

# Version 4.1

This version does not have new features except maintaining the compatibility with Adarian Money for Windows v5.0.

Version 4.1 has removed the function of beaming data to another handheld, it also removed the function to directly export data to Quicken through the PC Conduit.

As before, the Palm OS version 4.1 can still synchronize data files with Windows version 5.0 through the PC Conduit. But data that relate to investment features, such as buying/selling stocks, cannot be accessed in the Palm OS version.

# Version 4.0

## Views Related

1. The original Summary view has been replaced with the new **Current Status view**, which gives a quick glance of your complete financial status:

Current Status		View
◀ This Month ▶		Options
Item	Amount	
- Net Income	1,106.43	
+ Expense	3,675.00	
Income	4,781.43	
+ Net Worth	57,060.44	
- What's Coming		
6/14 Cell phone	-128.21	
6/16 Cabel TV	-155.00	
+ Over-Budgets		
- Overdrafts		
AMEX	-1,432.12	

- Income/expense/budget summary;
  - Net worth summary;
  - Select account's ending balances;
  - Upcoming and unrealized transactions;
  - Overdue, over-budget, over-limit alerts;
  - And select categories/payees/classes that you want to keep an eye on.
2. The original **Calendar view** has been totally redesigned. It now shows upcoming transactions in the calendar.

Calendar							View
◀ This Month ▶							
S	M	T	W	T	F	S	
27	28	29	30	31	1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	

3. Six new columns are added to the Scheduled Transactions view to show information like payee, auto-processing type, number of payments left, frequency, etc.
4. Two new columns are added to the Transaction Log and Account Register views to show if a transaction is excluded, and its transaction type.
5. A footnote is added to the Categories/Budgets view to show your total budget situation.

## Transaction Related

1. A new transaction attribute is added: **Transaction Type**. In addition to the original 3 built-in types: Withdraw, Deposit, Transfer, users can now define their own transaction types. Check out the [Lists: Transaction Types] menu command.
2. Users can define frequently used transactions as **Templates** so that when entering new transactions, they can choose and apply a pre-defined template quickly.
3. Added a new [Data: Replace] menu command to replace the payees/categories/classes for more than one transactions at a time.
4. Added a new option "Show day names" in the Preferences dialog box to show or hide day names in the Transaction dialog box.

## Lists Related

1. Now you can **close inactive accounts** that are no longer used. When an account is closed, it will be hidden in most of the user interface most of the time, but all its data are still in the database. That is, they don't come in the way while you're using the software, but they are not deleted. When you need to go back and check its information, you still can. See the [Lists: Accounts] dialog box.
2. Similar to closing accounts, you can also close inactive payees. They are just hidden from most of the user interface, but their data are still there. See the [Lists: Payees] dialog box.
3. Similar to closing accounts, you can also close inactive classes. They are just hidden from most of the user interface, but their data are still there. See the [Lists: Classes] dialog box.

4. **Accounts do not have to be sorted alphabetically.** You can sort them any way you want; for example, you can move frequently used accounts to the top of the list. See the [Lists: Accounts] dialog box.

## Data Synchronization

*These new functions are available only when you have the Windows version of Adarian Money.*

1. **Partial Sync** – You can keep the complete database in the PC while carrying only the most recent data in the handheld. This reduces the size of database on the handheld and speeds up some operations. Check out the [File: Data Synchronization: Partial Sync] menu command in the Windows version.
2. **Family Sync** – Allows more than one person, such as family members, to share and sync data together. Check out the [File: Data Synchronization: Family Sync] menu command in the Windows version.

## Plug-Ins for Other Applications

1. A **plug-in for DateBK6** is added so that it shows the information about upcoming transactions in DateBK6's Today screen.
2. A **plug-in for ZLauncher** is added so that it shows the information about upcoming transactions in ZLauncher's main screen.

## Miscellaneous

1. When entering a transaction that involves foreign currencies, current exchange rates are remembered so that when they fluctuate in the future, past information won't be affected.
2. Added a new automatic processing option for scheduled transactions – overdue silently. When it's due, nothing happens, it just becomes overdue without any warning or message.
3. In Auto Backup dialog box, a new option is added so that the user can specify how many back up copies he wants to keep.
4. Improved the "Quit on sleep" option in the Preferences dialog box.

5. Users can now specify a custom date range when defining custom views.
6. Password entry screen has been improved; a full keyboard is made available.
7. Importing of check numbers in QIF and OFX files has been improved.
8. Searching on note text is now case-insensitive.