Release Notes for *PGM Anywhere*
Release Date: 10/9/2014

Known Bugs

Ages and years in projection can be wrong for RLE and Bargain Sale in Summary of Benefits Projection chart
When you enter birth dates, the ages in brackets and the number of years in the projection shown in the Assumptions section of the Summary of Benefits Projection chart are wrong for retained life estates and bargain sales. "Projection runs for" always says "1" years and the first age in brackets is always "0" and the second age in brackets, if there is one, is always "-1". These errors occur only when a retained life estate or bargain sale is the first or only gift option selected.

Regular CRUT projected payout wrong when payout rate > net investment return
When the payout rate of a regular charitable remainder unitrust (CRUT) is greater than its net investment return, its projected payments to beneficiaries are being limited to its net investment return amount for each year. They shouldn't be. In the case of a regular CRUT (Unitrust Type = Regular), the payments to beneficiaries should ALWAYS be the unitrust payout rate multiplied by the then principal value of the CRUT (unitrust payout amount), regardless of the net investment return amount for the same year.

This error affects the values in the Payments to Beneficiary column of the Summary of Benefits Projection chart, the Total Benefit to Payment Recipient value in the Summary of Benefits Projection chart, and the line drawn in the Income Projection Line Graph.

New doesn't reset values correctly after Tools, Customize, or Users is opened
The New button at the top of the PGM Anywhere window is supposed to reset all default values to the default case stored in the application database ($10,000 gift annuity for a 72 year-old). It does this correctly unless you open and close Tools, Customize, or Users. In this case, instead of resetting to the default case in the application database, tapping New resets the defaults to the values they had at the time you most recently opened Tools, Customize, or Users.

Diagram icon default color incorrect when adding an organization
When you add an organization under Customize - Organizations, the default entry for "Color of icons in diagrams" is *#738c57*, which is a shade of green. This default code should be *#de5900,* which is a shade of orange that exactly matches the color of the default "Charity icon for diagrams" provided by PG Calc.

The default color for diagram arrows is *#babcbe*, which is a light gray. It is correct when adding an organization.

Error Messages

"Font is not available. Select another font from the list"
This message appears when you attempt to select a different font (while viewing Results) if the requested font is not resident on the device on which you are running *PGM Anywhere.*

In Firefox on a Samsung Galaxy (an Android-based tablet), this message appears anytime you attempt to change the font, regardless of whether the font is resident on your device. In this case, try changing the font while running *PGM Anywhere* in a different browser or on a different device.

"An error has occurred while processing DetailSection 'detail': Object reference not set to an instance of an object."
This message may appear when you try to view diagrams for the first time. If this is the case, close Results, then choose Customize, edit an Organization, and tap Done to save your Organization settings (you don't need to make any edits before tapping Done). Now, try viewing your diagrams and other selected presentations again.

Other Issues

Export to Excel button doesn't work
The Export to Excel button that appears in the Results window toolbar is not active in the initial release of *PGM Anywhere*. The Export to Excel button is grayed out to indicate that it is inactive, although this may not be obvious on some screens. We plan to activate the Export to Excel button in a future release.

Field value doesn't highlight when tapped on an iPad
This is standard browser behavior on the iPad. There is an expectation that tapping a field will highlight the entire field in future versions of Chrome and Safari.

User must click Done twice to make action occur
In Firefox only, there some actions that can be completed only when you tap twice in a row rather than the usual once. The solution is either to tap twice in these situations or to run *PGM Anywhere* in a different browser. Instances where this happens include:
- If you edit a Gift Annuity or Deferred Gift Annuity gift option, typing in new date of first payment for GA or DGA under Gift Options requires clicking Done twice.
- When you edit or add a Pooled Fund or Disclaimer under Customize and click Done
- When you change the gift date or birth dates in the Date - Lives – Term window and then click another item in the left navigation bar, such as Results, you have to click twice

in the left navigation bar to move on. This behavior occurs when you type your date change into the field, but not if you use the calendar control to revise the date.

Disclaimer text is cut off on the right

Disclaimer text can get cut off on the right when the font is too big. Try reducing the font size. Choosing a different font without changing the size might also help.

Calendar control does not display numbers for the days

We have seen this behavior on one machine when running *PGM Anywhere* in Internet Explorer 9. Try running *PGM Anywhere* in a later version of Internet Explorer or a different browser.

Results doesn't work on iPad 1

We have found that *PGM Anywhere* hangs up indefinitely when your run it on an iPad 1 (the original iPad) and tap Results. Try running *PGM Anywhere* on a different device: a later version of the iPad, on an Android-based tablet, or in a laptop or desktop browser.

PDF, Word, Excel, and Send Email icons are missing from Results toolbar

When you view Results in Safari on iOS8, the PDF, Word, Excel, and Send Email icons may be missing from the toolbar at the top of the Results window. Try running *PGM Anywhere* in Chrome on your iPad instead, or on a different device altogether.

Non-specific strange behavior in *PGM Anywhere*

You can get a variety of strange behaviors in *PGM Anywhere* if you have run a previous version of *PGM Anywhere* on your device and then run a newer version of *PGM Anywhere* without first clearing all cached files from your browser. Only clients who were beta testers of *PGM Anywhere* should be susceptible to this issue.

To clear the cache in Chrome:

1. In Chrome, tap ☰ and choose History.
2. Tap [Clear browsing data].
3. Check "Cached images and files" and choose how far back to delete them (from "the beginning of time" is safest)
4. Tap [Clear browsing data]

To clear the cache in FireFox:

1. In FireFox, tap ☰ and choose History.
2. Choose "Clear Recent History".
3. Check "Cache" and choose how far back to delete them (clear "everything" is safest)
4. Tap [Clear now].

To clear the cache in Safari (on iPad):

1. Tap the Settings icon on the iPad home screen.
2. Tap "Safari" in the left pane (you will need to scroll down).
3. Tap "Clear Cookies and Data" in the right pane (you may need to scroll down).
4. Tap [Clear].

To clear the cache in Internet Explorer 9, 10 or 11:

1. In Internet Explorer, tap and choose Safety > Delete browsing history.
2. Uncheck "Preserve Favorites website data" and check "Temporary Internet Files" and "Cookies".
3. Tap [Delete].