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2. Launch Quicken.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to annual view.
5. Select some categories.
6. Turn on rollover for any selected categories.
7. Edit the rollover value for any month
8. Turn off the rollover
9. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

1. Go to Planning-> Budget and create a new budget.
2. Go to annual view.
3. Select some categories from Auto & transport.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.
6. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
7. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Open a data file with attachment uploaded to cloud.
4. Go to Edit -> Preferences -> Quicken cloud services
5. Unlink your cloud data.

   Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Open a data file with attachment uploaded to cloud.
4. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
5. Delete your cloud data.
6. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
7. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

1. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

1. Install Quicken QW 2014 build 23.1.2.8
2. Launch Quicken
3. Add any manual checking account
4. Sync the account to cloud
5. Go to register
6. Attach an attachment
7. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
8. Sign out
9. Again sign as a same user
10. Go to register
11. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

1. Install Quicken Q2014 build 23.1.2.9
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to annual view
5. Click on ‘Select categories to budget’ link at the bottom of the budget page
6. Select any category and Click OK.
7. Enter a transaction of $70 for Sep month
8. Enter $5 budget value and apply for all month
9. Turn ON 'rollover only positive value'
10. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

10. Install Quicken Q2014 build 23.1.2.5
11. Launch Quicken.
12. Go to Planning-> Budget and create a new budget.
13. Go to annual view.
14. Select some categories.
15. Turn on rollover for any selected categories.
16. Edit the rollover value for any month
17. Turn off the rollover
18. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

8. Go to Planning-> Budget and create a new budget.
9. Go to annual view.
10. Select some categories from Auto & transport.
11. Go to Tools -> Category List or Press (Ctrl + Shift + C)
12. Go to Options -> Assign Category Groups.
13. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

6. Install Quicken QW 2014 build 23.1.1.17
7. Launch Quicken
8. Open a data file with attachment uploaded to cloud.
9. Go to Edit -> Preferences -> Quicken cloud services
10. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

8. Install Quicken QW 2014 build 23.1.1.17
9. Launch Quicken
10. Open a data file with attachment uploaded to cloud.
11. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
12. Delete your cloud data.
13. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
14. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

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1. Install Quicken Q2014 build 23.1.2.5
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3. Go to Planning-> Budget and create a new budget.
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7. Click on "Select categories to budget" link at the bottom of the budget page

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

2. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

12. Install Quicken QW 2014 build 23.1.2.8
13. Launch Quicken
14. Add any manual checking account
15. Sync the account to cloud
16. Go to register
17. Attach an attachment
18. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
19. Sign out
20. Again sign as a same user
21. Go to register
22. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

11. Install Quicken Q2014 build 23.1.2.9
12. Launch Quicken.
13. Go to Planning-> Budget and create a new budget.
14. Go to annual view
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17. Enter a transaction of $70 for Sep month
18. Enter $5 budget value and apply for all month
19. Turn ON 'rollover only positive value'
20. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

19. Install Quicken Q2014 build 23.1.2.5
20. Launch Quicken.
21. Go to Planning-> Budget and create a new budget.
22. Go to annual view.
23. Select some categories.
24. Turn on rollover for any selected categories.
25. Edit the rollover value for any month
26. Turn off the rollover
27. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

15. Go to Planning-> Budget and create a new budget.
16. Go to annual view.
17. Select some categories from Auto & transport.
18. Go to Tools -> Category List or Press (Ctrl + Shift + C)
19. Go to Options -> Assign Category Groups.
20. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
21. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

11. Install Quicken QW 2014 build 23.1.1.17
12. Launch Quicken
13. Open a data file with attachment uploaded to cloud.
14. Go to Edit -> Preferences -> Quicken cloud services
15. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

15. Install Quicken QW 2014 build 23.1.1.17
16. Launch Quicken
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18. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
19. Delete your cloud data.
20. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
21. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

3. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

23. Install Quicken QW 2014 build 23.1.2.8
24. Launch Quicken
25. Add any manual checking account
26. Sync the account to cloud
27. Go to register
28. Attach an attachment
29. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
30. Sign out
31. Again sign as a same user
32. Go to register
33. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

21. Install Quicken Q2014 build 23.1.2.9
22. Launch Quicken.
23. Go to Planning-> Budget and create a new budget.
24. Go to annual view
25. Click on ‘Select categories to budget’ link at the bottom of the budget page
26. Select any category and Click OK.
27. Enter a transaction of $70 for Sep month
28. Enter $5 budget value and apply for all month
29. Turn ON 'rollover only positive value'
30. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

28. Install Quicken Q2014 build 23.1.2.5
29. Launch Quicken.
30. Go to Planning-> Budget and create a new budget.
31. Go to annual view.
32. Select some categories.
33. Turn on rollover for any selected categories.
34. Edit the rollover value for any month
35. Turn off the rollover
36. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

22. Go to Planning-> Budget and create a new budget.
23. Go to annual view.
24. Select some categories from Auto & transport.
25. Go to Tools -> Category List or Press (Ctrl + Shift + C)
26. Go to Options -> Assign Category Groups.
27. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
28. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

16. Install Quicken QW 2014 build 23.1.1.17
17. Launch Quicken
18. Open a data file with attachment uploaded to cloud.
19. Go to Edit -> Preferences -> Quicken cloud services
20. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

22. Install Quicken QW 2014 build 23.1.1.17
23. Launch Quicken
24. Open a data file with attachment uploaded to cloud.
25. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
26. Delete your cloud data.
27. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
28. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

4. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

34. Install Quicken QW 2014 build 23.1.2.8
35. Launch Quicken
36. Add any manual checking account
37. Sync the account to cloud
38. Go to register
39. Attach an attachment
40. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
41. Sign out
42. Again sign as a same user
43. Go to register
44. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

31. Install Quicken Q2014 build 23.1.2.9
32. Launch Quicken.
33. Go to Planning-> Budget and create a new budget.
34. Go to annual view
35. Click on ‘Select categories to budget’ link at the bottom of the budget page
36. Select any category and Click OK.
37. Enter a transaction of $70 for Sep month
38. Enter $5 budget value and apply for all month
39. Turn ON 'rollover only positive value'
40. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

37. Install Quicken Q2014 build 23.1.2.5
38. Launch Quicken.
39. Go to Planning-> Budget and create a new budget.
40. Go to annual view.
41. Select some categories.
42. Turn on rollover for any selected categories.
43. Edit the rollover value for any month
44. Turn off the rollover
45. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

29. Go to Planning-> Budget and create a new budget.
30. Go to annual view.
31. Select some categories from Auto & transport.
32. Go to Tools -> Category List or Press (Ctrl + Shift + C)
33. Go to Options -> Assign Category Groups.
34. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
35. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

21. Install Quicken QW 2014 build 23.1.1.17
22. Launch Quicken
23. Open a data file with attachment uploaded to cloud.
24. Go to Edit -> Preferences -> Quicken cloud services
25. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

29. Install Quicken QW 2014 build 23.1.1.17
30. Launch Quicken
31. Open a data file with attachment uploaded to cloud.
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33. Delete your cloud data.
34. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
35. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

5. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

45. Install Quicken QW 2014 build 23.1.2.8
46. Launch Quicken
47. Add any manual checking account
48. Sync the account to cloud
49. Go to register
50. Attach an attachment
51. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
52. Sign out
53. Again sign as a same user
54. Go to register
55. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

41. Install Quicken Q2014 build 23.1.2.9
42. Launch Quicken.
43. Go to Planning-> Budget and create a new budget.
44. Go to annual view
45. Click on ‘Select categories to budget’ link at the bottom of the budget page
46. Select any category and Click OK.
47. Enter a transaction of $70 for Sep month
48. Enter $5 budget value and apply for all month
49. Turn ON 'rollover only positive value'
50. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

46. Install Quicken Q2014 build 23.1.2.5
47. Launch Quicken.
48. Go to Planning-> Budget and create a new budget.
49. Go to annual view.
50. Select some categories.
51. Turn on rollover for any selected categories.
52. Edit the rollover value for any month
53. Turn off the rollover
54. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

36. Go to Planning-> Budget and create a new budget.
37. Go to annual view.
38. Select some categories from Auto & transport.
39. Go to Tools -> Category List or Press (Ctrl + Shift + C)
40. Go to Options -> Assign Category Groups.
41. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
42. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

26. Install Quicken QW 2014 build 23.1.1.17
27. Launch Quicken
28. Open a data file with attachment uploaded to cloud.
29. Go to Edit -> Preferences -> Quicken cloud services
30. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

36. Install Quicken QW 2014 build 23.1.1.17
37. Launch Quicken
38. Open a data file with attachment uploaded to cloud.
39. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
40. Delete your cloud data.
41. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
42. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

6. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

56. Install Quicken QW 2014 build 23.1.2.8
57. Launch Quicken
58. Add any manual checking account
59. Sync the account to cloud
60. Go to register
61. Attach an attachment
62. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
63. Sign out
64. Again sign as a same user
65. Go to register
66. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

51. Install Quicken Q2014 build 23.1.2.9
52. Launch Quicken.
53. Go to Planning-> Budget and create a new budget.
54. Go to annual view
55. Click on ‘Select categories to budget’ link at the bottom of the budget page
56. Select any category and Click OK.
57. Enter a transaction of $70 for Sep month
58. Enter $5 budget value and apply for all month
59. Turn ON 'rollover only positive value'
60. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

55. Install Quicken Q2014 build 23.1.2.5
56. Launch Quicken.
57. Go to Planning-> Budget and create a new budget.
58. Go to annual view.
59. Select some categories.
60. Turn on rollover for any selected categories.
61. Edit the rollover value for any month
62. Turn off the rollover
63. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

43. Go to Planning-> Budget and create a new budget.
44. Go to annual view.
45. Select some categories from Auto & transport.
46. Go to Tools -> Category List or Press (Ctrl + Shift + C)
47. Go to Options -> Assign Category Groups.
48. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
49. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

31. Install Quicken QW 2014 build 23.1.1.17
32. Launch Quicken
33. Open a data file with attachment uploaded to cloud.
34. Go to Edit -> Preferences -> Quicken cloud services
35. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

43. Install Quicken QW 2014 build 23.1.1.17
44. Launch Quicken
45. Open a data file with attachment uploaded to cloud.
46. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
47. Delete your cloud data.
48. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
49. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

7. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

67. Install Quicken QW 2014 build 23.1.2.8
68. Launch Quicken
69. Add any manual checking account
70. Sync the account to cloud
71. Go to register
72. Attach an attachment
73. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
74. Sign out
75. Again sign as a same user
76. Go to register
77. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

61. Install Quicken Q2014 build 23.1.2.9
62. Launch Quicken.
63. Go to Planning-> Budget and create a new budget.
64. Go to annual view
65. Click on ‘Select categories to budget’ link at the bottom of the budget page
66. Select any category and Click OK.
67. Enter a transaction of $70 for Sep month
68. Enter $5 budget value and apply for all month
69. Turn ON 'rollover only positive value'
70. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

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7. Maximize the Quicken

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

64. Install Quicken Q2014 build 23.1.2.5
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Actual result: Roll-over edited value is not getting reset when it is turned off.

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For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

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53. Go to Tools -> Category List or Press (Ctrl + Shift + C)
54. Go to Options -> Assign Category Groups.
55. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
56. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

36. Install Quicken QW 2014 build 23.1.1.17
37. Launch Quicken
38. Open a data file with attachment uploaded to cloud.
39. Go to Edit -> Preferences -> Quicken cloud services
40. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

50. Install Quicken QW 2014 build 23.1.1.17
51. Launch Quicken
52. Open a data file with attachment uploaded to cloud.
53. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
54. Delete your cloud data.
55. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
56. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

8. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

78. Install Quicken QW 2014 build 23.1.2.8
79. Launch Quicken
80. Add any manual checking account
81. Sync the account to cloud
82. Go to register
83. Attach an attachment
84. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
85. Sign out
86. Again sign as a same user
87. Go to register
88. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

71. Install Quicken Q2014 build 23.1.2.9
72. Launch Quicken.
73. Go to Planning-> Budget and create a new budget.
74. Go to annual view
75. Click on ‘Select categories to budget’ link at the bottom of the budget page
76. Select any category and Click OK.
77. Enter a transaction of $70 for Sep month
78. Enter $5 budget value and apply for all month
79. Turn ON 'rollover only positive value'
80. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

73. Install Quicken Q2014 build 23.1.2.5
74. Launch Quicken.
75. Go to Planning-> Budget and create a new budget.
76. Go to annual view.
77. Select some categories.
78. Turn on rollover for any selected categories.
79. Edit the rollover value for any month
80. Turn off the rollover
81. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

57. Go to Planning-> Budget and create a new budget.
58. Go to annual view.
59. Select some categories from Auto & transport.
60. Go to Tools -> Category List or Press (Ctrl + Shift + C)
61. Go to Options -> Assign Category Groups.
62. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
63. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

41. Install Quicken QW 2014 build 23.1.1.17
42. Launch Quicken
43. Open a data file with attachment uploaded to cloud.
44. Go to Edit -> Preferences -> Quicken cloud services
45. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

57. Install Quicken QW 2014 build 23.1.1.17
58. Launch Quicken
59. Open a data file with attachment uploaded to cloud.
60. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
61. Delete your cloud data.
62. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
63. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

9. Install Quicken QW 2014 build 23.1.2.7
   2. Launch Quicken.
   3. Add any manual checking account.
   4. Create a Bill/Income reminder
   5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

89. Install Quicken QW 2014 build 23.1.2.8
90. Launch Quicken
91. Add any manual checking account
92. Sync the account to cloud
93. Go to register
94. Attach an attachment
95. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
96. Sign out
97. Again sign as a same user
98. Go to register
99. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

81. Install Quicken Q2014 build 23.1.2.9
82. Launch Quicken.
83. Go to Planning-> Budget and create a new budget.
84. Go to annual view
85. Click on ‘Select categories to budget’ link at the bottom of the budget page
86. Select any category and Click OK.
87. Enter a transaction of $70 for Sep month
88. Enter $5 budget value and apply for all month
89. Turn ON 'rollover only positive value'
90. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

82. Install Quicken Q2014 build 23.1.2.5
83. Launch Quicken.
84. Go to Planning-> Budget and create a new budget.
85. Go to annual view.
86. Select some categories.
87. Turn on rollover for any selected categories.
88. Edit the rollover value for any month
89. Turn off the rollover
90. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

