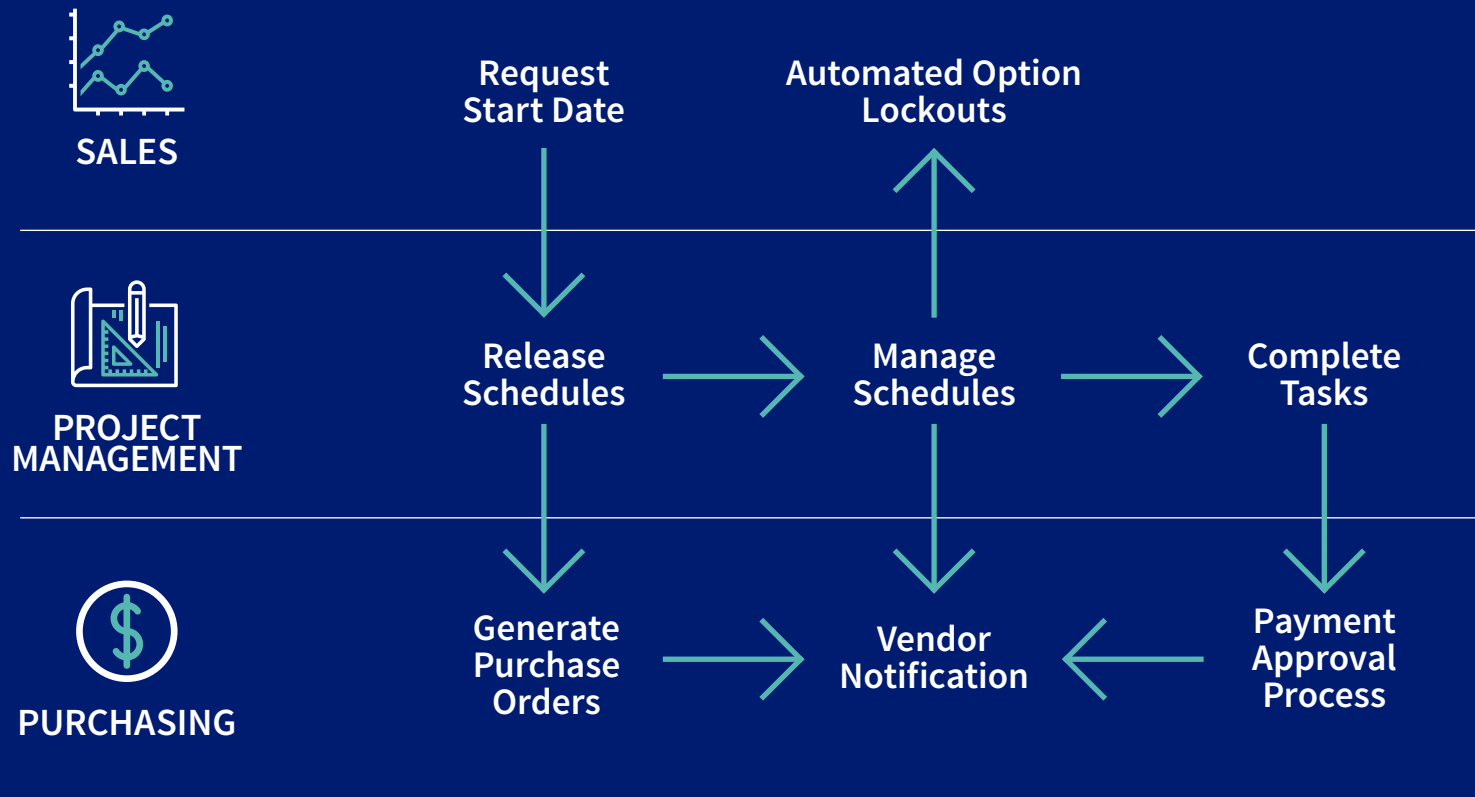




BUILDTOPIA ENTERPRISE SOLUTION

Builders can stay on-task and on-budget with powerful production tools and reporting across operational areas.

Home Production with BuildTopia



The integration of Sales and Purchasing to Project Management simplifies communication in the field, purchase order management, and eliminates costly mistakes.

