

March 9, 2015

## UPGRADE NOTICE



### Introducing the Estate Information Return Form in Version 17.1A

We are pleased to announce that the **Estate Information Return** form is now available in **Estate-a-Base** Version 17.1A. **Estate-a-Base** simplifies the preparation of this complex form by populating the appropriate fields with data from the record and automatically calculating the estate asset values.

- Access this time-saving feature in the **Forms** topic > **Ministry of Finance** button > **9955E Estate Information Return**.
- Two new categories were added to the **Original Assets** topic to support this feature:
  - **Vehicles and Vessels** with options for car, truck, motorcycle, etc.
  - **Other Property** with options for business interests, copyright, patents, etc.
- Changes were made to the **Real Estate Original Asset** category:
  - Addition of **Roll Number** and **PIN Number** fields.
  - The **Value to Estate at Date of Death** field contains a breakdown of the real estate value.
- When you access the form, you will see that the data entry screen contains a portion of the entire form. Once generated, the entire form will be visible.
  - **Section A Information about the Certificate of Appointment of Estate Trustee** and **Section I Summary of All Estate Assets** appear in the data entry screen.
  - The data entry screen contains an option to indicate if the form is an **Amended Return**. If you choose this checkbox, fields are provided for you to indicate why it is being changed.
  - Changes to most fields in the form should be made directly in the appropriate topics and not in the data entry screen.

- To generate the form, click **View/Print PDF**.
  - The form is saved in the \est8base\docs\\PDF folder. You can also access this folder by clicking **Browse PDF Folder**.
  - The next time you generate this form in the same record, you will have the option to open the existing form, overwrite the existing form, or create a new one with a different name that you supply.
  - When additional estate trustees, properties, bank accounts, investments and vehicles/vessels are included in the record and do not fit in the main part of the generated form, extra pages are provided with this data.
- Note that the **Court Forms** topic was renamed **Forms** in Testate and Intestate records.

## General Enhancements

**Increase Working Space** – Minimize the navigation panel on the left side of the record, to increase the space within the record. When the panel is minimized, tab letters only will be displayed. Click  to minimize and  to maximize the panel.

**Improved Resources in the Do Process Help Centre** – The online Help Centre provides access to support and training materials 24/7 for your convenience. From the Help Desk you can open a request and interact with live agents during business hours. The new system efficiently expedites and manages requests for even faster resolutions.

- On the **Home** Page, click [Help Centre](#) to access valuable material about **Estate-a-Base**.
- In the **Tasks** topic, click [Letterhead Request](#) or [Master Document Request](#) to access the appropriate form. Remember to attach samples.

**Help File Update** – As of Version 17.1A, only the Help file (accessed from **Help > Contents** and **Help** buttons throughout the program) will be updated. The User's Guide will no longer be updated as it contained identical information to the Help file.

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