64. Go to Planning-> Budget and create a new budget.
65. Go to annual view.
66. Select some categories from Auto & transport.
67. Go to Tools -> Category List or Press (Ctrl + Shift + C)
68. Go to Options -> Assign Category Groups.
69. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
70. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

46. Install Quicken QW 2014 build 23.1.1.17
47. Launch Quicken
48. Open a data file with attachment uploaded to cloud.
49. Go to Edit -> Preferences -> Quicken cloud services
50. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

64. Install Quicken QW 2014 build 23.1.1.17
65. Launch Quicken
66. Open a data file with attachment uploaded to cloud.
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68. Delete your cloud data.
69. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
70. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

10. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

100. Install Quicken QW 2014 build 23.1.2.8
101. Launch Quicken
102. Add any manual checking account
103. Sync the account to cloud
104. Go to register
105. Attach an attachment
106. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
107. Sign out
108. Again sign as a same user
109. Go to register
110. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

91. Install Quicken Q2014 build 23.1.2.9
92. Launch Quicken.
93. Go to Planning-> Budget and create a new budget.
94. Go to annual view
95. Click on ‘Select categories to budget’ link at the bottom of the budget page
96. Select any category and Click OK.
97. Enter a transaction of $70 for Sep month
98. Enter $5 budget value and apply for all month
99. Turn ON 'rollover only positive value'
100. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

91. Install Quicken Q2014 build 23.1.2.5
92. Launch Quicken.
93. Go to Planning-> Budget and create a new budget.
94. Go to annual view.
95. Select some categories.
96. Turn on rollover for any selected categories.
97. Edit the rollover value for any month
98. Turn off the rollover
99. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

71. Go to Planning-> Budget and create a new budget.
72. Go to annual view.
73. Select some categories from Auto & transport.
74. Go to Tools -> Category List or Press (Ctrl + Shift + C)
75. Go to Options -> Assign Category Groups.
76. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
77. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

51. Install Quicken QW 2014 build 23.1.1.17
52. Launch Quicken
53. Open a data file with attachment uploaded to cloud.
54. Go to Edit -> Preferences -> Quicken cloud services
55. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

71. Install Quicken QW 2014 build 23.1.1.17
72. Launch Quicken
73. Open a data file with attachment uploaded to cloud.
74. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
75. Delete your cloud data.
76. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
77. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

11. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

111. Install Quicken QW 2014 build 23.1.2.8
112. Launch Quicken
113. Add any manual checking account
114. Sync the account to cloud
115. Go to register
116. Attach an attachment
117. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
118. Sign out
119. Again sign as a same user
120. Go to register
121. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

101. Install Quicken Q2014 build 23.1.2.9
102. Launch Quicken.
103. Go to Planning-> Budget and create a new budget.
104. Go to annual view
105. Click on ‘Select categories to budget’ link at the bottom of the budget page
106. Select any category and Click OK.
107. Enter a transaction of $70 for Sep month
108. Enter $5 budget value and apply for all month
109. Turn ON 'rollover only positive value'
110. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

100. Install Quicken Q2014 build 23.1.2.5
101. Launch Quicken.
102. Go to Planning-> Budget and create a new budget.
103. Go to annual view.
104. Select some categories.
105. Turn on rollover for any selected categories.
106. Edit the rollover value for any month
107. Turn off the rollover
108. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

78. Go to Planning-> Budget and create a new budget.
79. Go to annual view.
80. Select some categories from Auto & transport.
81. Go to Tools -> Category List or Press (Ctrl + Shift + C)
82. Go to Options -> Assign Category Groups.
83. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
84. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

56. Install Quicken QW 2014 build 23.1.1.17
57. Launch Quicken
58. Open a data file with attachment uploaded to cloud.
59. Go to Edit -> Preferences -> Quicken cloud services
60. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

78. Install Quicken QW 2014 build 23.1.1.17
79. Launch Quicken
80. Open a data file with attachment uploaded to cloud.
81. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
82. Delete your cloud data.
83. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
84. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

12. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

122. Install Quicken QW 2014 build 23.1.2.8
123. Launch Quicken
124. Add any manual checking account
125. Sync the account to cloud
126. Go to register
127. Attach an attachment
128. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
129. Sign out
130. Again sign as a same user
131. Go to register
132. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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118. Enter $5 budget value and apply for all month
119. Turn ON 'rollover only positive value'
120. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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3. Resize the Quicken window

4. Minimize the Quicken

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

109. Install Quicken Q2014 build 23.1.2.5
110. Launch Quicken.
111. Go to Planning-> Budget and create a new budget.
112. Go to annual view.
113. Select some categories.
114. Turn on rollover for any selected categories.
115. Edit the rollover value for any month
116. Turn off the rollover
117. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

85. Go to Planning-> Budget and create a new budget.
86. Go to annual view.
87. Select some categories from Auto & transport.
88. Go to Tools -> Category List or Press (Ctrl + Shift + C)
89. Go to Options -> Assign Category Groups.
90. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
91. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

61. Install Quicken QW 2014 build 23.1.1.17
62. Launch Quicken
63. Open a data file with attachment uploaded to cloud.
64. Go to Edit -> Preferences -> Quicken cloud services
65. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

85. Install Quicken QW 2014 build 23.1.1.17
86. Launch Quicken
87. Open a data file with attachment uploaded to cloud.
88. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
89. Delete your cloud data.
90. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
91. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

13. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

133. Install Quicken QW 2014 build 23.1.2.8
134. Launch Quicken
135. Add any manual checking account
136. Sync the account to cloud
137. Go to register
138. Attach an attachment
139. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
140. Sign out
141. Again sign as a same user
142. Go to register
143. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

121. Install Quicken Q2014 build 23.1.2.9
122. Launch Quicken.
123. Go to Planning-> Budget and create a new budget.
124. Go to annual view
125. Click on ‘Select categories to budget’ link at the bottom of the budget page
126. Select any category and Click OK.
127. Enter a transaction of $70 for Sep month
128. Enter $5 budget value and apply for all month
129. Turn ON 'rollover only positive value'
130. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

118. Install Quicken Q2014 build 23.1.2.5
119. Launch Quicken.
120. Go to Planning-> Budget and create a new budget.
121. Go to annual view.
122. Select some categories.
123. Turn on rollover for any selected categories.
124. Edit the rollover value for any month
125. Turn off the rollover
126. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

92. Go to Planning-> Budget and create a new budget.
93. Go to annual view.
94. Select some categories from Auto & transport.
95. Go to Tools -> Category List or Press (Ctrl + Shift + C)
96. Go to Options -> Assign Category Groups.
97. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
98. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

66. Install Quicken QW 2014 build 23.1.1.17
67. Launch Quicken
68. Open a data file with attachment uploaded to cloud.
69. Go to Edit -> Preferences -> Quicken cloud services
70. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

92. Install Quicken QW 2014 build 23.1.1.17
93. Launch Quicken
94. Open a data file with attachment uploaded to cloud.
95. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
96. Delete your cloud data.
97. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
98. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

14. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

144. Install Quicken QW 2014 build 23.1.2.8
145. Launch Quicken
146. Add any manual checking account
147. Sync the account to cloud
148. Go to register
149. Attach an attachment
150. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
151. Sign out
152. Again sign as a same user
153. Go to register
154. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

131. Install Quicken Q2014 build 23.1.2.9
132. Launch Quicken.
133. Go to Planning-> Budget and create a new budget.
134. Go to annual view
135. Click on ‘Select categories to budget’ link at the bottom of the budget page
136. Select any category and Click OK.
137. Enter a transaction of $70 for Sep month
138. Enter $5 budget value and apply for all month
139. Turn ON 'rollover only positive value'
140. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

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5. Right-click on Quicken icon in taskbar and close Quicken

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

127. Install Quicken Q2014 build 23.1.2.5
128. Launch Quicken.
129. Go to Planning-> Budget and create a new budget.
130. Go to annual view.
131. Select some categories.
132. Turn on rollover for any selected categories.
133. Edit the rollover value for any month
134. Turn off the rollover
135. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

99. Go to Planning-> Budget and create a new budget.
100. Go to annual view.
101. Select some categories from Auto & transport.
102. Go to Tools -> Category List or Press (Ctrl + Shift + C)
103. Go to Options -> Assign Category Groups.
104. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
105. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

71. Install Quicken QW 2014 build 23.1.1.17
72. Launch Quicken
73. Open a data file with attachment uploaded to cloud.
74. Go to Edit -> Preferences -> Quicken cloud services
75. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

99. Install Quicken QW 2014 build 23.1.1.17
100. Launch Quicken
101. Open a data file with attachment uploaded to cloud.
102. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
103. Delete your cloud data.
104. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
105. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

15. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

155. Install Quicken QW 2014 build 23.1.2.8
156. Launch Quicken
157. Add any manual checking account
158. Sync the account to cloud
159. Go to register
160. Attach an attachment
161. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
162. Sign out
163. Again sign as a same user
164. Go to register
165. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

141. Install Quicken Q2014 build 23.1.2.9
142. Launch Quicken.
143. Go to Planning-> Budget and create a new budget.
144. Go to annual view
145. Click on ‘Select categories to budget’ link at the bottom of the budget page
146. Select any category and Click OK.
147. Enter a transaction of $70 for Sep month
148. Enter $5 budget value and apply for all month
149. Turn ON 'rollover only positive value'
150. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

136. Install Quicken Q2014 build 23.1.2.5
137. Launch Quicken.
138. Go to Planning-> Budget and create a new budget.
139. Go to annual view.
140. Select some categories.
141. Turn on rollover for any selected categories.
142. Edit the rollover value for any month
143. Turn off the rollover
144. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

106. Go to Planning-> Budget and create a new budget.
107. Go to annual view.
108. Select some categories from Auto & transport.
109. Go to Tools -> Category List or Press (Ctrl + Shift + C)
110. Go to Options -> Assign Category Groups.
111. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
112. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

76. Install Quicken QW 2014 build 23.1.1.17
77. Launch Quicken
78. Open a data file with attachment uploaded to cloud.
79. Go to Edit -> Preferences -> Quicken cloud services
80. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

106. Install Quicken QW 2014 build 23.1.1.17
107. Launch Quicken
108. Open a data file with attachment uploaded to cloud.
109. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
110. Delete your cloud data.
111. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
112. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

16. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

166. Install Quicken QW 2014 build 23.1.2.8
167. Launch Quicken
168. Add any manual checking account
169. Sync the account to cloud
170. Go to register
171. Attach an attachment
172. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
173. Sign out
174. Again sign as a same user
175. Go to register
176. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

151. Install Quicken Q2014 build 23.1.2.9
152. Launch Quicken.
153. Go to Planning-> Budget and create a new budget.
154. Go to annual view
155. Click on ‘Select categories to budget’ link at the bottom of the budget page
156. Select any category and Click OK.
157. Enter a transaction of $70 for Sep month
158. Enter $5 budget value and apply for all month
159. Turn ON 'rollover only positive value'
160. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

145. Install Quicken Q2014 build 23.1.2.5
146. Launch Quicken.
147. Go to Planning-> Budget and create a new budget.
148. Go to annual view.
149. Select some categories.
150. Turn on rollover for any selected categories.
151. Edit the rollover value for any month
152. Turn off the rollover
153. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

113. Go to Planning-> Budget and create a new budget.
114. Go to annual view.
115. Select some categories from Auto & transport.
116. Go to Tools -> Category List or Press (Ctrl + Shift + C)
117. Go to Options -> Assign Category Groups.
118. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
119. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

81. Install Quicken QW 2014 build 23.1.1.17
82. Launch Quicken
83. Open a data file with attachment uploaded to cloud.
84. Go to Edit -> Preferences -> Quicken cloud services
85. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

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117. Delete your cloud data.
118. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
119. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

17. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

177. Install Quicken QW 2014 build 23.1.2.8
178. Launch Quicken
179. Add any manual checking account
180. Sync the account to cloud
181. Go to register
182. Attach an attachment
183. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
184. Sign out
185. Again sign as a same user
186. Go to register
187. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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162. Launch Quicken.
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166. Select any category and Click OK.
167. Enter a transaction of $70 for Sep month
168. Enter $5 budget value and apply for all month
169. Turn ON 'rollover only positive value'
170. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

154. Install Quicken Q2014 build 23.1.2.5
155. Launch Quicken.
156. Go to Planning-> Budget and create a new budget.
157. Go to annual view.
158. Select some categories.
159. Turn on rollover for any selected categories.
160. Edit the rollover value for any month
161. Turn off the rollover
162. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

120. Go to Planning-> Budget and create a new budget.
121. Go to annual view.
122. Select some categories from Auto & transport.
123. Go to Tools -> Category List or Press (Ctrl + Shift + C)
124. Go to Options -> Assign Category Groups.
125. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
126. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

86. Install Quicken QW 2014 build 23.1.1.17
87. Launch Quicken
88. Open a data file with attachment uploaded to cloud.
89. Go to Edit -> Preferences -> Quicken cloud services
90. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

120. Install Quicken QW 2014 build 23.1.1.17
121. Launch Quicken
122. Open a data file with attachment uploaded to cloud.
123. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
124. Delete your cloud data.
125. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
126. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

18. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

188. Install Quicken QW 2014 build 23.1.2.8
189. Launch Quicken
190. Add any manual checking account
191. Sync the account to cloud
192. Go to register
193. Attach an attachment
194. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
195. Sign out
196. Again sign as a same user
197. Go to register
198. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

171. Install Quicken Q2014 build 23.1.2.9
172. Launch Quicken.
173. Go to Planning-> Budget and create a new budget.
174. Go to annual view
175. Click on ‘Select categories to budget’ link at the bottom of the budget page
176. Select any category and Click OK.
177. Enter a transaction of $70 for Sep month
178. Enter $5 budget value and apply for all month
179. Turn ON 'rollover only positive value'
180. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

163. Install Quicken Q2014 build 23.1.2.5
164. Launch Quicken.
165. Go to Planning-> Budget and create a new budget.
166. Go to annual view.
167. Select some categories.
168. Turn on rollover for any selected categories.
169. Edit the rollover value for any month
170. Turn off the rollover
171. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

127. Go to Planning-> Budget and create a new budget.
128. Go to annual view.
129. Select some categories from Auto & transport.
130. Go to Tools -> Category List or Press (Ctrl + Shift + C)
131. Go to Options -> Assign Category Groups.
132. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
133. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17
2. Launch Quicken
3. Press [Alt]+[I], then [T] then [F]
4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

91. Install Quicken QW 2014 build 23.1.1.17
92. Launch Quicken
93. Open a data file with attachment uploaded to cloud.
94. Go to Edit -> Preferences -> Quicken cloud services
95. Unlink your cloud data.

    Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

127. Install Quicken QW 2014 build 23.1.1.17
128. Launch Quicken
129. Open a data file with attachment uploaded to cloud.
130. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
131. Delete your cloud data.
132. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
133. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

19. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

199. Install Quicken QW 2014 build 23.1.2.8
200. Launch Quicken
201. Add any manual checking account
202. Sync the account to cloud
203. Go to register
204. Attach an attachment
205. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
206. Sign out
207. Again sign as a same user
208. Go to register
209. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

181. Install Quicken Q2014 build 23.1.2.9
182. Launch Quicken.
183. Go to Planning-> Budget and create a new budget.
184. Go to annual view
185. Click on ‘Select categories to budget’ link at the bottom of the budget page
186. Select any category and Click OK.
187. Enter a transaction of $70 for Sep month
188. Enter $5 budget value and apply for all month
189. Turn ON 'rollover only positive value'
190. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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3. Resize the Quicken window

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

172. Install Quicken Q2014 build 23.1.2.5
173. Launch Quicken.
174. Go to Planning-> Budget and create a new budget.
175. Go to annual view.
176. Select some categories.
177. Turn on rollover for any selected categories.
178. Edit the rollover value for any month
179. Turn off the rollover
180. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

134. Go to Planning-> Budget and create a new budget.
135. Go to annual view.
136. Select some categories from Auto & transport.
137. Go to Tools -> Category List or Press (Ctrl + Shift + C)
138. Go to Options -> Assign Category Groups.
139. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
140. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

96. Install Quicken QW 2014 build 23.1.1.17
97. Launch Quicken
98. Open a data file with attachment uploaded to cloud.
99. Go to Edit -> Preferences -> Quicken cloud services
100. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

134. Install Quicken QW 2014 build 23.1.1.17
135. Launch Quicken
136. Open a data file with attachment uploaded to cloud.
137. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
138. Delete your cloud data.
139. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
140. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

20. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

210. Install Quicken QW 2014 build 23.1.2.8
211. Launch Quicken
212. Add any manual checking account
213. Sync the account to cloud
214. Go to register
215. Attach an attachment
216. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
217. Sign out
218. Again sign as a same user
219. Go to register
220. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

191. Install Quicken Q2014 build 23.1.2.9
192. Launch Quicken.
193. Go to Planning-> Budget and create a new budget.
194. Go to annual view
195. Click on ‘Select categories to budget’ link at the bottom of the budget page
196. Select any category and Click OK.
197. Enter a transaction of $70 for Sep month
198. Enter $5 budget value and apply for all month
199. Turn ON 'rollover only positive value'
200. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

181. Install Quicken Q2014 build 23.1.2.5
182. Launch Quicken.
183. Go to Planning-> Budget and create a new budget.
184. Go to annual view.
185. Select some categories.
186. Turn on rollover for any selected categories.
187. Edit the rollover value for any month
188. Turn off the rollover
189. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

141. Go to Planning-> Budget and create a new budget.
142. Go to annual view.
143. Select some categories from Auto & transport.
144. Go to Tools -> Category List or Press (Ctrl + Shift + C)
145. Go to Options -> Assign Category Groups.
146. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
147. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

101. Install Quicken QW 2014 build 23.1.1.17
102. Launch Quicken
103. Open a data file with attachment uploaded to cloud.
104. Go to Edit -> Preferences -> Quicken cloud services
105. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

141. Install Quicken QW 2014 build 23.1.1.17
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143. Open a data file with attachment uploaded to cloud.
144. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
145. Delete your cloud data.
146. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
147. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
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3. Go to Planning-> Budget and create a new budget.
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

21. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

221. Install Quicken QW 2014 build 23.1.2.8
222. Launch Quicken
223. Add any manual checking account
224. Sync the account to cloud
225. Go to register
226. Attach an attachment
227. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
228. Sign out
229. Again sign as a same user
230. Go to register
231. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

201. Install Quicken Q2014 build 23.1.2.9
202. Launch Quicken.
203. Go to Planning-> Budget and create a new budget.
204. Go to annual view
205. Click on ‘Select categories to budget’ link at the bottom of the budget page
206. Select any category and Click OK.
207. Enter a transaction of $70 for Sep month
208. Enter $5 budget value and apply for all month
209. Turn ON 'rollover only positive value'
210. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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190. Install Quicken Q2014 build 23.1.2.5
191. Launch Quicken.
192. Go to Planning-> Budget and create a new budget.
193. Go to annual view.
194. Select some categories.
195. Turn on rollover for any selected categories.
196. Edit the rollover value for any month
197. Turn off the rollover
198. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

106. Install Quicken QW 2014 build 23.1.1.17
107. Launch Quicken
108. Open a data file with attachment uploaded to cloud.
109. Go to Edit -> Preferences -> Quicken cloud services
110. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

148. Install Quicken QW 2014 build 23.1.1.17
149. Launch Quicken
150. Open a data file with attachment uploaded to cloud.
151. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
152. Delete your cloud data.
153. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
154. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

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Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

22. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

232. Install Quicken QW 2014 build 23.1.2.8
233. Launch Quicken
234. Add any manual checking account
235. Sync the account to cloud
236. Go to register
237. Attach an attachment
238. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
239. Sign out
240. Again sign as a same user
241. Go to register
242. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

211. Install Quicken Q2014 build 23.1.2.9
212. Launch Quicken.
213. Go to Planning-> Budget and create a new budget.
214. Go to annual view
215. Click on ‘Select categories to budget’ link at the bottom of the budget page
216. Select any category and Click OK.
217. Enter a transaction of $70 for Sep month
218. Enter $5 budget value and apply for all month
219. Turn ON 'rollover only positive value'
220. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

199. Install Quicken Q2014 build 23.1.2.5
200. Launch Quicken.
201. Go to Planning-> Budget and create a new budget.
202. Go to annual view.
203. Select some categories.
204. Turn on rollover for any selected categories.
205. Edit the rollover value for any month
206. Turn off the rollover
207. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

155. Go to Planning-> Budget and create a new budget.
156. Go to annual view.
157. Select some categories from Auto & transport.
158. Go to Tools -> Category List or Press (Ctrl + Shift + C)
159. Go to Options -> Assign Category Groups.
160. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
161. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

111. Install Quicken QW 2014 build 23.1.1.17
112. Launch Quicken
113. Open a data file with attachment uploaded to cloud.
114. Go to Edit -> Preferences -> Quicken cloud services
115. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

155. Install Quicken QW 2014 build 23.1.1.17
156. Launch Quicken
157. Open a data file with attachment uploaded to cloud.
158. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
159. Delete your cloud data.
160. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
161. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

23. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

243. Install Quicken QW 2014 build 23.1.2.8
244. Launch Quicken
245. Add any manual checking account
246. Sync the account to cloud
247. Go to register
248. Attach an attachment
249. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
250. Sign out
251. Again sign as a same user
252. Go to register
253. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

221. Install Quicken Q2014 build 23.1.2.9
222. Launch Quicken.
223. Go to Planning-> Budget and create a new budget.
224. Go to annual view
225. Click on ‘Select categories to budget’ link at the bottom of the budget page
226. Select any category and Click OK.
227. Enter a transaction of $70 for Sep month
228. Enter $5 budget value and apply for all month
229. Turn ON 'rollover only positive value'
230. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

208. Install Quicken Q2014 build 23.1.2.5
209. Launch Quicken.
210. Go to Planning-> Budget and create a new budget.
211. Go to annual view.
212. Select some categories.
213. Turn on rollover for any selected categories.
214. Edit the rollover value for any month
215. Turn off the rollover
216. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

162. Go to Planning-> Budget and create a new budget.
163. Go to annual view.
164. Select some categories from Auto & transport.
165. Go to Tools -> Category List or Press (Ctrl + Shift + C)
166. Go to Options -> Assign Category Groups.
167. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
168. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

116. Install Quicken QW 2014 build 23.1.1.17
117. Launch Quicken
118. Open a data file with attachment uploaded to cloud.
119. Go to Edit -> Preferences -> Quicken cloud services
120. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

162. Install Quicken QW 2014 build 23.1.1.17
163. Launch Quicken
164. Open a data file with attachment uploaded to cloud.
165. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
166. Delete your cloud data.
167. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
168. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

24. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

254. Install Quicken QW 2014 build 23.1.2.8
255. Launch Quicken
256. Add any manual checking account
257. Sync the account to cloud
258. Go to register
259. Attach an attachment
260. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
261. Sign out
262. Again sign as a same user
263. Go to register
264. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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232. Launch Quicken.
233. Go to Planning-> Budget and create a new budget.
234. Go to annual view
235. Click on ‘Select categories to budget’ link at the bottom of the budget page
236. Select any category and Click OK.
237. Enter a transaction of $70 for Sep month
238. Enter $5 budget value and apply for all month
239. Turn ON 'rollover only positive value'
240. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

217. Install Quicken Q2014 build 23.1.2.5
218. Launch Quicken.
219. Go to Planning-> Budget and create a new budget.
220. Go to annual view.
221. Select some categories.
222. Turn on rollover for any selected categories.
223. Edit the rollover value for any month
224. Turn off the rollover
225. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

169. Go to Planning-> Budget and create a new budget.
170. Go to annual view.
171. Select some categories from Auto & transport.
172. Go to Tools -> Category List or Press (Ctrl + Shift + C)
173. Go to Options -> Assign Category Groups.
174. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
175. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

121. Install Quicken QW 2014 build 23.1.1.17
122. Launch Quicken
123. Open a data file with attachment uploaded to cloud.
124. Go to Edit -> Preferences -> Quicken cloud services
125. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

169. Install Quicken QW 2014 build 23.1.1.17
170. Launch Quicken
171. Open a data file with attachment uploaded to cloud.
172. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
173. Delete your cloud data.
174. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
175. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

25. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

265. Install Quicken QW 2014 build 23.1.2.8
266. Launch Quicken
267. Add any manual checking account
268. Sync the account to cloud
269. Go to register
270. Attach an attachment
271. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
272. Sign out
273. Again sign as a same user
274. Go to register
275. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

241. Install Quicken Q2014 build 23.1.2.9
242. Launch Quicken.
243. Go to Planning-> Budget and create a new budget.
244. Go to annual view
245. Click on ‘Select categories to budget’ link at the bottom of the budget page
246. Select any category and Click OK.
247. Enter a transaction of $70 for Sep month
248. Enter $5 budget value and apply for all month
249. Turn ON 'rollover only positive value'
250. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

226. Install Quicken Q2014 build 23.1.2.5
227. Launch Quicken.
228. Go to Planning-> Budget and create a new budget.
229. Go to annual view.
230. Select some categories.
231. Turn on rollover for any selected categories.
232. Edit the rollover value for any month
233. Turn off the rollover
234. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

176. Go to Planning-> Budget and create a new budget.
177. Go to annual view.
178. Select some categories from Auto & transport.
179. Go to Tools -> Category List or Press (Ctrl + Shift + C)
180. Go to Options -> Assign Category Groups.
181. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
182. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

126. Install Quicken QW 2014 build 23.1.1.17
127. Launch Quicken
128. Open a data file with attachment uploaded to cloud.
129. Go to Edit -> Preferences -> Quicken cloud services
130. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

176. Install Quicken QW 2014 build 23.1.1.17
177. Launch Quicken
178. Open a data file with attachment uploaded to cloud.
179. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
180. Delete your cloud data.
181. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
182. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

26. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

276. Install Quicken QW 2014 build 23.1.2.8
277. Launch Quicken
278. Add any manual checking account
279. Sync the account to cloud
280. Go to register
281. Attach an attachment
282. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
283. Sign out
284. Again sign as a same user
285. Go to register
286. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

251. Install Quicken Q2014 build 23.1.2.9
252. Launch Quicken.
253. Go to Planning-> Budget and create a new budget.
254. Go to annual view
255. Click on ‘Select categories to budget’ link at the bottom of the budget page
256. Select any category and Click OK.
257. Enter a transaction of $70 for Sep month
258. Enter $5 budget value and apply for all month
259. Turn ON 'rollover only positive value'
260. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

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7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

235. Install Quicken Q2014 build 23.1.2.5
236. Launch Quicken.
237. Go to Planning-> Budget and create a new budget.
238. Go to annual view.
239. Select some categories.
240. Turn on rollover for any selected categories.
241. Edit the rollover value for any month
242. Turn off the rollover
243. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

183. Go to Planning-> Budget and create a new budget.
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187. Go to Options -> Assign Category Groups.
188. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
189. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

131. Install Quicken QW 2014 build 23.1.1.17
132. Launch Quicken
133. Open a data file with attachment uploaded to cloud.
134. Go to Edit -> Preferences -> Quicken cloud services
135. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

183. Install Quicken QW 2014 build 23.1.1.17
184. Launch Quicken
185. Open a data file with attachment uploaded to cloud.
186. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
187. Delete your cloud data.
188. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
189. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

27. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

287. Install Quicken QW 2014 build 23.1.2.8
288. Launch Quicken
289. Add any manual checking account
290. Sync the account to cloud
291. Go to register
292. Attach an attachment
293. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
294. Sign out
295. Again sign as a same user
296. Go to register
297. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

261. Install Quicken Q2014 build 23.1.2.9
262. Launch Quicken.
263. Go to Planning-> Budget and create a new budget.
264. Go to annual view
265. Click on ‘Select categories to budget’ link at the bottom of the budget page
266. Select any category and Click OK.
267. Enter a transaction of $70 for Sep month
268. Enter $5 budget value and apply for all month
269. Turn ON 'rollover only positive value'
270. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

244. Install Quicken Q2014 build 23.1.2.5
245. Launch Quicken.
246. Go to Planning-> Budget and create a new budget.
247. Go to annual view.
248. Select some categories.
249. Turn on rollover for any selected categories.
250. Edit the rollover value for any month
251. Turn off the rollover
252. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

190. Go to Planning-> Budget and create a new budget.
191. Go to annual view.
192. Select some categories from Auto & transport.
193. Go to Tools -> Category List or Press (Ctrl + Shift + C)
194. Go to Options -> Assign Category Groups.
195. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
196. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

