Overview

Users will access the BTMobile product with a handheld device. Currently, BTMobile supports the following handheld devices.

- Treo 600/650

- Blackberry 7250 (or any Blackberry equipped with a full keyboard)

- Apple iPhone

Note: BuildTopia provides training specifically on the BTMobile product and its functionality. Users are responsible for securing any additional training necessary to use their preferred handheld devices.

Step 1: Set BTMobile Permissions and Roles

You will need to go into BuildTopia and set the BTMobile permissions and roles for your Company and for each of your BTMobile users.

Follow these steps to set up BTMobile permissions and roles for your company:

1. Log onto **https://app1.buildtopia.com**

2. Click on **Admin** > **Company Setup** > **BTMobile Roles**.

3. There is a default administrator role that has been established by BuildTopia. This role cannot be edited.

4. Click **Add Wireless Role**. Enter the name of the role you are creating and select the appropriate permissions.

5. Once you have added 2 or more custom BTMobile roles, click **Compare**. This will allow you to view the roles and permissions side by side for editing purposes.

Follow these steps to assign permissions and roles to your BTMobile users:

1. Log onto **https://app1.buildtopia.com**

2. Click on **Admin** > **Users.**

3. Click on **Permissions and Roles.**

4. Next to BTMobile Role, use the drop down menu and select the appropriate role for the user.

5. Repeat #1-4 for each of your BTMobile users**.**

Step 2: Set Your Handheld Device Settings

To maximize the success of your user experience, BuildTopia recommends that you set the following settings on your handheld device.

Blackberry

1. After accessing the BTMobile website, click anywhere on the screen.

2. Scroll to **Options**, then click.

3. Scroll to **Browser Configuration**, then click.

4. Scroll to each of the following, double-clicking to checkmark the checkbox.

   a. Support HTML Tables

   b. Support JavaScript

   c. Allow JavaScript popups

   d. Support Style Sheets

   e. Right-click. Scroll to **Save**, then click

Treo

1. Click on **Blazer.** This is the default web browser for the Treo.

2. Go to the Options Menu. Click **Preferences**.

3. Under the page tab, uncheck **Show Address Bar**.

4. Under the general tab, disable javascript, images and cookies.

5. Under the advanced tab, set the memory limit for storing pages to **zero megabytes**.

6. Click on **Clear Cache On Exit**.

7. Click **OK** to save settings.

iPhone

No specific setup necessary.

Step 3: Bookmark the BTMobile Website (Blackberry & Treo).

Follow these steps to access and then bookmark the BTMobile website. *Note: While you will only complete this bookmark task once, you will need to launch this website each time you access BTMobile using the Production server.*

1. After starting your handheld device, scroll through icons on screen, clicking the icon labeled **Browser**.

2. Click **Home Page**.

3. Scroll to **Go To**, then click.

4. Type in the following web address in the window provided: **https://app1.buildtopia.com/english_exec/wl login**

5. Scroll to **OK**, then click.

6. Once the BuildTopia login page launches, click once in the window. Scroll to **Add Bookmark**, then click.

7. Type **BTMobile** in the **Name** field.

8. Scroll to **Add**, then click.

You have successfully bookmarked the BTMobile site within the BuildTopia Production server (Blackberry and Treo).

Step 3: Bookmark the BTMobile Website (iPhone).

Follow these steps to access and then bookmark the BTMobile website. *Note: While you will only complete this bookmark task once, you will need to launch this website each time you access BTMobile using the Production server.*

1. Launch **Safari** by tapping the Safari icon.

2. Tap the URL address bar at the top of the screen and type in: **https://app1.buildtopia.com/english_exec/wl login**

3. When the login page loads, tap the + button on the menu at the bottom of the screen, then tap the "**Add to Home Screen**" button.

4. Enter the Title BTMobile in the box, then click the "**Add**" button in the upper right hand corner.

5. The BTMobile icon will now appear next to other iPhone application icons on the home menu, and can be launched by tapping the icon.

You have successfully bookmarked the BTMobile site within the BuildTopia Production server (iPhone).

Step 4: Login to the BT Mobile Application.

BTMobile uses the same login information as the BuildTopia application. Enter your company ID, username and password into the appropriate fields and click **Login**.

Step 5: Use the Search Functionality.

From the BTMobile homepage (click on the BTMobile logo to access the homepage), the search functionality can be accessed by clicking on the magnifying glass located to the right of the BTMobile logo.

1. Search by lot #.

2. Search by lot address.

3. Search by trade partner

From the BTMobile homepage, the scheduling functionality can be accessed by clicking on the **Scheduling** link. Click on a project.

1. Select the lot schedules you want to view. Click **View Selected Lots**.

2. Using the current date as the completion date, select the tasks that have been completed and update the schedule.

3. Select additional lot schedules to view.

4. Repeat #2, using the projected completion date.

Step 6: Use the Messaging Functionality.

From the BTMobile homepage, the messaging functionality can be accessed by clicking on the **My Messages** link.

1. View **New** messages.

2. View **Read** messages.

3. Mark a new message as read and verify it has moved to the **Read Messages** tab.

Step 7: Use the Project List Functionality.

From the BTMobile homepage, the project list functionality can be accessed by clicking on the **Project List** link.

1. Ensure all projects are listed.

2. View the active, pending and complete lot lists.

Step 8: Use the View Lot Functionality.

From the **Project List** page, click on a project. For an active, pending and complete lot, click on the lot number.

1. View the lot details.

2. Click on **Opt**. View the options on the lot using the option category (cat), trade (trades) and option (opt) tabs.

3. Click on **CO**. View the CO's on the lot.

4. Click on **NSO**. View the NSO'S on the lot.

Step 9: Use the WO/PO Functionality.

From the **Project List** page, click on a project. For an active, pending and complete lot, click on the lot number. Click **WO/PO**.

1. View open, approved and void work/purchase orders.

2. Using open WO/PO's: Edit, reassign, approve and void.

Step 10: Use the Scheduling Functionality.

From the **Project List** page, click on a project. For an active, pending and complete lot, click on the lot number. Click **Sched**.

1. View the schedule milestones.

2. Edit milestone name, enter actual start and finish dates and comments for the milestone.

3. View the schedule tasks.

4. Edit the task name, enter the actual start and finish dates and comments for the milestone.

From the BTMobile homepage, the scheduling functionality can be accessed by clicking on the **Scheduling** link. Click on a project.

5. Select the lot schedules you want to view. Click **View Selected Lots**.

6. Using the current date as the completion date, select the tasks that have been completed and update the schedule.

7. Select additional lot schedules to view.

8. Repeat #2, using the projected completion date

Step 11: Use the Trade Partner Functionality.

From the BTMobile homepage, the trade partner functionality can be accessed by clicking on the **Trade Partners** link.

1. Click on the name of the trade partner. View the company information.

2. Click on **Contact**. View the contact list.

3. Click on the contact's name. View the contact information.

4. Repeat #1-3 for multiple trade partners.

Step 12: Reporting Your Feedback

If you encounter any bugs while using BTMobile or have any questions, comments or feedback please contact the BuildTopia Support at 800-773-0711 or support@buildtopia.com