



PlanPlus Web Advisor Release Notes

PlanPlus is pleased to announce the release of versions 4.12.3.7 and 4.12.3.8. These releases are mainly a few bug fixes and updates. You may have already received some of these updates onto your site. Some of the new features to existing features, along with some bug fixes and updates are outlined in this document.

ENHANCEMENTS TO EXISTING FEATURES

Version 4.12.3.7

Handling of education savings with regards to dependants

When education capital was entered on the Assets and Liabilities screen in previous versions, you would have to flag the ownership to the dependants in order for that capital to be included in the Education Capital Pool in the long term Life Goals Analysis. With this release, all accounts that are regulatory type "Education" will now be included in the Education Capital Pool.

This addresses the issue many sites had where integration brought over accounts from the back office that were RESP (Education) accounts but were owned by the parents, not the dependents.

Note that with this change, any dependent owned accounts that are NOT set to the "Education" regulatory type will no longer be included in the Education capital pool. This recognizes that dependent owned assets can be for other purposes.

BUGS FIXES AND UPDATES

Version 4.12.3.7

Auto Model

With the introduction of tiered retirement goals in our last update, the Automodel screen would incorrectly use one of the secondary retirement tiers as opposed to the first tier as is should have done. This has been resolved with this update.

Winfund Import

When client data from a Winfund Import excluded the ACB, an error would occur and stopped the import. This has been resolved in this update.

910 Import

When a 910 extract had less than 100 records the import would fail. This has been resolved.

Single Needs Calculator

The old version of the Single Need Calculator had an issue in the summary report. The alternatives section reported an error. This has been resolved. (Note also that we recommend you explore the new Retirement, Education and Other Goals calculators that were introduced in our last version as we are phasing out the old Single Need Calculator)

BUGS FIXES AND UPDATES
Version 4.12.3.7

Assets on Summary Screen

We've resolved the issue when you zero out asset figures on Assets and Liabilities screen it did not update client summary screen on the Home page.

Statement of Holdings

Changed labels within the Statement of Holdings for Malaysia clients it was showing "Registered" and Non-Registered" this is now showing "EPF" and "Non-EPF"

Searching in 910

We've resolved the problem where the search in 910 was not working when searching by SIN.

Security Selection

There was an issue when using the Security Selection options that you could Select a Portfolio or an Individual product but you could not use you're the "Add Favourite" products option. This has been resolved..

Malaysia tax

There was an issue for client's resident in Malaysia where 6 Cash Flow fields were being treated as relief's (deductions), but those same deductions were entered by the user under the Tax area of the detailed cash flow. We have removed the flag on these 6 items so that the advisor stays in control of what is a relief.

Efficient Frontier

An error in the Efficient Frontier calculator that caused it to not work unless you were on a specific client. You now can use the calculator as a freestanding tool without having to first select a client.

BUGS FIXES AND UPDATES
version 4.12.3.8

Retirement Need Calculator

By design the new Retirement Needs calculator wouldn't let you set the Average Tax Rate and the inflation rate to zero. Several users indicated that they would like this option and thus we have modified the calculator to allow this

Asset Allocation

The sort order in the asset allocation screen was making it look like the allocation was incorrect. This was just a display issue but has now been resolved

CORPORATE AND ADMINISTRATION FEATURES
version 4.12.3.8

Event Log

The event log browser was not tracking usage of the new retirement, education and other goal calculators. This has been resolved.