136. Install Quicken QW 2014 build 23.1.1.17
137. Launch Quicken
138. Open a data file with attachment uploaded to cloud.
139. Go to Edit -> Preferences -> Quicken cloud services
140. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

190. Install Quicken QW 2014 build 23.1.1.17
191. Launch Quicken
192. Open a data file with attachment uploaded to cloud.
193. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
194. Delete your cloud data.
195. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
196. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

28. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

298. Install Quicken QW 2014 build 23.1.2.8
299. Launch Quicken
300. Add any manual checking account
301. Sync the account to cloud
302. Go to register
303. Attach an attachment
304. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
305. Sign out
306. Again sign as a same user
307. Go to register
308. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

271. Install Quicken Q2014 build 23.1.2.9
272. Launch Quicken.
273. Go to Planning-> Budget and create a new budget.
274. Go to annual view
275. Click on ‘Select categories to budget’ link at the bottom of the budget page
276. Select any category and Click OK.
277. Enter a transaction of $70 for Sep month
278. Enter $5 budget value and apply for all month
279. Turn ON 'rollover only positive value'
280. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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253. Install Quicken Q2014 build 23.1.2.5
254. Launch Quicken.
255. Go to Planning-> Budget and create a new budget.
256. Go to annual view.
257. Select some categories.
258. Turn on rollover for any selected categories.
259. Edit the rollover value for any month
260. Turn off the rollover
261. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

197. Go to Planning-> Budget and create a new budget.
198. Go to annual view.
199. Select some categories from Auto & transport.
200. Go to Tools -> Category List or Press (Ctrl + Shift + C)
201. Go to Options -> Assign Category Groups.
202. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
203. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

141. Install Quicken QW 2014 build 23.1.1.17
142. Launch Quicken
143. Open a data file with attachment uploaded to cloud.
144. Go to Edit -> Preferences -> Quicken cloud services
145. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

197. Install Quicken QW 2014 build 23.1.1.17
198. Launch Quicken
199. Open a data file with attachment uploaded to cloud.
200. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
201. Delete your cloud data.
202. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
203. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

29. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

309. Install Quicken QW 2014 build 23.1.2.8
310. Launch Quicken
311. Add any manual checking account
312. Sync the account to cloud
313. Go to register
314. Attach an attachment
315. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
316. Sign out
317. Again sign as a same user
318. Go to register
319. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

281. Install Quicken Q2014 build 23.1.2.9
282. Launch Quicken.
283. Go to Planning-> Budget and create a new budget.
284. Go to annual view
285. Click on ‘Select categories to budget’ link at the bottom of the budget page
286. Select any category and Click OK.
287. Enter a transaction of $70 for Sep month
288. Enter $5 budget value and apply for all month
289. Turn ON 'rollover only positive value'
290. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

262. Install Quicken Q2014 build 23.1.2.5
263. Launch Quicken.
264. Go to Planning-> Budget and create a new budget.
265. Go to annual view.
266. Select some categories.
267. Turn on rollover for any selected categories.
268. Edit the rollover value for any month
269. Turn off the rollover
270. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

204. Go to Planning-> Budget and create a new budget.
205. Go to annual view.
206. Select some categories from Auto & transport.
207. Go to Tools -> Category List or Press (Ctrl + Shift + C)
208. Go to Options -> Assign Category Groups.
209. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
210. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

146. Install Quicken QW 2014 build 23.1.1.17
147. Launch Quicken
148. Open a data file with attachment uploaded to cloud.
149. Go to Edit -> Preferences -> Quicken cloud services
150. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

204. Install Quicken QW 2014 build 23.1.1.17
205. Launch Quicken
206. Open a data file with attachment uploaded to cloud.
207. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
208. Delete your cloud data.
209. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
210. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

30. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

320. Install Quicken QW 2014 build 23.1.2.8
321. Launch Quicken
322. Add any manual checking account
323. Sync the account to cloud
324. Go to register
325. Attach an attachment
326. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
327. Sign out
328. Again sign as a same user
329. Go to register
330. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

291. Install Quicken Q2014 build 23.1.2.9
292. Launch Quicken.
293. Go to Planning-> Budget and create a new budget.
294. Go to annual view
295. Click on ‘Select categories to budget’ link at the bottom of the budget page
296. Select any category and Click OK.
297. Enter a transaction of $70 for Sep month
298. Enter $5 budget value and apply for all month
299. Turn ON 'rollover only positive value'
300. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

271. Install Quicken Q2014 build 23.1.2.5
272. Launch Quicken.
273. Go to Planning-> Budget and create a new budget.
274. Go to annual view.
275. Select some categories.
276. Turn on rollover for any selected categories.
277. Edit the rollover value for any month
278. Turn off the rollover
279. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

211. Go to Planning-> Budget and create a new budget.
212. Go to annual view.
213. Select some categories from Auto & transport.
214. Go to Tools -> Category List or Press (Ctrl + Shift + C)
215. Go to Options -> Assign Category Groups.
216. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
217. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

151. Install Quicken QW 2014 build 23.1.1.17
152. Launch Quicken
153. Open a data file with attachment uploaded to cloud.
154. Go to Edit -> Preferences -> Quicken cloud services
155. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

211. Install Quicken QW 2014 build 23.1.1.17
212. Launch Quicken
213. Open a data file with attachment uploaded to cloud.
214. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
215. Delete your cloud data.
216. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
217. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

31. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

331. Install Quicken QW 2014 build 23.1.2.8
332. Launch Quicken
333. Add any manual checking account
334. Sync the account to cloud
335. Go to register
336. Attach an attachment
337. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
338. Sign out
339. Again sign as a same user
340. Go to register
341. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

301. Install Quicken Q2014 build 23.1.2.9
302. Launch Quicken.
303. Go to Planning-> Budget and create a new budget.
304. Go to annual view
305. Click on ‘Select categories to budget’ link at the bottom of the budget page
306. Select any category and Click OK.
307. Enter a transaction of $70 for Sep month
308. Enter $5 budget value and apply for all month
309. Turn ON 'rollover only positive value'
310. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

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3. Resize the Quicken window

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6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

280. Install Quicken Q2014 build 23.1.2.5
281. Launch Quicken.
282. Go to Planning-> Budget and create a new budget.
283. Go to annual view.
284. Select some categories.
285. Turn on rollover for any selected categories.
286. Edit the rollover value for any month
287. Turn off the rollover
288. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

218. Go to Planning-> Budget and create a new budget.
219. Go to annual view.
220. Select some categories from Auto & transport.
221. Go to Tools -> Category List or Press (Ctrl + Shift + C)
222. Go to Options -> Assign Category Groups.
223. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
224. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

156. Install Quicken QW 2014 build 23.1.1.17
157. Launch Quicken
158. Open a data file with attachment uploaded to cloud.
159. Go to Edit -> Preferences -> Quicken cloud services
160. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

218. Install Quicken QW 2014 build 23.1.1.17
219. Launch Quicken
220. Open a data file with attachment uploaded to cloud.
221. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
222. Delete your cloud data.
223. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
224. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

32. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

342. Install Quicken QW 2014 build 23.1.2.8
343. Launch Quicken
344. Add any manual checking account
345. Sync the account to cloud
346. Go to register
347. Attach an attachment
348. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
349. Sign out
350. Again sign as a same user
351. Go to register
352. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

311. Install Quicken Q2014 build 23.1.2.9
312. Launch Quicken.
313. Go to Planning-> Budget and create a new budget.
314. Go to annual view
315. Click on ‘Select categories to budget’ link at the bottom of the budget page
316. Select any category and Click OK.
317. Enter a transaction of $70 for Sep month
318. Enter $5 budget value and apply for all month
319. Turn ON 'rollover only positive value'
320. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

289. Install Quicken Q2014 build 23.1.2.5
290. Launch Quicken.
291. Go to Planning-> Budget and create a new budget.
292. Go to annual view.
293. Select some categories.
294. Turn on rollover for any selected categories.
295. Edit the rollover value for any month
296. Turn off the rollover
297. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

225. Go to Planning-> Budget and create a new budget.
226. Go to annual view.
227. Select some categories from Auto & transport.
228. Go to Tools -> Category List or Press (Ctrl + Shift + C)
229. Go to Options -> Assign Category Groups.
230. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
231. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

161. Install Quicken QW 2014 build 23.1.1.17
162. Launch Quicken
163. Open a data file with attachment uploaded to cloud.
164. Go to Edit -> Preferences -> Quicken cloud services
165. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

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226. Launch Quicken
227. Open a data file with attachment uploaded to cloud.
228. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
229. Delete your cloud data.
230. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
231. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

33. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

353. Install Quicken QW 2014 build 23.1.2.8
354. Launch Quicken
355. Add any manual checking account
356. Sync the account to cloud
357. Go to register
358. Attach an attachment
359. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
360. Sign out
361. Again sign as a same user
362. Go to register
363. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

321. Install Quicken Q2014 build 23.1.2.9
322. Launch Quicken.
323. Go to Planning-> Budget and create a new budget.
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325. Click on ‘Select categories to budget’ link at the bottom of the budget page
326. Select any category and Click OK.
327. Enter a transaction of $70 for Sep month
328. Enter $5 budget value and apply for all month
329. Turn ON 'rollover only positive value'
330. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

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3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Rollover icon get stuck and displayed always even after moving control to some another category.

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299. Launch Quicken.
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Actual result: Roll-over edited value is not getting reset when it is turned off.

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Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

166. Install Quicken QW 2014 build 23.1.1.17
167. Launch Quicken
168. Open a data file with attachment uploaded to cloud.
169. Go to Edit -> Preferences -> Quicken cloud services
170. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

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233. Launch Quicken
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236. Delete your cloud data.
237. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
238. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

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For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

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    2. Launch Quicken.
    3. Add any manual checking account.
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    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

364. Install Quicken QW 2014 build 23.1.2.8
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371. Sign out
372. Again sign as a same user
373. Go to register
374. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

331. Install Quicken Q2014 build 23.1.2.9
332. Launch Quicken.
333. Go to Planning-> Budget and create a new budget.
334. Go to annual view
335. Click on ‘Select categories to budget’ link at the bottom of the budget page
336. Select any category and Click OK.
337. Enter a transaction of $70 for Sep month
338. Enter $5 budget value and apply for all month
339. Turn ON 'rollover only positive value'
340. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

307. Install Quicken Q2014 build 23.1.2.5
308. Launch Quicken.
309. Go to Planning-> Budget and create a new budget.
310. Go to annual view.
311. Select some categories.
312. Turn on rollover for any selected categories.
313. Edit the rollover value for any month
314. Turn off the rollover
315. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

239. Go to Planning-> Budget and create a new budget.
240. Go to annual view.
241. Select some categories from Auto & transport.
242. Go to Tools -> Category List or Press (Ctrl + Shift + C)
243. Go to Options -> Assign Category Groups.
244. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
245. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

171. Install Quicken QW 2014 build 23.1.1.17
172. Launch Quicken
173. Open a data file with attachment uploaded to cloud.
174. Go to Edit -> Preferences -> Quicken cloud services
175. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

239. Install Quicken QW 2014 build 23.1.1.17
240. Launch Quicken
241. Open a data file with attachment uploaded to cloud.
242. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
243. Delete your cloud data.
244. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
245. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

35. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

375. Install Quicken QW 2014 build 23.1.2.8
376. Launch Quicken
377. Add any manual checking account
378. Sync the account to cloud
379. Go to register
380. Attach an attachment
381. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
382. Sign out
383. Again sign as a same user
384. Go to register
385. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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347. Enter a transaction of $70 for Sep month
348. Enter $5 budget value and apply for all month
349. Turn ON 'rollover only positive value'
350. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

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Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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322. Edit the rollover value for any month
323. Turn off the rollover
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Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

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249. Go to Tools -> Category List or Press (Ctrl + Shift + C)
250. Go to Options -> Assign Category Groups.
251. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
252. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

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Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

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Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

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7. Click on "Select categories to budget" link at the bottom of the budget page

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Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

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391. Attach an attachment
392. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
393. Sign out
394. Again sign as a same user
395. Go to register
396. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

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Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

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359. Turn ON 'rollover only positive value'
360. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

325. Install Quicken Q2014 build 23.1.2.5
326. Launch Quicken.
327. Go to Planning-> Budget and create a new budget.
328. Go to annual view.
329. Select some categories.
330. Turn on rollover for any selected categories.
331. Edit the rollover value for any month
332. Turn off the rollover
333. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

253. Go to Planning-> Budget and create a new budget.
254. Go to annual view.
255. Select some categories from Auto & transport.
256. Go to Tools -> Category List or Press (Ctrl + Shift + C)
257. Go to Options -> Assign Category Groups.
258. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
259. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

181. Install Quicken QW 2014 build 23.1.1.17
182. Launch Quicken
183. Open a data file with attachment uploaded to cloud.
184. Go to Edit -> Preferences -> Quicken cloud services
185. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

253. Install Quicken QW 2014 build 23.1.1.17
254. Launch Quicken
255. Open a data file with attachment uploaded to cloud.
256. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
257. Delete your cloud data.
258. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
259. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

37. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

397. Install Quicken QW 2014 build 23.1.2.8
398. Launch Quicken
399. Add any manual checking account
400. Sync the account to cloud
401. Go to register
402. Attach an attachment
403. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
404. Sign out
405. Again sign as a same user
406. Go to register
407. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

361. Install Quicken Q2014 build 23.1.2.9
362. Launch Quicken.
363. Go to Planning-> Budget and create a new budget.
364. Go to annual view
365. Click on ‘Select categories to budget’ link at the bottom of the budget page
366. Select any category and Click OK.
367. Enter a transaction of $70 for Sep month
368. Enter $5 budget value and apply for all month
369. Turn ON 'rollover only positive value'
370. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

334. Install Quicken Q2014 build 23.1.2.5
335. Launch Quicken.
336. Go to Planning-> Budget and create a new budget.
337. Go to annual view.
338. Select some categories.
339. Turn on rollover for any selected categories.
340. Edit the rollover value for any month
341. Turn off the rollover
342. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

260. Go to Planning-> Budget and create a new budget.
261. Go to annual view.
262. Select some categories from Auto & transport.
263. Go to Tools -> Category List or Press (Ctrl + Shift + C)
264. Go to Options -> Assign Category Groups.
265. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
266. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

