January 14ᵗʰ, 2016

UPGRADE NOTICE

Version 17.4B of Estate-a-Base® is now available to resolve the following issues in Version 17.4A:

- In the **Forms** tab, when printing the back sheet of a form from print preview, an error message appeared. In this version, the back sheet will be printed as expected.

- The **Value of Estate** fields in **Tab C** did not appear in the appropriate layout when the **Zoom in** feature was used. In this version, the fields all appear as expected.

- When generating documents in the **Tasks** topic, documents appeared for other records. In this version, only the selected documents for the current record appear.

- The **Local Assets Contacts Database** displayed local contacts from other records. In this version, the database displays the contacts for the current record only.

New Features in Version 17.4B

Updated Master Documents – We have updated several Master Documents by replacing the term **Court fees** with **Estate Administration Tax**. The documents are accessed from the following tasks:

- **Application for Certificate**

    - **l1-crt-t.app** (TESTATE – Letter to Court with applic'n, etc.)

    - **l1-crt-i.app** (INTESTATE – Letter to Court with applic'n etc.)

- **Undertaking Re Probate Fees**

    - **undertkg.utg** (Undertaking of Estate Trustees re probate fees)

    - **l-more$.utg** (Ltr to court & Affid. After inventory- $ PAYABLE)

    - **l-refd$.utg** (Ltr to court & Affid. After inventory- $ REFUNDABL)

    - **l_nil$.utg** (Ltr to court after asset inventory- NO ADJUSTMENT)

- [Click here](#) for instructions for importing these documents.

Probate Intake Form for WordPerfect – A WordPerfect version of the **Probate Intake Form**, named **probatequestionnaire.wpd**, is now available. (The Word version of the form was released in 17.4A.) Once the document is imported, access it from the **Go to** menu, print the form and fill it in with estate-related information. Click here for instructions for importing this document.

Importing New and Revised Master Documents

To access new and revised documents, **you must first upgrade to version 17.4B** and then import them, as follows:

- Click **Updates** > **Import selected master documents from DPS_MAST.ZIP**.

For Documents with the Estate Administration Tax **Terminology:**

- In the **Import Selected Master Documents** > **Masters** box, locate the required documents, double-click each one for tagging, click **Proceed [F2]** and confirm the import.

For the WordPerfect Probate Intake Form:

- In the **Import Selected Master Documents** box, click **$INCLUDE$**, double-click **probatequestionnaire.wpd** to tag it, click **Proceed [F2]** and confirm the import.

Need Help Upgrading?

All users must log out of **Estate-a-Base** during the upgrade. Then the Default user goes to **Configuration > Live Upgrade > [Check for Update]** and follows the installation directions. If you require further assistance, contact Customer Service at 1.866.367.7648 or inquiries@doprocess.com.