BID MANAGEMENT

With centralized document management and bid package creation, easily distribute documents, bid packages and plan updates.

- Trade partners and suppliers can view the entire bid package online.
- Trades enter their bids digitally, saving you time and effort maintaining your purchasing database, with no double data entry.
- Easily track quotes to generate a total cost for each plan, option, task, and item.
- Control home performance with construction punch lists automatically sent to trades and require completion and approval prior to payment.

SCHEDULING AND PROJECT MANAGEMENT

Distribute real-time project management information across the entire BuildTopia role-based application.

- Easily manage schedules across a project and identify resource conflicts.
- Everyone involved in the project including lenders, customers, internal personnel, and trade partners can see personalized and customized current and future schedules.
- Expedite payment for work completed, reducing cycle times.
- With real-time information in a centralized system, management gains seamless top-down visibility on the status of each project.

PURCHASING

Real-time cost control with online budget and variance tracking, purchase order generation and approval, and collaboration between trade partners and the builder.

- BuildTopia purchase orders can be generated based on current contracts with trade partners and real-time scheduling.
- Flexible approval workflow and variance processing ensures purchasing accuracy.
- Approvals can be combined with schedule updates, streamlining the scheduling and approval process.
- Distribute purchase orders electronically and expedite payments to trade partners.
- Employ a "management by exception" principle and start each project with finite job cost budgets based on the actual purchase orders that directly relate to the trade partner's contract with the builder.

DOCUMENT MANAGEMENT

This powerful communications tool associates documents to various entries within BuildTopia to make them available across your organization and to trades as required.

- Collaboration is simplified as the "master" document is never questioned.
- Communication with trades is standardized and streamlined based on the builder's needs.

SEE TRADE MANAGEMENT >>> NEXT PAGE





TRADE & VENDOR MANAGEMENT



Powerful collaboration tools ensure that builders and suppliers are working from a single source of truth – online, in real time.

TradeTopia gives you easy access to critical information on any of your devices. With it you can streamline your processes, improving your efficiencies. You are able to share real-time construction job information including schedules, purchase orders, documents, and more. Built to ensure builders and suppliers are working from a single source of truth – online, in real-time.

Powerful Collaboration Tools to Manage your Trades



BID MANAGEMENT

Efficiently work with builders, understand project information and collaborate on bid packages.

- ✓ View the entire bid package online.
- ✓ Enter bids digitally, saving you time and effort. Eliminate errors caused by duplicate data entry.
- ✓ Track quotes and keep up to date on bid status.
- ✓ Notify builders of approvals and completions.



PURCHASING

Submit purchase and change orders and generate invoices to submit directly to builders.

- ✓ Receive purchase orders based on current contracts and real-time scheduling.
- ✓ Easy approval process to ensure accuracy.
- ✓ View detailed scope of work and view payment approvals.



SCHEDULING & PROJECT MANAGEMENT

Automatically receive schedule updates and preview all job schedules.

- ✓ Easily see all job schedules and identify resource conflicts.
- ✓ Reduced cycle times by receiving payments quicker, based on task completions.



SERVICE ORDERS

Manage service requests through to completion and collaborate with the builder.

- ✓ Receive service orders electronically.
- ✓ View pictures, documents and notes.
- ✓ Track and report on issues to continuously learn and improve.

PLUS MORE

BuildTopia has committed to more development of the TradeTopia portal. In the future we are looking forward to additional tools and functionality. Some examples on the roadmap are:

- ✓ Insurance details; notifications on approaching expiry dates
- ✓ Enhanced Purchase Order information: Work status & Payment details
- ✓ VendorGo (mobile app), including offline capability
- ✓ Team dispatching
- ✓ Lien waver management
- ✓ Additional reporting & dashboards
- ✓ Reference incentives



VENDORGO/BUILDERGO

BuilderGO and VenderGO are connected mobile apps that help connect builders and vendors with real-time information while in the field.



Vendors and builders can view and combine their data into an integrated schedule and a single account.



Fewer Errors - Get real-time information from all your builders to minimize errors and wasted effort.



