

LegalEase – Deceased Estates Release Notes: Version 16.3t

20221023 - v16.3t

The merging of the Word-based custom letters have been improved. If you, however, after reading this document, you wish to revert to the previous method of merging the custom letters then refer to the last page of this document.

If your letterhead is a DOCX or DOTX file and the custom letter document you select under “Print Docs” is a DOCX file then LegalEase uses a new quicker way of merging the generating (i.e. filling in) the document template. This new method doesn’t require Word to be present on the PC (or terminal server (TS) host) you are working from. Any word processing software that can open a DOCX file can be used to view the output .DOCX file that LegalEase produces.

This new method also overcomes the requirement to have **32-bit** Microsoft Office on your PC (or TS host) as opposed to **64-bit** Office (if your version number of Windows is lower than Windows 11, that is).

After the v16.3t update you may notice additional / updated .DOCX files in your LETTERS folder. With this update LegalEase does not overwrite your existing templates, but adds additional .DOCX templates (if a file by that name doesn’t already exist).

AFTER v16.3s update: additional standard custom letters may have been added to your LESTATES\LETTERS folder

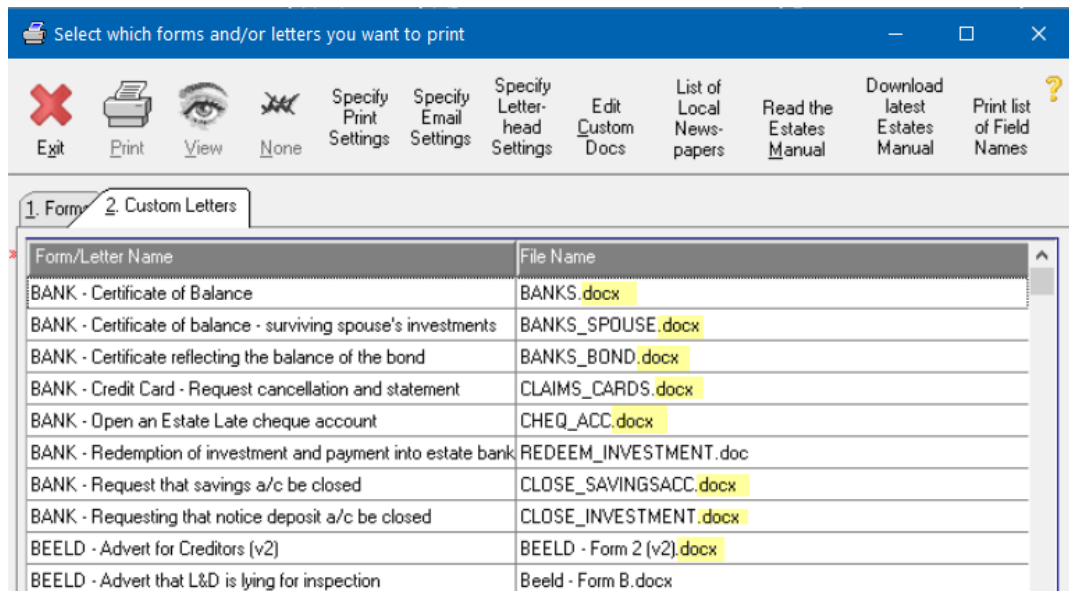
Name	Date modified	Type	Size
BROKER.docx	2022-10-21 4:39 ...	Microsoft Word D...	14 KB
BROKER.doc	2004-09-21 2:18 ...	Microsoft Word 9...	20 KB
Belasting - Uitklaring.docx	2022-10-21 6:39 ...	Microsoft Word D...	22 KB
Belasting - Uitklaring.doc	2004-09-22 12:1...	Microsoft Word 9...	20 KB
Belasting - Uitklaring belastingbetaler.docx	2022-10-21 6:38 ...	Microsoft Word D...	22 KB
Belasting - Uitklaring belastingbetaler.doc	2004-09-22 12:1...	Microsoft Word 9...	21 KB
Belasting - SARS OPGAWWE.docx	2022-10-21 6:36 ...	Microsoft Word D...	22 KB
Belasting - SARS OPGAWWE.doc	2004-09-22 12:1...	Microsoft Word 9...	20 KB
Beeld - Form B.docx	2022-10-21 4:39 ...	Microsoft Word D...	16 KB
Beeld - Form B.doc	2004-09-21 2:17 ...	Microsoft Word 9...	26 KB
Beeld - Form A.docx	2022-10-21 4:39 ...	Microsoft Word D...	16 KB
Beeld - Form A.doc	2004-09-21 2:14 ...	Microsoft Word 9...	25 KB
Beeld - Form A (v2).docx	2021-09-23 9:22 ...	Microsoft Word D...	16 KB

NOTE:

.DOC refers to the old Word file format generally used prior to Word 2006.