186. Install Quicken QW 2014 build 23.1.1.17
187. Launch Quicken
188. Open a data file with attachment uploaded to cloud.
189. Go to Edit -> Preferences -> Quicken cloud services
190. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

260. Install Quicken QW 2014 build 23.1.1.17
261. Launch Quicken
262. Open a data file with attachment uploaded to cloud.
263. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
264. Delete your cloud data.
265. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
266. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

38. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

408. Install Quicken QW 2014 build 23.1.2.8
409. Launch Quicken
410. Add any manual checking account
411. Sync the account to cloud
412. Go to register
413. Attach an attachment
414. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
415. Sign out
416. Again sign as a same user
417. Go to register
418. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

371. Install Quicken Q2014 build 23.1.2.9
372. Launch Quicken.
373. Go to Planning-> Budget and create a new budget.
374. Go to annual view
375. Click on ‘Select categories to budget’ link at the bottom of the budget page
376. Select any category and Click OK.
377. Enter a transaction of $70 for Sep month
378. Enter $5 budget value and apply for all month
379. Turn ON 'rollover only positive value'
380. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

343. Install Quicken Q2014 build 23.1.2.5
344. Launch Quicken.
345. Go to Planning-> Budget and create a new budget.
346. Go to annual view.
347. Select some categories.
348. Turn on rollover for any selected categories.
349. Edit the rollover value for any month
350. Turn off the rollover
351. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

267. Go to Planning-> Budget and create a new budget.
268. Go to annual view.
269. Select some categories from Auto & transport.
270. Go to Tools -> Category List or Press (Ctrl + Shift + C)
271. Go to Options -> Assign Category Groups.
272. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
273. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

191. Install Quicken QW 2014 build 23.1.1.17
192. Launch Quicken
193. Open a data file with attachment uploaded to cloud.
194. Go to Edit -> Preferences -> Quicken cloud services
195. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

267. Install Quicken QW 2014 build 23.1.1.17
268. Launch Quicken
269. Open a data file with attachment uploaded to cloud.
270. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
271. Delete your cloud data.
272. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
273. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

39. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

419. Install Quicken QW 2014 build 23.1.2.8
420. Launch Quicken
421. Add any manual checking account
422. Sync the account to cloud
423. Go to register
424. Attach an attachment
425. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
426. Sign out
427. Again sign as a same user
428. Go to register
429. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

381. Install Quicken Q2014 build 23.1.2.9
382. Launch Quicken.
383. Go to Planning-> Budget and create a new budget.
384. Go to annual view
385. Click on ‘Select categories to budget’ link at the bottom of the budget page
386. Select any category and Click OK.
387. Enter a transaction of $70 for Sep month
388. Enter $5 budget value and apply for all month
389. Turn ON 'rollover only positive value'
390. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

352. Install Quicken Q2014 build 23.1.2.5
353. Launch Quicken.
354. Go to Planning-> Budget and create a new budget.
355. Go to annual view.
356. Select some categories.
357. Turn on rollover for any selected categories.
358. Edit the rollover value for any month
359. Turn off the rollover
360. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

274. Go to Planning-> Budget and create a new budget.
275. Go to annual view.
276. Select some categories from Auto & transport.
277. Go to Tools -> Category List or Press (Ctrl + Shift + C)
278. Go to Options -> Assign Category Groups.
279. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
280. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

196. Install Quicken QW 2014 build 23.1.1.17
197. Launch Quicken
198. Open a data file with attachment uploaded to cloud.
199. Go to Edit -> Preferences -> Quicken cloud services
200. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

274. Install Quicken QW 2014 build 23.1.1.17
275. Launch Quicken
276. Open a data file with attachment uploaded to cloud.
277. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
278. Delete your cloud data.
279. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
280. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

40. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

430. Install Quicken QW 2014 build 23.1.2.8
431. Launch Quicken
432. Add any manual checking account
433. Sync the account to cloud
434. Go to register
435. Attach an attachment
436. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
437. Sign out
438. Again sign as a same user
439. Go to register
440. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

391. Install Quicken Q2014 build 23.1.2.9
392. Launch Quicken.
393. Go to Planning-> Budget and create a new budget.
394. Go to annual view
395. Click on ‘Select categories to budget’ link at the bottom of the budget page
396. Select any category and Click OK.
397. Enter a transaction of $70 for Sep month
398. Enter $5 budget value and apply for all month
399. Turn ON 'rollover only positive value'
400. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

361. Install Quicken Q2014 build 23.1.2.5
362. Launch Quicken.
363. Go to Planning-> Budget and create a new budget.
364. Go to annual view.
365. Select some categories.
366. Turn on rollover for any selected categories.
367. Edit the rollover value for any month
368. Turn off the rollover
369. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

281. Go to Planning-> Budget and create a new budget.
282. Go to annual view.
283. Select some categories from Auto & transport.
284. Go to Tools -> Category List or Press (Ctrl + Shift + C)
285. Go to Options -> Assign Category Groups.
286. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
287. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

201. Install Quicken QW 2014 build 23.1.1.17
202. Launch Quicken
203. Open a data file with attachment uploaded to cloud.
204. Go to Edit -> Preferences -> Quicken cloud services
205. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

281. Install Quicken QW 2014 build 23.1.1.17
282. Launch Quicken
283. Open a data file with attachment uploaded to cloud.
284. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
285. Delete your cloud data.
286. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
287. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

41. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

441. Install Quicken QW 2014 build 23.1.2.8
442. Launch Quicken
443. Add any manual checking account
444. Sync the account to cloud
445. Go to register
446. Attach an attachment
447. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
448. Sign out
449. Again sign as a same user
450. Go to register
451. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

401. Install Quicken Q2014 build 23.1.2.9
402. Launch Quicken.
403. Go to Planning-> Budget and create a new budget.
404. Go to annual view
405. Click on ‘Select categories to budget’ link at the bottom of the budget page
406. Select any category and Click OK.
407. Enter a transaction of $70 for Sep month
408. Enter $5 budget value and apply for all month
409. Turn ON 'rollover only positive value'
410. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

370. Install Quicken Q2014 build 23.1.2.5
371. Launch Quicken.
372. Go to Planning-> Budget and create a new budget.
373. Go to annual view.
374. Select some categories.
375. Turn on rollover for any selected categories.
376. Edit the rollover value for any month
377. Turn off the rollover
378. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

288. Go to Planning-> Budget and create a new budget.
289. Go to annual view.
290. Select some categories from Auto & transport.
291. Go to Tools -> Category List or Press (Ctrl + Shift + C)
292. Go to Options -> Assign Category Groups.
293. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
294. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

206. Install Quicken QW 2014 build 23.1.1.17
207. Launch Quicken
208. Open a data file with attachment uploaded to cloud.
209. Go to Edit -> Preferences -> Quicken cloud services
210. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

288. Install Quicken QW 2014 build 23.1.1.17
289. Launch Quicken
290. Open a data file with attachment uploaded to cloud.
291. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
292. Delete your cloud data.
293. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
294. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

42. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

452. Install Quicken QW 2014 build 23.1.2.8
453. Launch Quicken
454. Add any manual checking account
455. Sync the account to cloud
456. Go to register
457. Attach an attachment
458. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
459. Sign out
460. Again sign as a same user
461. Go to register
462. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

411. Install Quicken Q2014 build 23.1.2.9
412. Launch Quicken.
413. Go to Planning-> Budget and create a new budget.
414. Go to annual view
415. Click on ‘Select categories to budget’ link at the bottom of the budget page
416. Select any category and Click OK.
417. Enter a transaction of $70 for Sep month
418. Enter $5 budget value and apply for all month
419. Turn ON 'rollover only positive value'
420. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

379. Install Quicken Q2014 build 23.1.2.5
380. Launch Quicken.
381. Go to Planning-> Budget and create a new budget.
382. Go to annual view.
383. Select some categories.
384. Turn on rollover for any selected categories.
385. Edit the rollover value for any month
386. Turn off the rollover
387. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

295. Go to Planning-> Budget and create a new budget.
296. Go to annual view.
297. Select some categories from Auto & transport.
298. Go to Tools -> Category List or Press (Ctrl + Shift + C)
299. Go to Options -> Assign Category Groups.
300. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
301. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

211. Install Quicken QW 2014 build 23.1.1.17
212. Launch Quicken
213. Open a data file with attachment uploaded to cloud.
214. Go to Edit -> Preferences -> Quicken cloud services
215. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

295. Install Quicken QW 2014 build 23.1.1.17
296. Launch Quicken
297. Open a data file with attachment uploaded to cloud.
298. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
299. Delete your cloud data.
300. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
301. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

43. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

463. Install Quicken QW 2014 build 23.1.2.8
464. Launch Quicken
465. Add any manual checking account
466. Sync the account to cloud
467. Go to register
468. Attach an attachment
469. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
470. Sign out
471. Again sign as a same user
472. Go to register
473. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

421. Install Quicken Q2014 build 23.1.2.9
422. Launch Quicken.
423. Go to Planning-> Budget and create a new budget.
424. Go to annual view
425. Click on ‘Select categories to budget’ link at the bottom of the budget page
426. Select any category and Click OK.
427. Enter a transaction of $70 for Sep month
428. Enter $5 budget value and apply for all month
429. Turn ON 'rollover only positive value'
430. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

388. Install Quicken Q2014 build 23.1.2.5
389. Launch Quicken.
390. Go to Planning-> Budget and create a new budget.
391. Go to annual view.
392. Select some categories.
393. Turn on rollover for any selected categories.
394. Edit the rollover value for any month
395. Turn off the rollover
396. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

302. Go to Planning-> Budget and create a new budget.
303. Go to annual view.
304. Select some categories from Auto & transport.
305. Go to Tools -> Category List or Press (Ctrl + Shift + C)
306. Go to Options -> Assign Category Groups.
307. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
308. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

216. Install Quicken QW 2014 build 23.1.1.17
217. Launch Quicken
218. Open a data file with attachment uploaded to cloud.
219. Go to Edit -> Preferences -> Quicken cloud services
220. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

302. Install Quicken QW 2014 build 23.1.1.17
303. Launch Quicken
304. Open a data file with attachment uploaded to cloud.
305. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
306. Delete your cloud data.
307. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
308. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

44. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

474. Install Quicken QW 2014 build 23.1.2.8
475. Launch Quicken
476. Add any manual checking account
477. Sync the account to cloud
478. Go to register
479. Attach an attachment
480. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
481. Sign out
482. Again sign as a same user
483. Go to register
484. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

431. Install Quicken Q2014 build 23.1.2.9
432. Launch Quicken.
433. Go to Planning-> Budget and create a new budget.
434. Go to annual view
435. Click on ‘Select categories to budget’ link at the bottom of the budget page
436. Select any category and Click OK.
437. Enter a transaction of $70 for Sep month
438. Enter $5 budget value and apply for all month
439. Turn ON 'rollover only positive value'
440. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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2. Launch Quicken.

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6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

397. Install Quicken Q2014 build 23.1.2.5
398. Launch Quicken.
399. Go to Planning-> Budget and create a new budget.
400. Go to annual view.
401. Select some categories.
402. Turn on rollover for any selected categories.
403. Edit the rollover value for any month
404. Turn off the rollover
405. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

309. Go to Planning-> Budget and create a new budget.
310. Go to annual view.
311. Select some categories from Auto & transport.
312. Go to Tools -> Category List or Press (Ctrl + Shift + C)
313. Go to Options -> Assign Category Groups.
314. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
315. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

221. Install Quicken QW 2014 build 23.1.1.17
222. Launch Quicken
223. Open a data file with attachment uploaded to cloud.
224. Go to Edit -> Preferences -> Quicken cloud services
225. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

309. Install Quicken QW 2014 build 23.1.1.17
310. Launch Quicken
311. Open a data file with attachment uploaded to cloud.
312. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
313. Delete your cloud data.
314. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
315. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

45. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

485. Install Quicken QW 2014 build 23.1.2.8
486. Launch Quicken
487. Add any manual checking account
488. Sync the account to cloud
489. Go to register
490. Attach an attachment
491. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
492. Sign out
493. Again sign as a same user
494. Go to register
495. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

441. Install Quicken Q2014 build 23.1.2.9
442. Launch Quicken.
443. Go to Planning-> Budget and create a new budget.
444. Go to annual view
445. Click on ‘Select categories to budget’ link at the bottom of the budget page
446. Select any category and Click OK.
447. Enter a transaction of $70 for Sep month
448. Enter $5 budget value and apply for all month
449. Turn ON 'rollover only positive value'
450. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

406. Install Quicken Q2014 build 23.1.2.5
407. Launch Quicken.
408. Go to Planning-> Budget and create a new budget.
409. Go to annual view.
410. Select some categories.
411. Turn on rollover for any selected categories.
412. Edit the rollover value for any month
413. Turn off the rollover
414. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

316. Go to Planning-> Budget and create a new budget.
317. Go to annual view.
318. Select some categories from Auto & transport.
319. Go to Tools -> Category List or Press (Ctrl + Shift + C)
320. Go to Options -> Assign Category Groups.
321. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
322. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

226. Install Quicken QW 2014 build 23.1.1.17
227. Launch Quicken
228. Open a data file with attachment uploaded to cloud.
229. Go to Edit -> Preferences -> Quicken cloud services
230. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

316. Install Quicken QW 2014 build 23.1.1.17
317. Launch Quicken
318. Open a data file with attachment uploaded to cloud.
319. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
320. Delete your cloud data.
321. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
322. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

46. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

496. Install Quicken QW 2014 build 23.1.2.8
497. Launch Quicken
498. Add any manual checking account
499. Sync the account to cloud
500. Go to register
501. Attach an attachment
502. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
503. Sign out
504. Again sign as a same user
505. Go to register
506. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

451. Install Quicken Q2014 build 23.1.2.9
452. Launch Quicken.
453. Go to Planning-> Budget and create a new budget.
454. Go to annual view
455. Click on ‘Select categories to budget’ link at the bottom of the budget page
456. Select any category and Click OK.
457. Enter a transaction of $70 for Sep month
458. Enter $5 budget value and apply for all month
459. Turn ON 'rollover only positive value'
460. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

415. Install Quicken Q2014 build 23.1.2.5
416. Launch Quicken.
417. Go to Planning-> Budget and create a new budget.
418. Go to annual view.
419. Select some categories.
420. Turn on rollover for any selected categories.
421. Edit the rollover value for any month
422. Turn off the rollover
423. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