Simplify vendors' daily tasks and communication while optimizing the return on investment for builders.



Flexible and easy to use.



Manage your workload more efficiently by sorting and setting priorities.



Offline Functionality - Stay connected while out of range, with mobile device integration technology.





INTEGRATED ACCOUNTING

Experience the power of integrated accounting. Specifically designed to interface with your accounting system, BuildTopia is a true, fully integrated enterprise construction management software solution.

SAMPLE ACCOUNTING INTEGRATIONS



BUILDTOPIA & INTUIT QUICKBOOKS

BuildTopia links with QuickBooks, the most popular accounting package for residential developers, and includes:

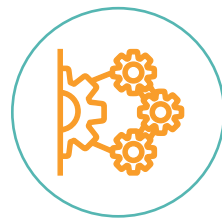
- Technical integration support, documentation and enhancements
- Partnerships to assure collaboration on support, development and distribution
- Support for Pro, Premium, Enterprise and Contractor Edition
- On-staff BuildTopia / QuickBooks Certified ProAdvisors



BUILDTOPIA & MICROSOFT DYNAMICS SL

BuildTopia's real-time workflow integration with Microsoft Dynamics, a next-generation construction accounting system, includes:

- Multi-company accounting and transaction processing Centralized cash management/multiple check processing Land development cost management
- Detailed job cost budgeting
- Management of vendor insurance and lien waivers
- Real-time integration with BuildTopia



BUILDTOPIA & SAGE

BuildTopia links to Sage, building a future with data integration for residential homebuilders, includes:

- Manage your entire construction project or property lifecycle with the industry's most complete financial management solution.
- Easy access to complete critical business and project information for all homebuilders.
- Native-cloud accounting solution built for the specific needs of commercial contractors and real estate developers.
- Drive increased productivity and better decision making through robust financial reporting tools.



DASHBOARDS & REPORTS

Leverage real-time data analysis to reduce construction cycle times, identify resource conflicts, eliminate mistakes, and cut costs.



BUILDTOPIA DASHBOARD

Your data will leap off the screen with BuildTopia Dashboards — a platform that provides visual representation of your complete homebuilder data, making important business insights just a glance away.

- Improve business clarity with instant visibility to critical metrics.
- Work faster with real-time data and the ability to remove the reports you don't need.
- Empower employees to take ownership and track how their performance directly impacts business results.
- Access intuitive graphs for Management, Constructions, Purchasing, Sales, and Warranty departments.
- Reports available in colorful formats that are easy to add to presentations.



POWERFUL REPORTING

To meet the complex management reporting and data analysis needs of residential developers, BuildTopia allows the quick and easy creation of powerful real-time management reports across all operational areas – including your integrated accounting solution. Reports can be automatically emailed with a frequency of your choice. Use permissions to control who has access to each type of report.

STANDARD REPORTS

- Off-the-shelf standard reports with pre-defined data sets and formatting, available from the Reports tab. Everyday reports are at your fingertips.

ON-DEMAND REPORTS

- Customizable reports with multiple formatting, data set, field, and filtering logic options.
- On-Demand Reports may be saved as private, publicly viewable, or publicly editable depending on the purpose of the report and the users requiring access to it.



WARRANTY & SERVICE

Increase customer satisfaction through responsive customer care via a personalized online homeowner portal. BuildTopia provides full control of the customer service process, and therefore full control over your relationships with your customers.

1

CUSTOMER SERVICE REQUEST MANAGEMENT

Seamlessly communicate with staff and trade partners about customer service issues.

- Connect directly with homeowners with online warranty claim submissions.
- Establish superior customer service with a simple online design.
- Powerful, customizable data management views.

2

SERVICE ORDER MANAGEMENT

Create service orders and assign to internal and external resources for fulfillment.

- Service orders can include multiple line items related to a request and supports back charging.
- Service orders can be sent to trade partners via email.
- Trade partners can collaborate on service orders online with pictures, documents and notes on the BuildTopia Trade Network.

3

QUALITY ASSURANCE

Record the defect and/or root cause for any punchlist item or warranty request.

- Tracking and reporting on defect information can help you improve construction quality and proactively implement value engineering for future projects.