.DOCX refers to the new standard format of Word in use today.

Now, after you click “Print Docs” and you select a custom letter and click “View”: If a .DOC file was previously specified as the filename of the custom letter, Legalease will automatically check to see if there is a DOCX version of the file (present in the LETTERS folder) and then uses the DOCX file (as displayed on the list of “Custom Letters”) instead of the .DOC version when it when it does the merging/filling in of the custom letters.



You will notice (as shown above) that LegalEase displays the DOCX version of the custom letter filename in the “File name” column even though under “Edit Custom Docs” a .DOC file was specified as the filename. This is because is trying to use the improved “.DOCX” file instead of the older “.DOC” file. This is to speed up and improve the filling in of the letter.

Legalease will produce the filled in Word document and save it into the estate’s document repository in a fraction of the time it would previously take to produce it. You will notice LegalEase doesn’t load Word in the process of producing the output document.

If you had existing .DOC files that you customised and would like to retain: you can open the .DOC file in Word and save it as a DOCX file (replacing the DOCX template file that LegalEase has placed in your LETTERS folder). Be careful not to save it as a .DOC.DOCX file. It must be saved as a DOCX file (e.g. “INSTRUCT.DOCX” and NOT “INSTRUCT.DOC.DOCX”).

If you want to use one of the new standard Legalease letter templates to replace a DOCX file that you have edited/customised yourself you can delete the file you want to abandon from the LESTATES\LETTERS folder and then copy the appropriate DOCX file from the LESTATES\LETTERS\LETTERS-CACHE folder.

LETTERS-CACHE contains updated DOCX versions of all the standard letter templates

tes > LETTERS > LETTERS-CACHE

Name	Date modified	Type
INSPOLICY2.docx	2022-10-21 5:29 ...	Microsoft Word Document
INSTRUCT.docx	2022-10-21 5:29 ...	Microsoft Word Document
INSTRUCT_CONVEY.docx	2022-10-21 5:36 ...	Microsoft Word Document
INSTRUCT_CONVEY_DEEDS.docx	2022-10-21 5:40 ...	Microsoft Word Document
Koerant - Plaas advertensie.docx	2022-10-21 5:48 ...	Microsoft Word Document
Krediteur - Balans.docx	2022-10-23 7:50 ...	Microsoft Word Document
Krediteur - Mediese Kostas.docx	2022-10-23 7:52 ...	Microsoft Word Document
Krediteur - Mediesefonds.docx	2022-10-23 7:55 ...	Microsoft Word Document
L&D TO MASTER.docx	2022-10-23 7:49 ...	Microsoft Word Document

Word merge **Fillin fields** are **no longer supported**. These have been replaced by “content controls” imbedded in the document which show you where manual input is required:

The Receiver of Revenue
Click here and type name and address of SARS office.

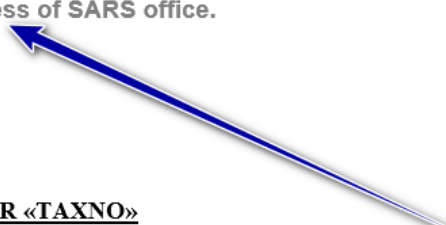
Dear Sirs

ESTATE LATE «DECEASED»
INCOME TAX REFERENCE NUMBER «TAXNO»

