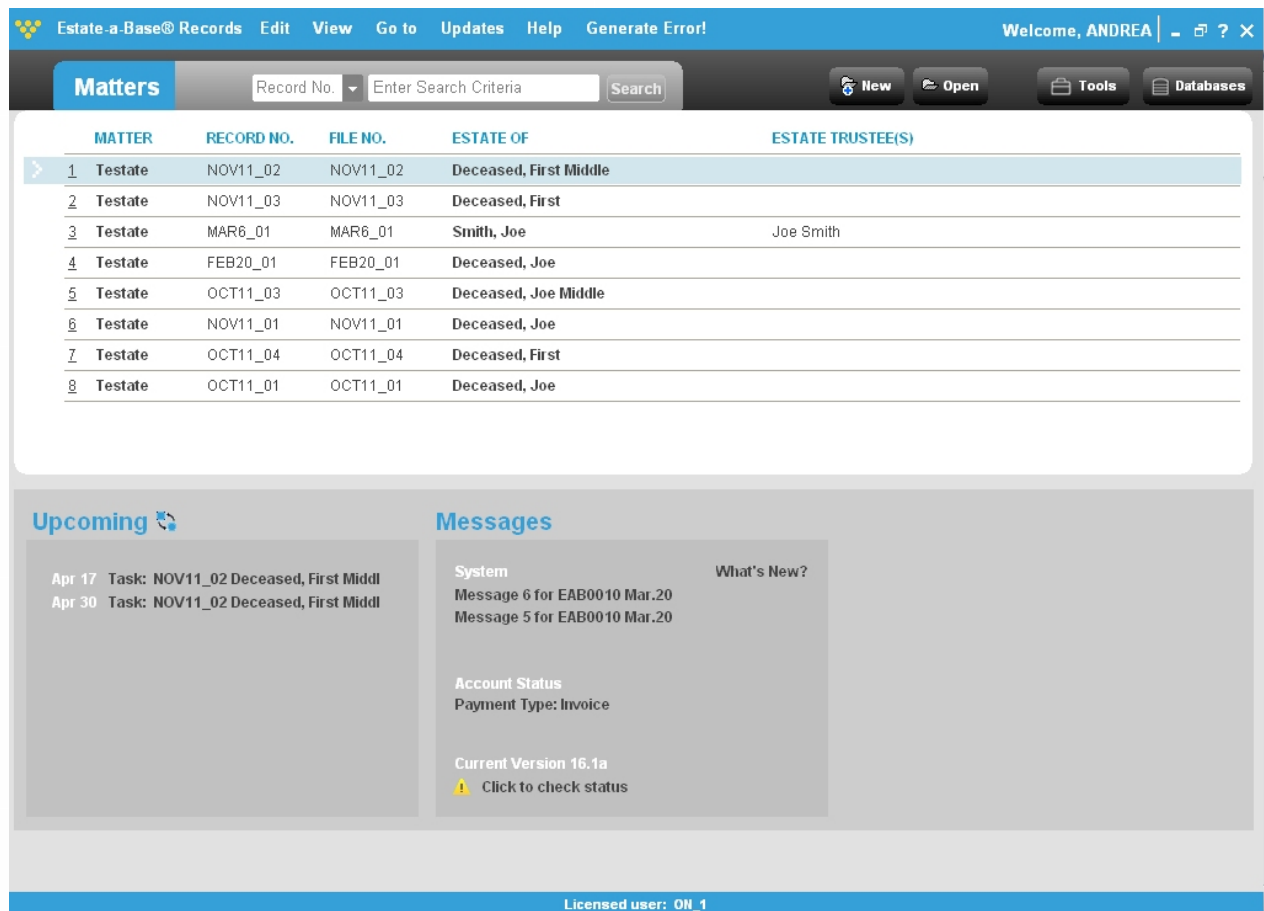# DO PROCESS
SOFTWARE

ESTATE-A-BASE®

April 17, 2014

UPGRADE NOTICE

Introducing the new sophisticated Estate-a-Base user interface in Version 16.1A, designed to help improve your workflow and create a consistent look and feel across all Do Process products. Please note the following changes.

- The **Login** page provides you with direct access to the Do Process website, valuable information in the Customer Resource Centre, announcements, the training calendar and legal terms and conditions for use of our software.

- The **Home** page provides multiple methods to locate records, see upcoming events and view messages.

- The tools that used to appear in the toolbar (such as Lists, Account Summary, etc.) are now neatly organized and can be accessed by clicking on [Tools] in the top right corner of the screen.

- Similarly, you can access the Secondary Databases from [Databases] in the top right corner of the screen.

- For easier access, the tabs for topics across the top of a record have been replaced with links to the topics in a panel on the left side of the open record.

- The **Ledger/Proposed Distribution** is a frequently used task. It has been removed from Tasks and now appears as a separate topic accessed from the **Ledg/Prop Dist** link in the left panel. All other functionality for this item remains the same.

- When a record is opened, a toolbar appears at the top of each topic with icons for commonly used actions:

  o Use these icons to save the record, add a sticky, access documents related to the record, access the calendar, zoom in and out, select a status for a topic (complete, incomplete or attention) and move from topic to topic.

  o **Topic Markers** have been replaced by the **Select Status** option.

- The **Configuration** page (accessed by the Default user only) has been redesigned for ease of use.

- The Polaris tab has been removed.

Special Note about Stickies and Topic Markers – Stickies and topic markers applied to records created in earlier versions of Estate-a-Base may move to another topic, particularly when they were applied to Court Forms. Please check these items carefully.

Easier identification of documents generated in **Tasks**. The name or abbreviation of the master document has been added as a prefix to reflect the contents of the document.

- For example, in the fax cover sheet to the accountant, instead of naming it "T3.2" (for task #3, second document), the document is named "fax-T3.2".

In **Court Form 74.7** (Notice of an Application for a Certificate of Appointment of Estate Trustee with a Will), the name of deceased beneficiaries will now appear in Section 10.

In the **Statement of Account** (accessed through **Tasks**), the F9 value for the Software Transaction Charge will always reflect the charges appearing in the Pay-per-Use Status box in Tab A.

For a client identified with gender "Other (charitable") or "Other (noncharitable)" and as Named Trustee and Estate Trustee with a different name in the Will, the full name appears in Court Form 74.5 > Affidavit > "Name of corporate applicant" field (i.e. **The New Charity (referred to in the will as The Old Charity)**).

There is a change in the behaviour of the combination fields in **The Application** topic:

- **N/y** in the topic field appears as "No" in the Court Forms.

- **Y/n** in the topic field appears as "Yes" in the Court Forms.

- **???** in the topic field appears as "N/A" in the Court Forms.

  o If you click in one of these fields you are required to select either "Yes" or "No".

Estate-a-Base is now fully compatible with Microsoft® Office 2013 and Microsoft Office 365 (desktop version).

- Microsoft has announced that it will no longer support Microsoft Windows® XP and Microsoft® Office 2003 as of April 8th, 2014. As a result, we strongly advise you to upgrade your operating system and word processor quickly to ensure the data in your office remains secure.

- We will continue to provide support for all Do Process applications running on Windows XP and Office 2003 until December 31st, 2014. After that date, we will only support Microsoft Windows 7, 8 or 8.1, Microsoft Office 2007 and 2010, and Corel® WordPerfect® X5 and X6.

Need Help Upgrading?

Visit the [Customer Resource Centre](#) for instructions or contact Customer Service at 1.866.367.7648 or [inquiries@doprocess.com.](#)