FPS System Change History

Showing All Public Changes

Completed	Description and Note	Private

Build 6.0.9.68

Started 2/13/2018
Ended 3/14/2019

Updated Calculation (1)

- ☑ Estate Tax calculation and Estate Taxes. ☐

Build 6.0.9.67

Started 2/17/2017
Ended 3/13/2018

Updated Tax Code (1)

- ☑ Using new 2018 tax data ☐

Build 6.0.9.66

Started 2/19/2016
Ended 2/17/2017

Updated Tax Code (1)

- ☑ New tax adjustments to 2017 ☐

Build 6.0.9.65

Started 9/18/2015
Ended 2/19/2016

Fixed (1)

- ☑ Contact Card display not restoring correctly after shut down and restart. ☐

Updated Behavior (1)

- ☑ Calendar has new timezone data, when using reduced size input form ☐

Updated Calculation (2)

- ☑ Income Tax Calculation 2016 ☐
- ☑ Estate Tax for 2016 ☐

Updated Controls (1)

- ☑ New DevEx controls updated 15.2.4 ☐

User Request (1)

- [x] Ctrl+Enter after selecting from the drop down list of contacts on main screen, opens contact editor form. ☐

Build 6.0.9.64

Started 8/28/2015
Ended 9/17/2015

Fixed (1)

- [x] Financial Statement new record row, was not adding the new record into the grid correctly when hitting the down arrow, or cycling through all of columns ☐

Build 6.0.9.63

Started 4/25/2015
Ended 8/28/2015

Fixed (2)

- [x] PDF reports some landscape reports were displaying as portrait, fixed ☐
- [x] Fixed Name wrap issue with 'Trusts' (wasn't wrapping the Name of the Trust.) ☐

Updated Behavior (2)

- [x] Birthday reminders settings are now located at the bottom of main Screen [Birthday Alerts]. This is a check button and can quickly turned on or off by clicking it. This setting is saved between sessions. ☐
- [x] Allow Annuity Beneficiary to be edited with any name as well as drop down selection ☐

User Request (1)

- [x] Show a task reminder at startup, if due date is today or older - This setting is located at the bottom of main screen [Task Alerts]. This is a check button and can quickly turned on or off by clicking it. This setting is saved between sessions. ☐

Build 6.0.9.62

Started 1/27/2015
Ended 4/24/2015

Fixed (1)

- [x] Death Needs, Retirement Summary when exporting to PDF some numbers were missing ☐

New Feature (1)

- [x] Added Full week view on the Schedule. This shows 7 days in vertical format. ☐

Updated Behavior (1)

- ☑ Added Notes to the AutoRefresh Check box In the Options: Allows users to suppress automatic refresh when changing records to speed up operations on larger datasets. User Request (had over 100 mb of notes) See the new queries in the Contacts Table ☐

Updated Visual (2)

- ☑ Print ouput increased size of Date and Report in the Header, so that pdf exports show these ☐
- ☑ User contolled zooming of Pie Charts and Doughnut Charts using the report options dialog. This affects: Assets reports, Asset Mgmt and Withdrawal Reports. This allows the user to adjust the size of the graph depending on the number of segments and the label lengths. Note: This value may look good for one report but not for another, that is why the value is no longer hard coded, users can adjust a report for the best visual presentation. ☐

User Request (2)

- ☑ Description field in Financial Statement has been increased to 250 characters (User Request). Reports now wordwrap on the Description. ☐
- ☑ You can now enter custom descriptions for Wages/Salary and Interest/Dividends for client and spouse, on the "Wages" Input Screen. Reports will print the default descriptions unless modified. ☐

Build 6.0.9.61

Started 1/19/2015
Ended 1/27/2015

Fixed (1)

- ☑ Retirement input added Social Security calculation button for client and spouse. ☐

Build 6.0.9.60

Started 12/2/2014
Ended 1/19/2015

Added (2)

- ☑ Added Property View, which gives users a vertical grid (where rows are fields and columns are records. on the [Financial Statement] screen.. Click the [Property] button in the Ribbon Menu ☐