BUILDTOPIA IMPLEMENTATION

Maximize the value of your software investment. Our Services team of home building software experts will lead your organization from software installation through implementation:

1

BUSINESS PROCESS REVIEW

- We will work with you and your team to create an implementation and project plan with your goals in mind.
- We meet with each department to understand your business requirements prior to system configuration and set system goals for your new software system.

2

ADMINISTRATIVE AND DATA LIBRARY SETUP

- Building upon the Business Process Review we define coding structures, system configuration, system security and plan data.
- We will work with each department for data building to create a database that will streamline your workflow for your proof of concept.

3

PROOF OF CONCEPT

- Data loading to the training environment
- The Proof of Concept confirms the assumptions made during the Administrative and Data Library Setup and allows us to “prove” the concept will work for you long term.
- Data Loading to the production environment based on Proof of Concept.

4

TRAINING

- Following the POC we will ensure your data and your end users are trained and ready to go live with use of BuildTopia.
- End users from each department will participate in training to ensure they have knowledge to effectively do their job and begin use of their software on a daily basis.

5

GO LIVE

- At the time of go-live, all active and new projects will be in your new software system and you will have one single system to manage all of production needs.
- We will be supporting the go live as needed by each client.



BUILDTOPIA TRAINING

Driving effective system adoption doesn't end with software “go-live”. It's an ongoing effort and needs to be revisited on a regular basis, and the Services team is ready to assist you.



SYSTEM AUDIT

- As your business has evolved, your data library setup you made initially may not be ideal moving forward. The “System Audit” will review your current system and data library and provide a written report that identifies any “red flag” concerns or areas of your system



BUSINESS PROCESS REVIEW

- Our “Business Process Review” meets with each functional department, provides written recommendations and a recommended plan for the implementation of these changes.



ONGOING TRAINING

- New modules, functionality new to your company, and new employees often require additional training. Our consultants are available to provide training onsite or over the internet as needed.
- Regular re-training is offered when there are new software updates or new changes to the client's business.





We give you the power to build smarter.



Technical Services

As the largest provider of home building software, we are dedicated to continuously improving our home construction software with user groups and early adopter programs that allow our builders to influence and guide our development efforts.

- Scalable and secure cloud based solution accessed from any web browser
- Over 100 releases annually with thousands of enhancements
- Builder influenced product enhancements
- Largest development staff in the industry
- Online Help Center

Customer Care

The industry's most comprehensive customer care program delivers product assistance, technical expertise, and innovative self-service tools. We are here to help —24 hours a day, 7 days a week. Our world-class Customer Care Team delivers value for your organization.

- Talk to real people with home building software expertise within seconds of dialling our toll-free client service number.
- You'll always know where your ticket stands — with status updates available via email and phone.
- A two-tier escalation system — and managerial attention when needed — ensures your issue always receives the proper attention.
- Our team is happy to schedule training at your convenience.
- As a partner in your success, we employ a feedback loop to help us continue to deliver expeditious and thorough service.

Our Story

About Constellation HomeBuilder Systems

As the largest provider of software and services in the building industry, Constellation HomeBuilder Systems has two goals: to empower builders with information to drive business objectives and to simplify the process of building homes and condos so you can maximize your return on investment.

We provide innovative solutions as standalone or integrated systems, and our team of home building software experts bridges the gap between construction and technology. Our software is built on the feedback and best practices provided by our customers – the best and brightest home builders across North America.

We are a division of [Constellation Software](#), publicly traded on the Toronto Stock Exchange.

About Constellation Software Inc.

ACQUIRING, MANAGING & BUILDING
MARKET-LEADING SOFTWARE

Constellation Software is a leading provider of software and services to a select group of public and private sector markets. We acquire, manage and build industry specific software businesses which provide specialized, mission-critical software solutions that address the particular needs of our customers.

Our businesses continuously develop innovative solutions that enable our customers to achieve their objectives. With over 125,000 customers in over 100 countries and a proven track record of solid growth, we're establishing a broad portfolio of software businesses to provide our customers and shareholders with exceptional returns.



www.constellationhb.com

1-888-723-2222 | sales@constellationhb.com