September 17, 2018

UPGRADE NOTICE

NoticeConnect Integration in Estate-a-Base

We are pleased to announce the integration of NoticeConnect® in Estate-a-Base® Version 20.3B. This simple, cost effective and court-approved approach enables lawyers and law clerks working on estate files to publish and create Notices to Creditors and Knowledge of Will Notices directly within Estate-a-Base.

You are now able to publish and create Notices to Creditors and Knowledge of Will Notices directly within Estate-a-Base. This new integration makes it even easier to post that notice that you might have thought twice about posting in the past.

- Publish legal notices at a fraction of the cost and to a wider geographical area compared to traditional newspaper ads. For less than $150, notices published on NoticeConnect are shared on social media, sent to subscribers, and easily found by creditors regardless of their location using online search engines such as Google
- Save time and eliminate duplicate data entry by using the client information already entered into Estate-a-Base
- Reduce both legal liability and estate trustee liability from outstanding creditors

To get started, all you need are NoticeConnect credentials for the lawyer or law clerk working on the estate file. Click here to create NoticeConnect credentials. If you already have NoticeConnect credentials, simply enter those in your staff profile on the **NoticeConnect Login Info** tab.

Note that this tab has replaced the **Do Process Login Info** tab, which is no longer required.

Refer to the Quick Reference Guide for instructions for using this new integration and to the FAQ for additional information.

DO PROCESS SOFTWARE

ESTATE-A-BASE®

Webinars

If you're interested in learning how to get the most out of this new integration, sign up for one of our complimentary webinars:

- Tuesday September 25th at 11 a.m.
- Thursday October 11th at 11 a.m.

Fix for Broadcast Messages

After upgrading, you will be able to receive broadcast messages and view messages previously sent (from **Go to** menu > **Do Process Message Manager**).

Statement of Account Updates

Including NoticeConnect Items in Statement of Account – Line items have been added to the **Statement of Account** (accessed from **Tasks**) for **Notice to Creditors** and **Notice of Knowledge of a Will**. Clicking **F9** in the **Amount** cell for these items displays the value for the published notice in Tab B.

- If the lines do not appear, the Default user can add them in **Configuration > Statement of Account > Disbursements – Subject to HST** by clicking **NC Lines**. Note that the **F9 Default Amount** should never be included in this Disbursements box, since the value is accessed from Tab B once you have posted and published a notice.

Fix for Software Transaction Fee – The **Software Transaction Fee** in the **Statement of Account** now reflects the amount calculated for the Estate Administration and/or Estate Accounting validation in Tab A.

Fixes for Forms

Referencing Hamilton and Brantford - When the **City of Hamilton in the Province of Ontario** or **City of Brantford in the County of Brant** is entered in the **Jurisdiction** field in Tab B, then **City of Hamilton** or **City of Brantford** appears in the **county or district** field in Forms 74.4., 74.5, 74.14, 74.15 and 74.30. This field is editable.

Form 74.19 – The name of the person consenting is saved and displayed under the signature line in Print Preview and PDF Conversion.

DO PROCESS SOFTWARE

ESTATE-A-BASE®

Unlinking Forms 74.49.4 and 74.45 - You are no longer required to create **Form 74.45 Notice of objection to accounts** before **74.49.4 Reply to Notice of Objection to Accounts**.

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)