- [x] Added phone number and Notes fields to "Insurance Companies Report",. (A List of insurance companies in the database setup area) ☐

New Feature (2)

- [x] New Withdrawal Reports, Summary and Detail... user request (Rebecca Mueller) ☐
- [x] Investing into Retirement is now supported [Post Retirement Detail Reports]...user request (Jeff Pritchett) ☐

Updated Behavior (2)

- [x] Financial Statement, (Future) Types, will show gold background if not yet realized (Age payment begins) is greater than the clients current Age. Once the age is met the row will look like a normal row (no gold background) and its value will be reflected in the summary totals at the bottom of the input screen. All report calculations will follow this logic also. ☐
- [x] charts are now set to .emf (enhanced meta file format), giving them a crisper look, including the fonts. ☐

Updated Calculation (2)

- [x] Estate Planning tax updates for 2015 ☐
- [x] Income tax code updates for 2015 ☐

Updated Visual (2)

- [x] Estate Planning reports (flow charts) have been updated ☐
- [x] Due to changes in FinStmt grid a default layout is applied initially. Users can customize the grid at any time and changes will be saved. ☐

Build 6.0.9.59

Started 11/1/2014

Ended 12/2/2014

Fixed (1)

- [x] Cashflow input Money Received section ☐

Build 6.0.9.58

Started 9/1/2014

Ended 11/1/2014

New Feature (2)

- [x] You can now import ANY comma delimited file into the Contacts Table. A mapping wizard is used to map the fields of your file to the fields inside FPS. This appends ALL of the records in the file. NOTE: The wizard does not check for duplicates or sync it simply adds the records. [ ]
- [x] FPS Options > General Tab> User Settings> Auto Refresh - Checkbox: Controls the refresh of Contact List and Cards. If AutoRefresh is checked then changes made to contacts will cause a refresh of the Contact List/Cards automatically when returning. If unchecked then refresh is not automatic and can only be refreshed by clicking the Refresh Button, located in the upper menu > far right button. This speeds up operations for users with very large databases.Thank you Jeff P. for reporting this issue. [ ]

Updated Behavior (1)

- [x] Advisors input section has been changed to allow for custom entry in the "Type" field (type in whatever you want or select from the drop down). FPS3 allowed this, a user advised of the difference. Thank you Scott E. [ ]

Build 6.0.9.57

Started 7/10/2014
Ended 8/31/2014

Fixed (2)

- [x] Fixed long string rejection during "Microsoft Outlook" contact importing. [ ]
- [x] Fixed Notes on Financial Stmt, Users were unable to clear the notes without creating an error. [ ]

Updated Behavior (2)

- [x] Touch User interface default was set to touch screen (creates additional space between controls), it now defaults to mouse device (presents more information on the screen) [ ]
- [x] FPS new support number is 801-440-2728 [ ]

Build 6.0.9.56

Started 6/2/2014
Ended 7/9/2014

Added (1)

- [x] Added a new program option, Use Default Printer. Which if checked will print directly to your default printer without displaying the Windows Print Dialog where you have the option to switch printers or print settings. Goto FPS options (Gear Icon at the top left side of the program) > General Tab> User Settings section ☐

Fixed (2)

- [x] Word processor and spreadsheet sometimes would not open on top of main screen. ☐
- [x] "How To Video" menu in status bar, was not opening ☐

New Feature (6)

- [x] New Dashboards for; HomeState, Assets, Birthdays. Updates on most dashboards for consistency ☐
- [x] PDF document viewer, that works independent of Adobe. Located in the Tools menu… Tools>PDF Viewer ☐
- [x] Added a quick Print button to the Preview Pane, this will send the preview directly to the default printer. ☐
- [x] Added table tools, Header/Footer tools, and Picture Tools to the word processor. ☐
- [x] Added protection levels to spreadsheet ☐
- [x] added conditional formatting to spreadsheet ☐

Updated Behavior (3)