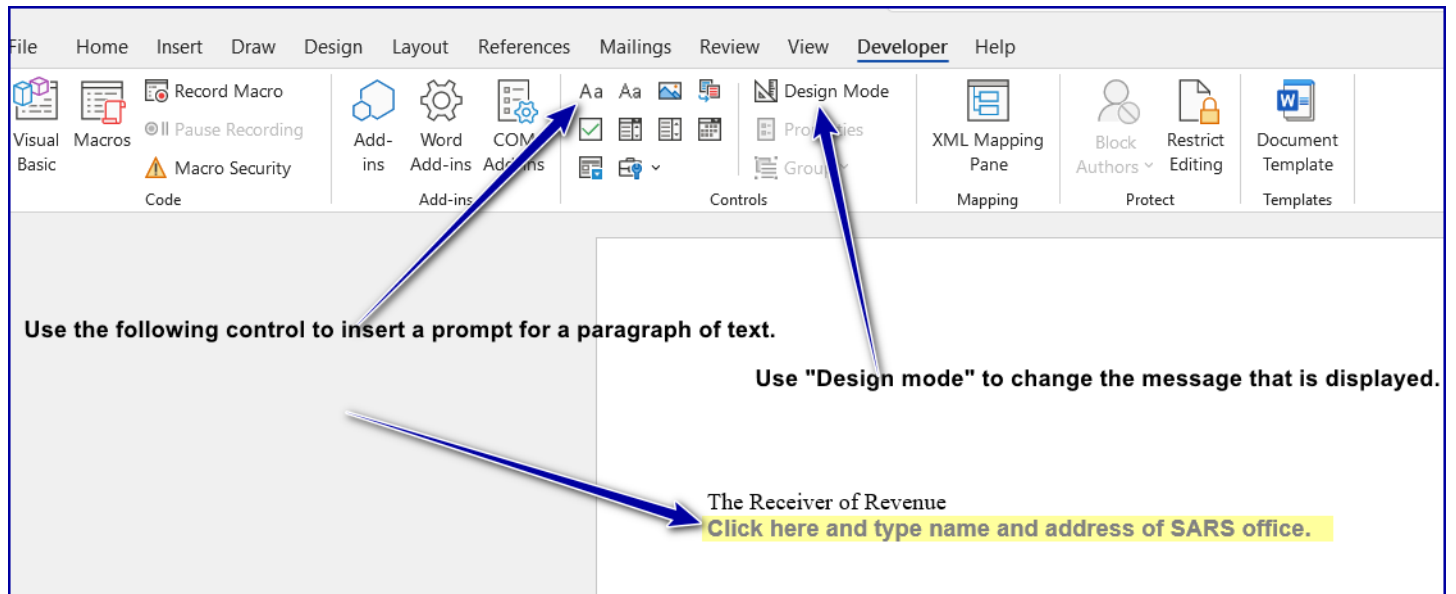
In reporting the death of the deceased to you, please find attached the following:

1. Copy of Death Certificate
2. Copy of Death Notice
3. Copy of Inventory
4. Copy of Will.

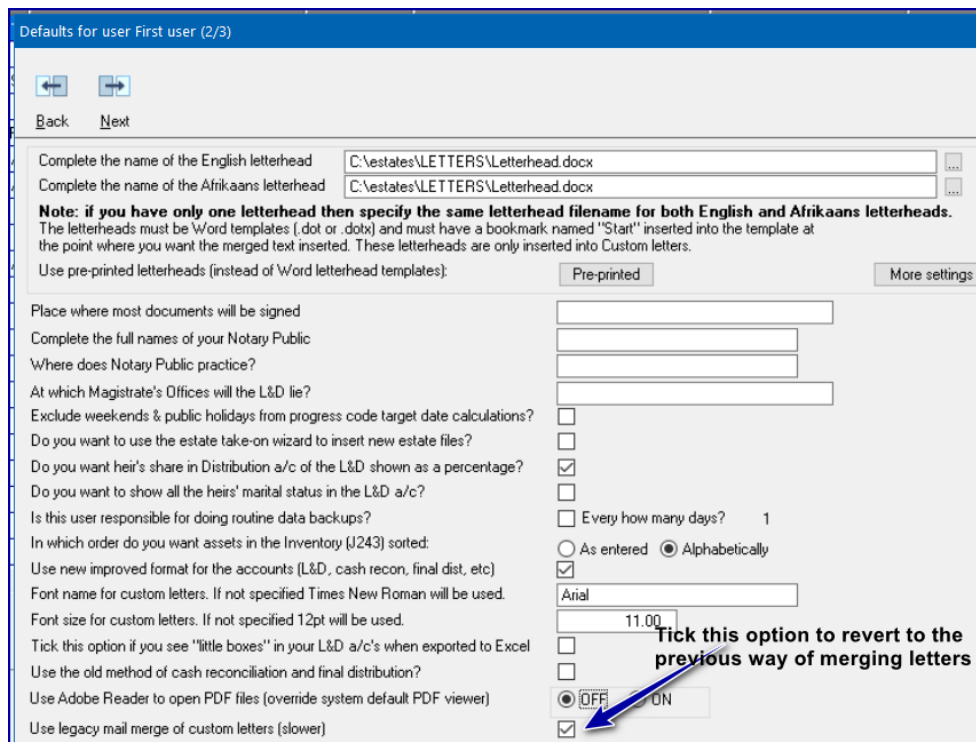
Please furnish us with your requirements to enable us to obtain a tax clearance certificate.



The “content controls” can be found on the “Developer” ribbon in Word.



If you want to override the new way LegalEase merges the custom letters (and revert to the previous, slower method and revert to the .DOC version of the document templates) there is a option on the 2nd page of “Defaults” to switch this new method/behaviour off:



You may have to use the above option to turn off the new way of merging IF a) you are using an older version of Word (i.e. Microsoft Office) that cannot read the completed Word document or b) if your letterhead template is non standard and no longer works properly after being generated by LegalEase or c) you have customised most or all of the .DOC letter templates and don't have time now to convert these to .DOCX.