

July 4<sup>th</sup>, 2016

## UPGRADE NOTICE

Estate-a-Base® Version 17.4C is now available for upgrade. This release includes updated documents and several fixes, including the following:

**Updated Court Form – Form 74.44 Notice of Application to Pass Accounts** has been updated.

- For this updated form, you are expected to attach a blank copy of Forms 74.45 and 74.45.1. Due to different PDF printing technologies used to generate the forms, a message will appear requiring you to confirm the generation and printing of Form 74.45.1 (named **Request for Service Empty**) before generating Form 74.44.

**Updated Master Documents** – The following Master Documents related to the **Application for Certificate** task have been updated and now include a reference to the death certificate in the list of documents:

- L1\_CRT-I.APP
- L1\_CRT-T.APP

To import these Master Documents, it is strongly recommended that you make a backup of the existing Masters folder (located at **C:\EST8BASE\MASTERS**, where **C** may be replaced by the letter for another drive). Then follow these directions:

1. Upgrade **Estate-a-Base** to version 17.4C (see the directions below).
2. Log in as a regular user.
3. Click **Updates > Import selected master documents from DPS\_MAST.ZIP**.
4. In the **Masters** tab, double-click the required documents (they are highlighted in green in the **CD-ROM Version** column), click **Proceed** and confirm the import.

**Inserting Attention Information** – The name entered in the **Attention** field of an **Edit Asset Contact** will appear in the **Name of Broker/Agent** field for Investments (i.e. for an **Investment Account Original Asset**) in the **Investments** section of the Estate Information Return form.

**Editing/Changing Name of Ledger/Proposed Distribution** - This fix enables the changing and the editing of the Ledger/Proposed Distribution name.

### Need Help Upgrading?

All users must log out of **Estate-a-Base** before 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](mailto:inquiries@doprocess.com).