- [x] Contact.CardView reload header panel if turned off during customization. ☐
- [x] FPS6 now uses the full profile of Windows Framework 4.0 not the 'Client' profile. So if your told to install Framework 4.0, you’ll know that you only had the client profile of framework 4.0 installed, this is nothing to be alarmed about. A link to download Microsoft Framework 4.0 should display. Microsoft framework 4.0 can be downloaded here manually; http://www.microsoft.com/en-us/download/details.aspx?id=17718 ☐
- [x] The touch enabled feature has been broadened in scope so that most controls are adjusted. ☐

Build 6.0.9.55

Started 4/28/2014
Ended 6/1/2014

Added (1)

- [x] Added a record count box at the bottom of the Horizontal grids layouts

Fixed (1)

- [x] Concurrecy violation reported in several areas Financial Statement, meeting codes, Insurance, etc.. All input screens have been updated and fixed.

New Feature (1)

- [x] Added a Find box at the top of many of the Horizontal grids. To use the find feature on the Financial statement use CTRL+F.

Updated Behavior (1)

- [x] Insurance screen records are now sorted on entry order, so the oldest records are at the begining of the recordset, and the newest record is at the end of the recordset.

Updated Controls (1)

- [x] Numerous minor updates.

Build 6.0.9.54

Started 4/16/2014

Ended 4/28/2014

Fixed (1)

- [x] Year Selected on Startup was not correct, when printing reports it had current year even though it said 2013

New Feature (2)

- [x] Added an option to show or hide birthday popups on main screen, Using "Birthday Reminders" on FPS Options Screen, the default is true
- [x] Contact list: added check boxes for muliti selection in some column filters, to see an example click the employer filter (located in the header of the column the little icon in the right corner)

Updated Behavior (2)

- [x] Recent Files and Folders: If a link is no longerworking, you will have the option to remove it from the list. You can now have up to 30 itmes in each recent list.

- [x] You now have the option to run the last filter setting between sessions, using "Remember Filter" in FPS Options Screen it defaults to True. In other words if you were filtering on clients, when you restart the program it will be filtered on clients. [ ]

Build 6.0.9.53

Started 3/26/2014
Ended 4/15/2014

Added (2)

- [x] Page Setup Button in Words Menu [ ]
- [x] FPS Options Dialog added to quick access keys [ ]

Fixed (2)

- [x] Calendar fixed saving and editing new records issue [ ]
- [x] Fixed: Words and Spreadsheet File Handling [ ]

New Feature (5)

- [x] Spreadsheet Tool: added charting, Quick Action Keys [ ]
- [x] WordsTool: Picture Formatting, Quick Action keys [ ]
- [x] Birthday Popups [ ]
- [x] The FPS menu's now support "Touch User Interface" (Gives more space between commands optimized for use with touch screens). To use the touch ribbon interface, click the hand with a finger pointing upward which is located at the very top of main screen, last image on the right, then select which interface you would like. [ ]
- [x] Date filtering on Calendar, to speed up loading of data, If you select Last 90 Days it will show all appointments made in the last 90 days including all future appointments and all re-occuring appointments regardless of the date it was made. This makes a significant improvement for databases with thousands of appointmens. There are other filters, 180 days, 1 year, 2 year, and Show All. [ ]

  The filter selector is located next to the Refresh button on the Calendar Menu.

Updated Behavior (1)

- [x] Re-ocurring data from appointments is removed since Version 3 data does not match version 6, new reoccurence after this update will be saved [ ]

Updated Visual (1)

- [x] Contact section main menu was updated

Build 6.0.9.52

Started 3/11/2014
Ended 3/26/2014

Fixed (1)

- [x] Fixed an error causing date labels to become hidden.

Build 6.0.9.51

Started 2/16/2014
Ended 3/11/2014

Added (1)

- [x] Label Margins Customization, so users can fine tune label printing, located in the labels menu, also located in options screen.

Build 6.0.9.50

Started 12/14/2013
Ended 2/16/2014

Fixed (2)

- [x] Numerous small updates and fixes
- [x] Family was added to the Type column on the Advisor Input screen however it was printing null. This is fixed, however if you have existing "Family" type records they will need to be changed to a different type and then reset to "Family" in order to see these changes. New records have no issues.

