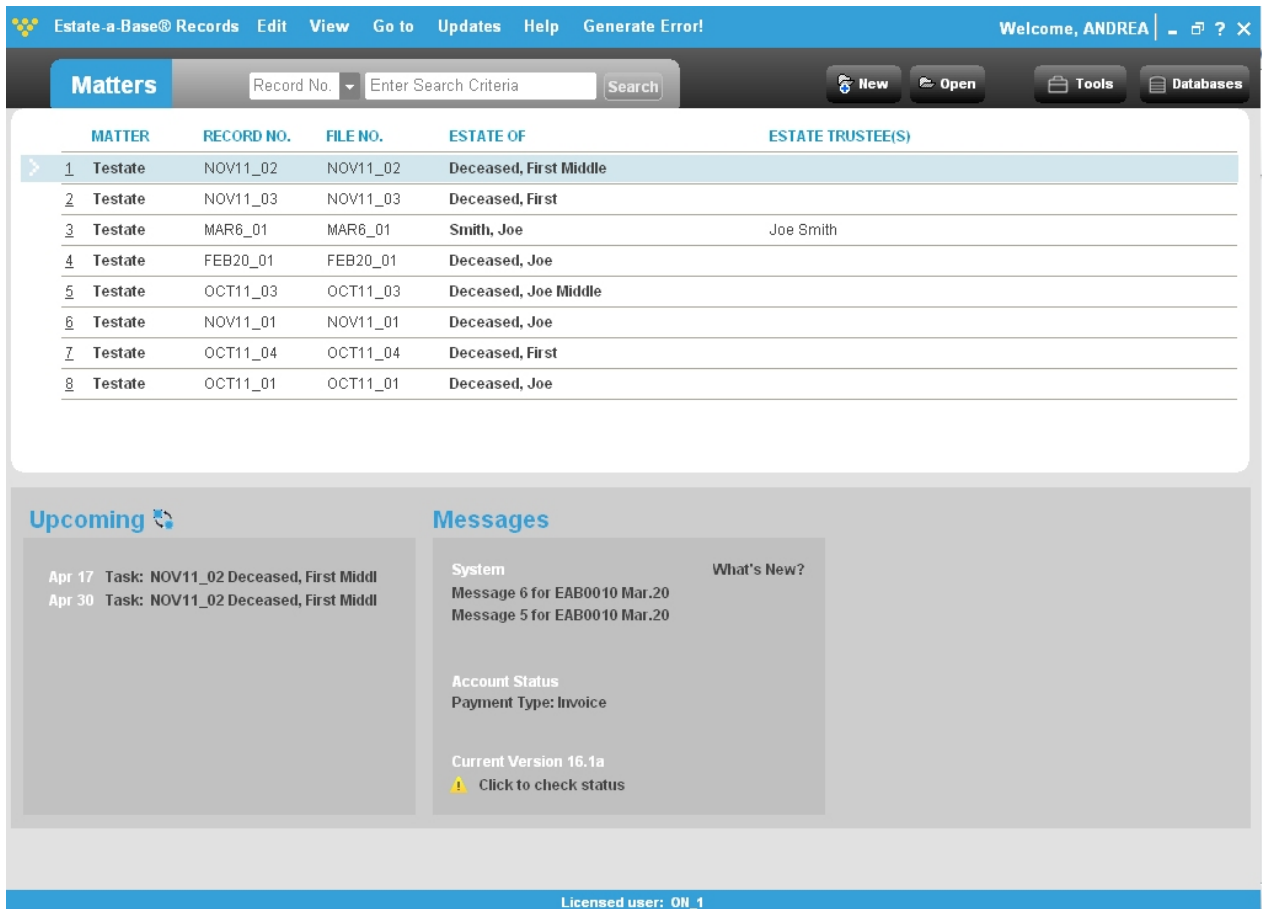


June 9, 2014

## UPGRADE NOTICE

Introducing the new sophisticated look of Estate-a-Base, now available in Version 16.1C. 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 screenshot shows the Estate-a-Base software interface. At the top, there is a navigation bar with the following items: Estate-a-Base® Records, Edit, View, Go to, Updates, Help, Generate Error!, and a user greeting: Welcome, ANDREA. Below the navigation bar is a search area with a dropdown menu for 'Record No.', a text input field for 'Enter Search Criteria', and a 'Search' button. To the right of the search area are buttons for 'New', 'Open', 'Tools', and 'Databases'. The main content area features a table with the following columns: MATTER, RECORD NO., FILE NO., ESTATE OF, and ESTATE TRUSTEE(S). The table contains 8 rows of data, all with 'Testate' as the matter type. Below the table, there are two sections: 'Upcoming' and 'Messages'. The 'Upcoming' section shows two tasks: 'Apr 17 Task: NOV11\_02 Deceased, First Middl' and 'Apr 30 Task: NOV11\_02 Deceased, First Middl'. The 'Messages' section shows a 'System' message titled 'What's New?' with two messages: 'Message 6 for EAB0010 Mar.20' and 'Message 5 for EAB0010 Mar.20'. Below the messages, there is an 'Account Status' section with 'Payment Type: Invoice' and a 'Current Version 16.1a' section with a warning icon and the text 'Click to check status'. At the bottom of the interface, there is a blue bar with the text 'Licensed user: ON\_1'.

MATTER	RECORD NO.	FILE NO.	ESTATE OF	ESTATE TRUSTEE(S)
1 Testate	NOV11_02	NOV11_02	Deceased, First Middle	
2 Testate	NOV11_03	NOV11_03	Deceased, First	
3 Testate	MAR6_01	MAR6_01	Smith, Joe	Joe Smith
4 Testate	FEB20_01	FEB20_01	Deceased, Joe	
5 Testate	OCT11_03	OCT11_03	Deceased, Joe Middle	
6 Testate	NOV11_01	NOV11_01	Deceased, Joe	
7 Testate	OCT11_04	OCT11_04	Deceased, First	
8 Testate	OCT11_01	OCT11_01	Deceased, Joe	

**Upcoming**

- Apr 17 Task: NOV11\_02 Deceased, First Middl
- Apr 30 Task: NOV11\_02 Deceased, First Middl

**Messages**

**System** What's New?

- Message 6 for EAB0010 Mar.20
- Message 5 for EAB0010 Mar.20

**Account Status**


Payment Type: Invoice


**Current Version 16.1a**

⚠ Click to check status

Licensed user: ON\_1




- 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  in the top right corner of the screen.

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

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



- 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.
- **Topic Markers** have been replaced by the **Select Status** option.
- To assist you in locating documents generated for a record and to provide a convenient method to open documents in your word processor, we have added the DP Filer feature. It can be accessed from  in the toolbar
  - Documents generated in Tasks, Original Assets and Liabilities will appear in the list with a description of each document for further clarification.
  - Note that renamed documents or documents added manually to the ...\\DOCS\\<Filename> folder **will not be displayed in the DP Filer**.
- 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".
- 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.

 **ESTATE-A-BASE®**

- 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.

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.
  - 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](mailto:inquiries@doprocess.com).