Client Manager and Task Manager System Version 1.05a Web Update Release Notes

CM 1.05a | CM/Win Version 1.05.32 | April 16, 2010

- New user interface conforms to other DATAIR systems, with a list bar that can be set on or off.
- Additional fields for Custom Reports. Added some existing company-level fields to Plan-level reports, including:
    - Accounting ID
    - Client Status
    - Full Admin Name
    - Total Fees, Assets and Premiums fields
    - Groups
    - Advisor Names and Types
    - Contact Email Address
- The “Record” menu now has an option called “Active Records Only”. In Client view, it shows only Active clients when checked. In Plan View, only Active plans are displayed. When you leave Client Manager, the system will save whether this option is checked or not for your next session.
- In Task Manager, the report “Plans without tasks” now gives you an option to run against only active plans.
- Various reported run-time errors have also been fixed
- Updated Sample Database
- Licensing is implemented in this version. You may need to run your license wizard to obtain an up-to-date license file. The system continues to operate in Demo Mode if no license s found.

Development of Client Manager is leading up to the ability to combine Pension System databases with the database used by Client Manager, Pension Reporter, Document System and FlexPlus later this year.

Before the databases are combined, there will at least one interim release of Client Manager that updates the database to a common format. At that time, you will be able to use Client Manager against the Pension System database if you choose.