Build 6.0.9.49

Started 12/9/2013
Ended 12/14/2013

Fixed (3)

- [x] Fixed: Reports with "Description" of assets is now multi line to handle long names.
- [x] Fixed: Default PDF folder not applying -- > This fix applies to mapped drives also.
- [x] Fixed: Scheduler saving data issue -- recreated and fixed.

Build 6.0.9.48

Started 9/13/2013
Ended 12/9/2013

Fixed (2)

- [x] Numerous control updates

- [x] While testing V6, the “Family” Type of advisor has been left out of the Drop Down in the Advisor Data entry in the Type column ☐

Build 6.0.9.47

Started 8/30/2013

Ended 9/13/2013

Added (1)

- [x] Date Last Reviewed has been added to dates, Export Screen, (Contact, Spouse and All fields) ☐

Fixed (1)

- [x] Change the Display and entry of 0% values, so they show 0% and Zero is not blank on entry. ☐

Build 6.0.9.45

Started 7/18/2013

Ended 8/17/2013

Added (2)

- [x] How to Mail Merge Video ☐
- [x] added update feature to Query where the program can update all contacts salutations or familiar names to first name to avoid missing fields data in mail merge templates. (see Database tab on Query ribbon) ☐

Fixed (2)

- [x] Query-Dates with a profile ☐
- [x] Word Processing Saving new documents creating file error FIXED ☐

Build 6.0.9.44

Started 6/11/2013

Ended 7/17/2013

Added (3)

- [x] User controllable Alternative colors Go to Options>PersonalSettings>Alternative Color Options ☐
- [x] 3 new office 2013 skins ☐
- [x] Added additional training videos.. See main screen bottom left ☐

Fixed (5)

- [x] Calculated Fields in Death Needs show Alternative color Changes ☐

- ☑ Death Income Needs: fixed chart if income exceeds what's needed overlap situation, increased font size, removed X-axis line ☐
- ☑ Fixed latest version link ☐
- ☑ Estate Planning all reports alignment ☐
- ☑ Estate Present Value Chart, fonts larger and alignment ☐

New Feature (1)

- ☑ Added Spreadsheet form for testing (located on tools tab) ☐

Updated Behavior (3)

- ☑ Changed Chart image format -> PDF files should be much smaller if a chart is included. ☐
- ☑ Contact list allow pixel scrolling on list view and login views ☐
- ☑ Updated many features in grids and report printouts, PDF engine ☐

Updated Visual (2)

- ☑ Contact Summary Customization Video ☐
- ☑ Made Fonts larger in ALL Charts, so they are much easer to read in the reports! ☐

User Request (1)

- ☑ Retirement Changed Post Retirement Income Graph so it displays single line for Needed ☐

Build 6.0.9.43

Started 5/16/2013

Ended 6/11/2013

Fixed (1)

- ☑ Corrected Font issue in Charts, making fonts clearer in xy titles and pdf exports ☐

New Feature (1)

- ☑ Pivot Grid Added over 70 pre-defined templates to the installation ☐

Updated Behavior (2)

- ☑ Added High speed download links to exe, and added list of changes to exe. ☐

- [x] New Income Tax data for future years ☐

Updated Visual (1)

- [x] Changed Icon to Green and Changed the Splash Screen to match Website ☐

Build 6.0.9.42

Started 5/1/2013
Ended 5/16/2013

Added (1)

- [x] Added Version in FPS - Form Caption ☐

Fixed (1)

- [x] Documents and Wills (empty string issue) ☐

Updated Visual (1)

- [x] Main Splash Add marquee Loading *Request* ☐

Build 6.0.9.41

Started 5/1/2013
Ended 5/1/2013

Updated Calculation (1)

- [x] Estate Planning - tax code revision ☐

Build 6.0.9.40

Started 4/28/2013
Ended 4/30/2013

Added (1)