323. Go to Planning-> Budget and create a new budget.
324. Go to annual view.
325. Select some categories from Auto & transport.
326. Go to Tools -> Category List or Press (Ctrl + Shift + C)
327. Go to Options -> Assign Category Groups.
328. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
329. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

231. Install Quicken QW 2014 build 23.1.1.17
232. Launch Quicken
233. Open a data file with attachment uploaded to cloud.
234. Go to Edit -> Preferences -> Quicken cloud services
235. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

323. Install Quicken QW 2014 build 23.1.1.17
324. Launch Quicken
325. Open a data file with attachment uploaded to cloud.
326. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
327. Delete your cloud data.
328. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
329. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

47. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

507. Install Quicken QW 2014 build 23.1.2.8
508. Launch Quicken
509. Add any manual checking account
510. Sync the account to cloud
511. Go to register
512. Attach an attachment
513. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
514. Sign out
515. Again sign as a same user
516. Go to register
517. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

461. Install Quicken Q2014 build 23.1.2.9
462. Launch Quicken.
463. Go to Planning-> Budget and create a new budget.
464. Go to annual view
465. Click on ‘Select categories to budget’ link at the bottom of the budget page
466. Select any category and Click OK.
467. Enter a transaction of $70 for Sep month
468. Enter $5 budget value and apply for all month
469. Turn ON 'rollover only positive value'
470. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

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3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

424. Install Quicken Q2014 build 23.1.2.5
425. Launch Quicken.
426. Go to Planning-> Budget and create a new budget.
427. Go to annual view.
428. Select some categories.
429. Turn on rollover for any selected categories.
430. Edit the rollover value for any month
431. Turn off the rollover
432. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

330. Go to Planning-> Budget and create a new budget.
331. Go to annual view.
332. Select some categories from Auto & transport.
333. Go to Tools -> Category List or Press (Ctrl + Shift + C)
334. Go to Options -> Assign Category Groups.
335. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
336. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

236. Install Quicken QW 2014 build 23.1.1.17
237. Launch Quicken
238. Open a data file with attachment uploaded to cloud.
239. Go to Edit -> Preferences -> Quicken cloud services
240. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

330. Install Quicken QW 2014 build 23.1.1.17
331. Launch Quicken
332. Open a data file with attachment uploaded to cloud.
333. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
334. Delete your cloud data.
335. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
336. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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3. Go to Planning-> Budget and create a new budget.
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

48. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

518. Install Quicken QW 2014 build 23.1.2.8
519. Launch Quicken
520. Add any manual checking account
521. Sync the account to cloud
522. Go to register
523. Attach an attachment
524. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
525. Sign out
526. Again sign as a same user
527. Go to register
528. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

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Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

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If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

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477. Enter a transaction of $70 for Sep month
478. Enter $5 budget value and apply for all month
479. Turn ON 'rollover only positive value'
480. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

433. Install Quicken Q2014 build 23.1.2.5
434. Launch Quicken.
435. Go to Planning-> Budget and create a new budget.
436. Go to annual view.
437. Select some categories.
438. Turn on rollover for any selected categories.
439. Edit the rollover value for any month
440. Turn off the rollover
441. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

337. Go to Planning-> Budget and create a new budget.
338. Go to annual view.
339. Select some categories from Auto & transport.
340. Go to Tools -> Category List or Press (Ctrl + Shift + C)
341. Go to Options -> Assign Category Groups.
342. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
343. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

241. Install Quicken QW 2014 build 23.1.1.17
242. Launch Quicken
243. Open a data file with attachment uploaded to cloud.
244. Go to Edit -> Preferences -> Quicken cloud services
245. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

337. Install Quicken QW 2014 build 23.1.1.17
338. Launch Quicken
339. Open a data file with attachment uploaded to cloud.
340. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
341. Delete your cloud data.
342. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
343. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

49. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

529. Install Quicken QW 2014 build 23.1.2.8
530. Launch Quicken
531. Add any manual checking account
532. Sync the account to cloud
533. Go to register
534. Attach an attachment
535. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
536. Sign out
537. Again sign as a same user
538. Go to register
539. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

481. Install Quicken Q2014 build 23.1.2.9
482. Launch Quicken.
483. Go to Planning-> Budget and create a new budget.
484. Go to annual view
485. Click on ‘Select categories to budget’ link at the bottom of the budget page
486. Select any category and Click OK.
487. Enter a transaction of $70 for Sep month
488. Enter $5 budget value and apply for all month
489. Turn ON 'rollover only positive value'
490. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

442. Install Quicken Q2014 build 23.1.2.5
443. Launch Quicken.
444. Go to Planning-> Budget and create a new budget.
445. Go to annual view.
446. Select some categories.
447. Turn on rollover for any selected categories.
448. Edit the rollover value for any month
449. Turn off the rollover
450. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

344. Go to Planning-> Budget and create a new budget.
345. Go to annual view.
346. Select some categories from Auto & transport.
347. Go to Tools -> Category List or Press (Ctrl + Shift + C)
348. Go to Options -> Assign Category Groups.
349. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
350. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

246. Install Quicken QW 2014 build 23.1.1.17
247. Launch Quicken
248. Open a data file with attachment uploaded to cloud.
249. Go to Edit -> Preferences -> Quicken cloud services
250. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

344. Install Quicken QW 2014 build 23.1.1.17
345. Launch Quicken
346. Open a data file with attachment uploaded to cloud.
347. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
348. Delete your cloud data.
349. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
350. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

50. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

540. Install Quicken QW 2014 build 23.1.2.8
541. Launch Quicken
542. Add any manual checking account
543. Sync the account to cloud
544. Go to register
545. Attach an attachment
546. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
547. Sign out
548. Again sign as a same user
549. Go to register
550. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

491. Install Quicken Q2014 build 23.1.2.9
492. Launch Quicken.
493. Go to Planning-> Budget and create a new budget.
494. Go to annual view
495. Click on ‘Select categories to budget’ link at the bottom of the budget page
496. Select any category and Click OK.
497. Enter a transaction of $70 for Sep month
498. Enter $5 budget value and apply for all month
499. Turn ON 'rollover only positive value'
500. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

451. Install Quicken Q2014 build 23.1.2.5
452. Launch Quicken.
453. Go to Planning-> Budget and create a new budget.
454. Go to annual view.
455. Select some categories.
456. Turn on rollover for any selected categories.
457. Edit the rollover value for any month
458. Turn off the rollover
459. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

351. Go to Planning-> Budget and create a new budget.
352. Go to annual view.
353. Select some categories from Auto & transport.
354. Go to Tools -> Category List or Press (Ctrl + Shift + C)
355. Go to Options -> Assign Category Groups.
356. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
357. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

251. Install Quicken QW 2014 build 23.1.1.17
252. Launch Quicken
253. Open a data file with attachment uploaded to cloud.
254. Go to Edit -> Preferences -> Quicken cloud services
255. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

351. Install Quicken QW 2014 build 23.1.1.17
352. Launch Quicken
353. Open a data file with attachment uploaded to cloud.
354. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
355. Delete your cloud data.
356. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
357. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

51. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

551. Install Quicken QW 2014 build 23.1.2.8
552. Launch Quicken
553. Add any manual checking account
554. Sync the account to cloud
555. Go to register
556. Attach an attachment
557. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
558. Sign out
559. Again sign as a same user
560. Go to register
561. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

501. Install Quicken Q2014 build 23.1.2.9
502. Launch Quicken.
503. Go to Planning-> Budget and create a new budget.
504. Go to annual view
505. Click on ‘Select categories to budget’ link at the bottom of the budget page
506. Select any category and Click OK.
507. Enter a transaction of $70 for Sep month
508. Enter $5 budget value and apply for all month
509. Turn ON 'rollover only positive value'
510. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

460. Install Quicken Q2014 build 23.1.2.5
461. Launch Quicken.
462. Go to Planning-> Budget and create a new budget.
463. Go to annual view.
464. Select some categories.
465. Turn on rollover for any selected categories.
466. Edit the rollover value for any month
467. Turn off the rollover
468. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

358. Go to Planning-> Budget and create a new budget.
359. Go to annual view.
360. Select some categories from Auto & transport.
361. Go to Tools -> Category List or Press (Ctrl + Shift + C)
362. Go to Options -> Assign Category Groups.
363. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
364. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

256. Install Quicken QW 2014 build 23.1.1.17
257. Launch Quicken
258. Open a data file with attachment uploaded to cloud.
259. Go to Edit -> Preferences -> Quicken cloud services
260. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

358. Install Quicken QW 2014 build 23.1.1.17
359. Launch Quicken
360. Open a data file with attachment uploaded to cloud.
361. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
362. Delete your cloud data.
363. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
364. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

52. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

562. Install Quicken QW 2014 build 23.1.2.8
563. Launch Quicken
564. Add any manual checking account
565. Sync the account to cloud
566. Go to register
567. Attach an attachment
568. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
569. Sign out
570. Again sign as a same user
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572. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

511. Install Quicken Q2014 build 23.1.2.9
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515. Click on ‘Select categories to budget’ link at the bottom of the budget page
516. Select any category and Click OK.
517. Enter a transaction of $70 for Sep month
518. Enter $5 budget value and apply for all month
519. Turn ON 'rollover only positive value'
520. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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3. Resize the Quicken window

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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470. Launch Quicken.
471. Go to Planning-> Budget and create a new budget.
472. Go to annual view.
473. Select some categories.
474. Turn on rollover for any selected categories.
475. Edit the rollover value for any month
476. Turn off the rollover
477. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

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Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

261. Install Quicken QW 2014 build 23.1.1.17
262. Launch Quicken
263. Open a data file with attachment uploaded to cloud.
264. Go to Edit -> Preferences -> Quicken cloud services
265. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

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369. Delete your cloud data.
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371. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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After mouse-hover also, it is not getting displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

573. Install Quicken QW 2014 build 23.1.2.8
574. Launch Quicken
575. Add any manual checking account
576. Sync the account to cloud
577. Go to register
578. Attach an attachment
579. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
580. Sign out
581. Again sign as a same user
582. Go to register
583. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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523. Go to Planning-> Budget and create a new budget.
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526. Select any category and Click OK.
527. Enter a transaction of $70 for Sep month
528. Enter $5 budget value and apply for all month
529. Turn ON 'rollover only positive value'
530. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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2. Launch Quicken.

3. Resize the Quicken window

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

478. Install Quicken Q2014 build 23.1.2.5
479. Launch Quicken.
480. Go to Planning-> Budget and create a new budget.
481. Go to annual view.
482. Select some categories.
483. Turn on rollover for any selected categories.
484. Edit the rollover value for any month
485. Turn off the rollover
486. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

372. Go to Planning-> Budget and create a new budget.
373. Go to annual view.
374. Select some categories from Auto & transport.
375. Go to Tools -> Category List or Press (Ctrl + Shift + C)
376. Go to Options -> Assign Category Groups.
377. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
378. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

266. Install Quicken QW 2014 build 23.1.1.17
267. Launch Quicken
268. Open a data file with attachment uploaded to cloud.
269. Go to Edit -> Preferences -> Quicken cloud services
270. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

372. Install Quicken QW 2014 build 23.1.1.17
373. Launch Quicken
374. Open a data file with attachment uploaded to cloud.
375. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
376. Delete your cloud data.
377. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
378. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

54. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

584. Install Quicken QW 2014 build 23.1.2.8
585. Launch Quicken
586. Add any manual checking account
587. Sync the account to cloud
588. Go to register
589. Attach an attachment
590. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
591. Sign out
592. Again sign as a same user
593. Go to register
594. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

531. Install Quicken Q2014 build 23.1.2.9
532. Launch Quicken.
533. Go to Planning-> Budget and create a new budget.
534. Go to annual view
535. Click on ‘Select categories to budget’ link at the bottom of the budget page
536. Select any category and Click OK.
537. Enter a transaction of $70 for Sep month
538. Enter $5 budget value and apply for all month
539. Turn ON 'rollover only positive value'
540. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

487. Install Quicken Q2014 build 23.1.2.5
488. Launch Quicken.
489. Go to Planning-> Budget and create a new budget.
490. Go to annual view.
491. Select some categories.
492. Turn on rollover for any selected categories.
493. Edit the rollover value for any month
494. Turn off the rollover
495. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

379. Go to Planning-> Budget and create a new budget.
380. Go to annual view.
381. Select some categories from Auto & transport.
382. Go to Tools -> Category List or Press (Ctrl + Shift + C)
383. Go to Options -> Assign Category Groups.
384. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
385. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

271. Install Quicken QW 2014 build 23.1.1.17
272. Launch Quicken
273. Open a data file with attachment uploaded to cloud.
274. Go to Edit -> Preferences -> Quicken cloud services
275. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

379. Install Quicken QW 2014 build 23.1.1.17
380. Launch Quicken
381. Open a data file with attachment uploaded to cloud.
382. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
383. Delete your cloud data.
384. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
385. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

55. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

595. Install Quicken QW 2014 build 23.1.2.8
596. Launch Quicken
597. Add any manual checking account
598. Sync the account to cloud
599. Go to register
600. Attach an attachment
601. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
602. Sign out
603. Again sign as a same user
604. Go to register
605. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

541. Install Quicken Q2014 build 23.1.2.9
542. Launch Quicken.
543. Go to Planning-> Budget and create a new budget.
544. Go to annual view
545. Click on ‘Select categories to budget’ link at the bottom of the budget page
546. Select any category and Click OK.
547. Enter a transaction of $70 for Sep month
548. Enter $5 budget value and apply for all month
549. Turn ON 'rollover only positive value'
550. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

496. Install Quicken Q2014 build 23.1.2.5
497. Launch Quicken.
498. Go to Planning-> Budget and create a new budget.
499. Go to annual view.
500. Select some categories.
501. Turn on rollover for any selected categories.
502. Edit the rollover value for any month
503. Turn off the rollover
504. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

386. Go to Planning-> Budget and create a new budget.
387. Go to annual view.
388. Select some categories from Auto & transport.
389. Go to Tools -> Category List or Press (Ctrl + Shift + C)
390. Go to Options -> Assign Category Groups.
391. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
392. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

276. Install Quicken QW 2014 build 23.1.1.17
277. Launch Quicken
278. Open a data file with attachment uploaded to cloud.
279. Go to Edit -> Preferences -> Quicken cloud services
280. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