- [x] Main Screen Shortcut Keys Added: (Ctrl+Shift) + C=New Contact, + A=New Appointment, + N= New Note, + T= New Task ☐

Fixed (2)

- [x] FIXED: Phone Mask issue to match all screens (###) ###-#### ☐
- [x] FIXED: Print Issue with mixed Portrait and Landscape, when printing directly from packets. ☐

Updated Behavior (1)

- [x] Tasks: Date Created changed from Read-only -> user modifiable ☐

Updated Visual (1)

- [x] Main Screen: Renamed "OLAP" to "Pivot Grid" ☐

Build 6.0.9.39

Started 4/19/2013
Ended 4/28/2013

Added (2)

- [x] Added Import Process, now supporting "Microsoft Outlook" and "LaserApp" ☐
- [x] Added New Summary View : File name= ClassicReduced FPS3 Summary_WithPhotos.xml ☐

Fixed (1)

- [x] Fixed Name Printed as issue with missing prefix suffix ☐

Updated Behavior (3)

- [x] Notes Module (list of notes), improved data loading speed (new select queries). ☐
- [x] Notes dialog : Date Created is modifiable by end users ☐
- [x] Notes dialog Behavior: allowing multiple record entry without closing screen. ☐

Updated Tax Code (1)

- [x] Estate Calculation: 2013 Estate Tax Law Updates, Estate Input: added new date field 12a (Exclusion Inflation Rate) ☐

Build 6.0.9.35

Started 4/15/2013
Ended 4/16/2013

Added (3)

- [x] Added Last Review field to ContactSummary ☐
- [x] Added Last Review to Query Dates Section and Ages Section ☐
- [x] Added Planner Initials to Planner input screens (edit personal data or Planner data). This will insert planner initials on new notes. This was added in xx.34 however the release notes did not reflect this change. ☐

Updated Behavior (1)

- [x] Contact Entry Dialog form, and contact editor in the Input section start with all fields expanded. ☐

Build 6.0.9.34

Started 3/13/2013
Ended 4/15/2013

Added (1)

- [x] Contact Data entry ... Added a field; DateReviewed (modifiable by user), changed dateCreated (it is now read-only), DateModified moved to Dates section. Spouse phones arranged vertically. Name on Reports, now populates with several options in the dropdown and is located in 2 locations including the spouse so when spouse name data is entered you can select there, moved pref mailing address to HomeAddress section, Changed display filters at the top.. other minor changes. ☐

Fixed (3)

- [x] Delete key not working on input screens (removed, delete and home hot keys) it was affecting too many things. ☐
- [x] Children fixed null value on SSN error ☐
- [x] More phone module: (fixed empty string issue on several fields) ☐

New Feature (2)

- [x] New Dashboard section for overall view of data. ☐
- [x] New OLAP module ☐

Updated Behavior (1)

- [x] Added Planner Initials to Planner Table so they are recalled when adding new notes ☐

Updated Internal tracking (2)

- [x] Photos are read-only on ContactSummary ☐
- [x] Added code to read FPS3 database Path and Planner on upgrades from previous users, so on initial startup it will load their last datapath they were working on in FPS3 and assign the planner ☐

Updated Visual (3)

- [x] Display file name of the last layout selected in the ContactSummary Header area ☐
- [x] Highlight selected link in Contact Group. (List, Cards, Summary, OLAP) ☐
- [x] Fixed Phone Mask to allow for empty string ☐

Build 6.0.9.30

Started 2/27/2013

Ended 3/12/2013

Added (1)

- [x] Added Assets Grid to contact Summary, added different layouts, try the new layouts to see assets grid, or add assets grid to existing layouts… customize: and look under hidden items for 'Assets Group' or 'Assets Grid' and then drag into your layout. ☐

Fixed (1)

- [x] Selection issue on return to contact list fixed (Ed's issue) ☐

Updated Behavior (1)

- [x] CTRL+Enter now selects and launches the contact editor dialog. Enter alone selects row if using arrow keys. ☐

Total Changes Count: 144 Items