386. Install Quicken QW 2014 build 23.1.1.17
387. Launch Quicken
388. Open a data file with attachment uploaded to cloud.
389. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
390. Delete your cloud data.
391. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
392. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

56. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

606. Install Quicken QW 2014 build 23.1.2.8
607. Launch Quicken
608. Add any manual checking account
609. Sync the account to cloud
610. Go to register
611. Attach an attachment
612. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
613. Sign out
614. Again sign as a same user
615. Go to register
616. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

551. Install Quicken Q2014 build 23.1.2.9
552. Launch Quicken.
553. Go to Planning-> Budget and create a new budget.
554. Go to annual view
555. Click on ‘Select categories to budget’ link at the bottom of the budget page
556. Select any category and Click OK.
557. Enter a transaction of $70 for Sep month
558. Enter $5 budget value and apply for all month
559. Turn ON 'rollover only positive value'
560. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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507. Go to Planning-> Budget and create a new budget.
508. Go to annual view.
509. Select some categories.
510. Turn on rollover for any selected categories.
511. Edit the rollover value for any month
512. Turn off the rollover
513. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

393. Go to Planning-> Budget and create a new budget.
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395. Select some categories from Auto & transport.
396. Go to Tools -> Category List or Press (Ctrl + Shift + C)
397. Go to Options -> Assign Category Groups.
398. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

281. Install Quicken QW 2014 build 23.1.1.17
282. Launch Quicken
283. Open a data file with attachment uploaded to cloud.
284. Go to Edit -> Preferences -> Quicken cloud services
285. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

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394. Launch Quicken
395. Open a data file with attachment uploaded to cloud.
396. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
397. Delete your cloud data.
398. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
399. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

57. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

617. Install Quicken QW 2014 build 23.1.2.8
618. Launch Quicken
619. Add any manual checking account
620. Sync the account to cloud
621. Go to register
622. Attach an attachment
623. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
624. Sign out
625. Again sign as a same user
626. Go to register
627. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

561. Install Quicken Q2014 build 23.1.2.9
562. Launch Quicken.
563. Go to Planning-> Budget and create a new budget.
564. Go to annual view
565. Click on ‘Select categories to budget’ link at the bottom of the budget page
566. Select any category and Click OK.
567. Enter a transaction of $70 for Sep month
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569. Turn ON 'rollover only positive value'
570. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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5. Right-click on Quicken icon in taskbar and close Quicken

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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515. Launch Quicken.
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520. Edit the rollover value for any month
521. Turn off the rollover
522. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

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In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

286. Install Quicken QW 2014 build 23.1.1.17
287. Launch Quicken
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Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

628. Install Quicken QW 2014 build 23.1.2.8
629. Launch Quicken
630. Add any manual checking account
631. Sync the account to cloud
632. Go to register
633. Attach an attachment
634. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
635. Sign out
636. Again sign as a same user
637. Go to register
638. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

571. Install Quicken Q2014 build 23.1.2.9
572. Launch Quicken.
573. Go to Planning-> Budget and create a new budget.
574. Go to annual view
575. Click on ‘Select categories to budget’ link at the bottom of the budget page
576. Select any category and Click OK.
577. Enter a transaction of $70 for Sep month
578. Enter $5 budget value and apply for all month
579. Turn ON 'rollover only positive value'
580. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

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3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

523. Install Quicken Q2014 build 23.1.2.5
524. Launch Quicken.
525. Go to Planning-> Budget and create a new budget.
526. Go to annual view.
527. Select some categories.
528. Turn on rollover for any selected categories.
529. Edit the rollover value for any month
530. Turn off the rollover
531. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

407. Go to Planning-> Budget and create a new budget.
408. Go to annual view.
409. Select some categories from Auto & transport.
410. Go to Tools -> Category List or Press (Ctrl + Shift + C)
411. Go to Options -> Assign Category Groups.
412. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
413. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

291. Install Quicken QW 2014 build 23.1.1.17
292. Launch Quicken
293. Open a data file with attachment uploaded to cloud.
294. Go to Edit -> Preferences -> Quicken cloud services
295. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

407. Install Quicken QW 2014 build 23.1.1.17
408. Launch Quicken
409. Open a data file with attachment uploaded to cloud.
410. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
411. Delete your cloud data.
412. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
413. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

59. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

639. Install Quicken QW 2014 build 23.1.2.8
640. Launch Quicken
641. Add any manual checking account
642. Sync the account to cloud
643. Go to register
644. Attach an attachment
645. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
646. Sign out
647. Again sign as a same user
648. Go to register
649. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

581. Install Quicken Q2014 build 23.1.2.9
582. Launch Quicken.
583. Go to Planning-> Budget and create a new budget.
584. Go to annual view
585. Click on ‘Select categories to budget’ link at the bottom of the budget page
586. Select any category and Click OK.
587. Enter a transaction of $70 for Sep month
588. Enter $5 budget value and apply for all month
589. Turn ON 'rollover only positive value'
590. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

532. Install Quicken Q2014 build 23.1.2.5
533. Launch Quicken.
534. Go to Planning-> Budget and create a new budget.
535. Go to annual view.
536. Select some categories.
537. Turn on rollover for any selected categories.
538. Edit the rollover value for any month
539. Turn off the rollover
540. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

414. Go to Planning-> Budget and create a new budget.
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416. Select some categories from Auto & transport.
417. Go to Tools -> Category List or Press (Ctrl + Shift + C)
418. Go to Options -> Assign Category Groups.
419. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
420. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

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298. Open a data file with attachment uploaded to cloud.
299. Go to Edit -> Preferences -> Quicken cloud services
300. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

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419. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
420. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

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    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
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Attachments are getting deleting from cloud if user sign out and sign in as same user.

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653. Sync the account to cloud
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657. Sign out
658. Again sign as a same user
659. Go to register
660. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

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Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

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598. Enter $5 budget value and apply for all month
599. Turn ON 'rollover only positive value'
600. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

541. Install Quicken Q2014 build 23.1.2.5
542. Launch Quicken.
543. Go to Planning-> Budget and create a new budget.
544. Go to annual view.
545. Select some categories.
546. Turn on rollover for any selected categories.
547. Edit the rollover value for any month
548. Turn off the rollover
549. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

421. Go to Planning-> Budget and create a new budget.
422. Go to annual view.
423. Select some categories from Auto & transport.
424. Go to Tools -> Category List or Press (Ctrl + Shift + C)
425. Go to Options -> Assign Category Groups.
426. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
427. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

301. Install Quicken QW 2014 build 23.1.1.17
302. Launch Quicken
303. Open a data file with attachment uploaded to cloud.
304. Go to Edit -> Preferences -> Quicken cloud services
305. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

421. Install Quicken QW 2014 build 23.1.1.17
422. Launch Quicken
423. Open a data file with attachment uploaded to cloud.
424. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
425. Delete your cloud data.
426. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
427. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

61. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

661. Install Quicken QW 2014 build 23.1.2.8
662. Launch Quicken
663. Add any manual checking account
664. Sync the account to cloud
665. Go to register
666. Attach an attachment
667. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
668. Sign out
669. Again sign as a same user
670. Go to register
671. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

601. Install Quicken Q2014 build 23.1.2.9
602. Launch Quicken.
603. Go to Planning-> Budget and create a new budget.
604. Go to annual view
605. Click on ‘Select categories to budget’ link at the bottom of the budget page
606. Select any category and Click OK.
607. Enter a transaction of $70 for Sep month
608. Enter $5 budget value and apply for all month
609. Turn ON 'rollover only positive value'
610. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

550. Install Quicken Q2014 build 23.1.2.5
551. Launch Quicken.
552. Go to Planning-> Budget and create a new budget.
553. Go to annual view.
554. Select some categories.
555. Turn on rollover for any selected categories.
556. Edit the rollover value for any month
557. Turn off the rollover
558. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

428. Go to Planning-> Budget and create a new budget.
429. Go to annual view.
430. Select some categories from Auto & transport.
431. Go to Tools -> Category List or Press (Ctrl + Shift + C)
432. Go to Options -> Assign Category Groups.
433. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
434. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

306. Install Quicken QW 2014 build 23.1.1.17
307. Launch Quicken
308. Open a data file with attachment uploaded to cloud.
309. Go to Edit -> Preferences -> Quicken cloud services
310. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

428. Install Quicken QW 2014 build 23.1.1.17
429. Launch Quicken
430. Open a data file with attachment uploaded to cloud.
431. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
432. Delete your cloud data.
433. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
434. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

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    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

672. Install Quicken QW 2014 build 23.1.2.8
673. Launch Quicken
674. Add any manual checking account
675. Sync the account to cloud
676. Go to register
677. Attach an attachment
678. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
679. Sign out
680. Again sign as a same user
681. Go to register
682. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

611. Install Quicken Q2014 build 23.1.2.9
612. Launch Quicken.
613. Go to Planning-> Budget and create a new budget.
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615. Click on ‘Select categories to budget’ link at the bottom of the budget page
616. Select any category and Click OK.
617. Enter a transaction of $70 for Sep month
618. Enter $5 budget value and apply for all month
619. Turn ON 'rollover only positive value'
620. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

559. Install Quicken Q2014 build 23.1.2.5
560. Launch Quicken.
561. Go to Planning-> Budget and create a new budget.
562. Go to annual view.
563. Select some categories.
564. Turn on rollover for any selected categories.
565. Edit the rollover value for any month
566. Turn off the rollover
567. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

435. Go to Planning-> Budget and create a new budget.
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438. Go to Tools -> Category List or Press (Ctrl + Shift + C)
439. Go to Options -> Assign Category Groups.
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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

311. Install Quicken QW 2014 build 23.1.1.17
312. Launch Quicken
313. Open a data file with attachment uploaded to cloud.
314. Go to Edit -> Preferences -> Quicken cloud services
315. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

435. Install Quicken QW 2014 build 23.1.1.17
436. Launch Quicken
437. Open a data file with attachment uploaded to cloud.
438. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
439. Delete your cloud data.
440. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
441. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

63. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

683. Install Quicken QW 2014 build 23.1.2.8
684. Launch Quicken
685. Add any manual checking account
686. Sync the account to cloud
687. Go to register
688. Attach an attachment
689. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
690. Sign out
691. Again sign as a same user
692. Go to register
693. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

621. Install Quicken Q2014 build 23.1.2.9
622. Launch Quicken.
623. Go to Planning-> Budget and create a new budget.
624. Go to annual view
625. Click on ‘Select categories to budget’ link at the bottom of the budget page
626. Select any category and Click OK.
627. Enter a transaction of $70 for Sep month
628. Enter $5 budget value and apply for all month
629. Turn ON 'rollover only positive value'
630. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

568. Install Quicken Q2014 build 23.1.2.5
569. Launch Quicken.
570. Go to Planning-> Budget and create a new budget.
571. Go to annual view.
572. Select some categories.
573. Turn on rollover for any selected categories.
574. Edit the rollover value for any month
575. Turn off the rollover
576. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

442. Go to Planning-> Budget and create a new budget.
443. Go to annual view.
444. Select some categories from Auto & transport.
445. Go to Tools -> Category List or Press (Ctrl + Shift + C)
446. Go to Options -> Assign Category Groups.
447. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
448. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

316. Install Quicken QW 2014 build 23.1.1.17
317. Launch Quicken
318. Open a data file with attachment uploaded to cloud.
319. Go to Edit -> Preferences -> Quicken cloud services
320. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

442. Install Quicken QW 2014 build 23.1.1.17
443. Launch Quicken
444. Open a data file with attachment uploaded to cloud.
445. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
446. Delete your cloud data.
447. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
448. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

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2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

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    2. Launch Quicken.
    3. Add any manual checking account.
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    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

694. Install Quicken QW 2014 build 23.1.2.8
695. Launch Quicken
696. Add any manual checking account
697. Sync the account to cloud
698. Go to register
699. Attach an attachment
700. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
701. Sign out
702. Again sign as a same user
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704. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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636. Select any category and Click OK.
637. Enter a transaction of $70 for Sep month
638. Enter $5 budget value and apply for all month
639. Turn ON 'rollover only positive value'
640. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Actual result: - Quicken menu gets disappears

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Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

577. Install Quicken Q2014 build 23.1.2.5
578. Launch Quicken.
579. Go to Planning-> Budget and create a new budget.
580. Go to annual view.
581. Select some categories.
582. Turn on rollover for any selected categories.
583. Edit the rollover value for any month
584. Turn off the rollover
585. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

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Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

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325. Unlink your cloud data.

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454. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
455. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

705. Install Quicken QW 2014 build 23.1.2.8
706. Launch Quicken
707. Add any manual checking account
708. Sync the account to cloud
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710. Attach an attachment
711. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
712. Sign out
713. Again sign as a same user
714. Go to register
715. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

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If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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650. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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2. Launch Quicken.

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Actual result: - Quicken menu gets disappears

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3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

586. Install Quicken Q2014 build 23.1.2.5
587. Launch Quicken.
588. Go to Planning-> Budget and create a new budget.
589. Go to annual view.
590. Select some categories.
591. Turn on rollover for any selected categories.
592. Edit the rollover value for any month
593. Turn off the rollover
594. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

456. Go to Planning-> Budget and create a new budget.
457. Go to annual view.
458. Select some categories from Auto & transport.
459. Go to Tools -> Category List or Press (Ctrl + Shift + C)
460. Go to Options -> Assign Category Groups.
461. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
462. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

326. Install Quicken QW 2014 build 23.1.1.17
327. Launch Quicken
328. Open a data file with attachment uploaded to cloud.
329. Go to Edit -> Preferences -> Quicken cloud services
330. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

456. Install Quicken QW 2014 build 23.1.1.17
457. Launch Quicken
458. Open a data file with attachment uploaded to cloud.
459. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
460. Delete your cloud data.
461. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
462. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

66. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

716. Install Quicken QW 2014 build 23.1.2.8
717. Launch Quicken
718. Add any manual checking account
719. Sync the account to cloud
720. Go to register
721. Attach an attachment
722. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
723. Sign out
724. Again sign as a same user
725. Go to register
726. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

651. Install Quicken Q2014 build 23.1.2.9
652. Launch Quicken.
653. Go to Planning-> Budget and create a new budget.
654. Go to annual view
655. Click on ‘Select categories to budget’ link at the bottom of the budget page
656. Select any category and Click OK.
657. Enter a transaction of $70 for Sep month
658. Enter $5 budget value and apply for all month
659. Turn ON 'rollover only positive value'
660. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

595. Install Quicken Q2014 build 23.1.2.5
596. Launch Quicken.
597. Go to Planning-> Budget and create a new budget.
598. Go to annual view.
599. Select some categories.
600. Turn on rollover for any selected categories.
601. Edit the rollover value for any month
602. Turn off the rollover
603. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

463. Go to Planning-> Budget and create a new budget.
464. Go to annual view.
465. Select some categories from Auto & transport.
466. Go to Tools -> Category List or Press (Ctrl + Shift + C)
467. Go to Options -> Assign Category Groups.
468. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
469. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

331. Install Quicken QW 2014 build 23.1.1.17
332. Launch Quicken
333. Open a data file with attachment uploaded to cloud.
334. Go to Edit -> Preferences -> Quicken cloud services
335. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

463. Install Quicken QW 2014 build 23.1.1.17
464. Launch Quicken
465. Open a data file with attachment uploaded to cloud.
466. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
467. Delete your cloud data.
468. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
469. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

67. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

727. Install Quicken QW 2014 build 23.1.2.8
728. Launch Quicken
729. Add any manual checking account
730. Sync the account to cloud
731. Go to register
732. Attach an attachment
733. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
734. Sign out
735. Again sign as a same user
736. Go to register
737. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

661. Install Quicken Q2014 build 23.1.2.9
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666. Select any category and Click OK.
667. Enter a transaction of $70 for Sep month
668. Enter $5 budget value and apply for all month
669. Turn ON 'rollover only positive value'
670. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

604. Install Quicken Q2014 build 23.1.2.5
605. Launch Quicken.
606. Go to Planning-> Budget and create a new budget.
607. Go to annual view.
608. Select some categories.
609. Turn on rollover for any selected categories.
610. Edit the rollover value for any month
611. Turn off the rollover
612. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

470. Go to Planning-> Budget and create a new budget.
471. Go to annual view.
472. Select some categories from Auto & transport.
473. Go to Tools -> Category List or Press (Ctrl + Shift + C)
474. Go to Options -> Assign Category Groups.
475. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
476. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

336. Install Quicken QW 2014 build 23.1.1.17
337. Launch Quicken
338. Open a data file with attachment uploaded to cloud.
339. Go to Edit -> Preferences -> Quicken cloud services
340. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

470. Install Quicken QW 2014 build 23.1.1.17
471. Launch Quicken
472. Open a data file with attachment uploaded to cloud.
473. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
474. Delete your cloud data.
475. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
476. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

68. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

738. Install Quicken QW 2014 build 23.1.2.8
739. Launch Quicken
740. Add any manual checking account
741. Sync the account to cloud
742. Go to register
743. Attach an attachment
744. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
745. Sign out
746. Again sign as a same user
747. Go to register
748. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

671. Install Quicken Q2014 build 23.1.2.9
672. Launch Quicken.
673. Go to Planning-> Budget and create a new budget.
674. Go to annual view
675. Click on ‘Select categories to budget’ link at the bottom of the budget page
676. Select any category and Click OK.
677. Enter a transaction of $70 for Sep month
678. Enter $5 budget value and apply for all month
679. Turn ON 'rollover only positive value'
680. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

613. Install Quicken Q2014 build 23.1.2.5
614. Launch Quicken.
615. Go to Planning-> Budget and create a new budget.
616. Go to annual view.
617. Select some categories.
618. Turn on rollover for any selected categories.
619. Edit the rollover value for any month
620. Turn off the rollover
621. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

477. Go to Planning-> Budget and create a new budget.
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479. Select some categories from Auto & transport.
480. Go to Tools -> Category List or Press (Ctrl + Shift + C)
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482. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

341. Install Quicken QW 2014 build 23.1.1.17
342. Launch Quicken
343. Open a data file with attachment uploaded to cloud.
344. Go to Edit -> Preferences -> Quicken cloud services
345. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

477. Install Quicken QW 2014 build 23.1.1.17
478. Launch Quicken
479. Open a data file with attachment uploaded to cloud.
480. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
481. Delete your cloud data.
482. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
483. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

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Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

69. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

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Attachments are getting deleting from cloud if user sign out and sign in as same user.

749. Install Quicken QW 2014 build 23.1.2.8
750. Launch Quicken
751. Add any manual checking account
752. Sync the account to cloud
753. Go to register
754. Attach an attachment
755. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
756. Sign out
757. Again sign as a same user
758. Go to register
759. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

681. Install Quicken Q2014 build 23.1.2.9
682. Launch Quicken.
683. Go to Planning-> Budget and create a new budget.
684. Go to annual view
685. Click on ‘Select categories to budget’ link at the bottom of the budget page
686. Select any category and Click OK.
687. Enter a transaction of $70 for Sep month
688. Enter $5 budget value and apply for all month
689. Turn ON 'rollover only positive value'
690. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

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2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

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622. Install Quicken Q2014 build 23.1.2.5
623. Launch Quicken.
624. Go to Planning-> Budget and create a new budget.
625. Go to annual view.
626. Select some categories.
627. Turn on rollover for any selected categories.
628. Edit the rollover value for any month
629. Turn off the rollover
630. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

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In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

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Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

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Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

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346. Install Quicken QW 2014 build 23.1.1.17
347. Launch Quicken
348. Open a data file with attachment uploaded to cloud.
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350. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

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488. Delete your cloud data.
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Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

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'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

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7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

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For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

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Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

760. Install Quicken QW 2014 build 23.1.2.8
761. Launch Quicken
762. Add any manual checking account
763. Sync the account to cloud
764. Go to register
765. Attach an attachment
766. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
767. Sign out
768. Again sign as a same user
769. Go to register
770. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

691. Install Quicken Q2014 build 23.1.2.9
692. Launch Quicken.
693. Go to Planning-> Budget and create a new budget.
694. Go to annual view
695. Click on ‘Select categories to budget’ link at the bottom of the budget page
696. Select any category and Click OK.
697. Enter a transaction of $70 for Sep month
698. Enter $5 budget value and apply for all month
699. Turn ON 'rollover only positive value'
700. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

631. Install Quicken Q2014 build 23.1.2.5
632. Launch Quicken.
633. Go to Planning-> Budget and create a new budget.
634. Go to annual view.
635. Select some categories.
636. Turn on rollover for any selected categories.
637. Edit the rollover value for any month
638. Turn off the rollover
639. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

491. Go to Planning-> Budget and create a new budget.
492. Go to annual view.
493. Select some categories from Auto & transport.
494. Go to Tools -> Category List or Press (Ctrl + Shift + C)
495. Go to Options -> Assign Category Groups.
496. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
497. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

351. Install Quicken QW 2014 build 23.1.1.17
352. Launch Quicken
353. Open a data file with attachment uploaded to cloud.
354. Go to Edit -> Preferences -> Quicken cloud services
355. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

491. Install Quicken QW 2014 build 23.1.1.17
492. Launch Quicken
493. Open a data file with attachment uploaded to cloud.
494. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
495. Delete your cloud data.
496. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
497. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
5. Go to Options -> Assign Category Groups.

6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

71. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

771. Install Quicken QW 2014 build 23.1.2.8
772. Launch Quicken
773. Add any manual checking account
774. Sync the account to cloud
775. Go to register
776. Attach an attachment
777. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
778. Sign out
779. Again sign as a same user
780. Go to register
781. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

****

Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

****

Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

701. Install Quicken Q2014 build 23.1.2.9
702. Launch Quicken.
703. Go to Planning-> Budget and create a new budget.
704. Go to annual view
705. Click on ‘Select categories to budget’ link at the bottom of the budget page
706. Select any category and Click OK.
707. Enter a transaction of $70 for Sep month
708. Enter $5 budget value and apply for all month
709. Turn ON 'rollover only positive value'
710. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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Actual result: - Quicken menu gets disappears

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Budget: Full path is not displayed in transaction pop-up for child category at L5 or L6.

Rollover icon get stuck and displayed always even after moving control to some another category.

Rollover icon should not be displayed when user moves the mouse or control to some another category. It gets removed when user again click on that category.

Please find the attached snapshot and video for better view.

640. Install Quicken Q2014 build 23.1.2.5
641. Launch Quicken.
642. Go to Planning-> Budget and create a new budget.
643. Go to annual view.
644. Select some categories.
645. Turn on rollover for any selected categories.
646. Edit the rollover value for any month
647. Turn off the rollover
648. Again turn ON rollover for same category

Actual result: Roll-over edited value is not getting reset when it is turned off.

Hi David,

In 2014, user cannot set the rollover amount or any access any menu at the top-level category if there are any subcategories in the budget.

For other scenario where rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible. I was able to reproduce this with the following steps:

498. Go to Planning-> Budget and create a new budget.
499. Go to annual view.
500. Select some categories from Auto & transport.
501. Go to Tools -> Category List or Press (Ctrl + Shift + C)
502. Go to Options -> Assign Category Groups.
503. Create Custom category group "Custom1" and add some categories from "Auto & Transport which are already budgeted above and click on "Done"
504. Now, perform click on any sub-categories.

Result: Rollover option, gear-menu, transaction pop-up and also right-click menus are not accessible.

For this, I have logged a defect and development team is looking into this issue.

Please let me know the exact steps if you are doing something else.

Thanks,

Sumit

Refresh: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

1. Install Quicken QW 2014 build 23.1.1.17

2. Launch Quicken

3. Press [Alt]+[I], then [T] then [F]

4. Verify that Portfolio analyzer dialog gets open

Actual: “Your best and worst performers” box is not displayed in portfolio analyzer when opened for the first time or after changing the setting.

Expected: “Your best and worst performers” box should be displayed.

356. Install Quicken QW 2014 build 23.1.1.17
357. Launch Quicken
358. Open a data file with attachment uploaded to cloud.
359. Go to Edit -> Preferences -> Quicken cloud services
360. Unlink your cloud data.

Actual: Menu and its icon are not getting updated on attachment mini-viewer and full-viewer after unlinking the cloud data.

Expected: When user unlinks the cloud data, menu and its icon should get updated on attachment mini-viewer and full-view.

When user unlinks the cloud data, menu and its icon is not getting updated on attachment mini-viewer and full-view.

498. Install Quicken QW 2014 build 23.1.1.17
499. Launch Quicken
500. Open a data file with attachment uploaded to cloud.
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502. Delete your cloud data.
503. Open QDF viewer and observe the cloud location in Attachment metadata -> still the attachment path is displayed
504. Now, again sync the account to cloud.

Actual: If the cloud data is deleted and again sync is perform; attachments are getting uploaded to cloud.

Expected: Attachments should not get uploaded to could and should be saved locally.

'Everything else' is not displayed for custom category, If user budget any parent categories for custom and default category.

If user budget any parent categories say 'Auto & transport' for custom and default category. Then 'Everything else' is not displayed for custom category

Please find the attached video.

1. Install Quicken Q2014 build 23.1.2.5
2. Launch Quicken.
3. Go to Planning-> Budget and create a new budget.
4. Go to Tools -> Category List or Press (Ctrl + Shift + C)
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6. Create Custom category group "Custom1" and assign "Auto & Transport: Parking" & "Auto & Transport: Auto-Payment" to this group and click on "Done"

7. Click on "Select categories to budget" link at the bottom of the budget page

8. Click on "Custom1" category group

9. Select "Auto & Transport" category in "Personal Expenses" and "Custom1" category group and Click OK.

Actual: 'Everything else' is not displayed for custom category

Expected: 'Everything else' should be displayed for custom category

Verified the changes in build 23.1.2.5 and found that for one scenario i.e. when Quicken is closed in maximized state and property is set to minimize. Then, Quicken launches in maximized state.

As discussed with Jyoti, it is technically not feasible and same behavior is in Q2013 also. Hence, closing this defect.

Blank category column is displayed for Bill/Income reminder.

For Bill/Income reminder, blank category column is displayed.

After mouse-hover also, it is not getting displayed.

For MR build, it is working fine.

Please find the attached snapshot.

72. Install Quicken QW 2014 build 23.1.2.7
    2. Launch Quicken.
    3. Add any manual checking account.
    4. Create a Bill/Income reminder
    5. Go to register.

Actual result: - For Bill/Income reminder, blank category column is displayed.

Expected result: - For Bill/Income reminder, category should be displayed as it is displayed for entered transaction.

Attachments are getting deleting from cloud if user sign out and sign in as same user.

782. Install Quicken QW 2014 build 23.1.2.8
783. Launch Quicken
784. Add any manual checking account
785. Sync the account to cloud
786. Go to register
787. Attach an attachment
788. Go to Edit -> Preferences -> Intuit ID, Mobile & alerts
789. Sign out
790. Again sign as a same user
791. Go to register
792. Open attachment mini-viewer -> The attachment is not showing the cloud icon.

Actual: Attachments are getting deleting from cloud.

Expected: Attachments should not get deleted from cloud.

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Verified the changes in build 23.1.2.7 and found that default "Don't show reminder" option is set. Hence, closing this defect.

- Sumit K. [19 Sep 2013]

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Improper message is displayed for the attachment upload.

After the implementation of US1388.

If user attaches a file which is more than 5MB and after compression if the compressed size is less than 1 MB, than it gets uploaded.

And if user attaches a file which is less than 5MB and after compression if the compressed size is greater than 1 MB, than it does not get uploaded where we display a message **"Cannot upload the attachment as the size of attachment is greater then 5 MB."** Which seems to be incorrect or confusing for the user.

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712. Launch Quicken.
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714. Go to annual view
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716. Select any category and Click OK.
717. Enter a transaction of $70 for Sep month
718. Enter $5 budget value and apply for all month
719. Turn ON 'rollover only positive value'
720. Observe the ‘Summary balance’ column

Observation:

For parent/group category, the calculation for ‘balance summary’ is [budget (sum of all months) – actual (sum of all months)]

However, for child category December month balance is shown.

Expected: It should show December month balance in ‘Summary balance’ column

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

4. Minimize the Quicken

5. Right-click on Quicken icon in taskbar and close Quicken

6. Launch Quicken from taskbar → Quicken will get launched in minimized state

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Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

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6. Launch Quicken from taskbar → Quicken will get launched in minimized state

7. Maximize the Quicken

Actual result: - Quicken menu gets disappears

Expected result: - Quicken menu should not get disappear in any scenario.

1. Install Quicken QW 2014 build 23.0.0.146

2. Launch Quicken.

3. Resize the Quicken window

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