

LegalEase – Deceased Estates Release Notes: Version 16.5 – 16.5t

20230718 - v16.5

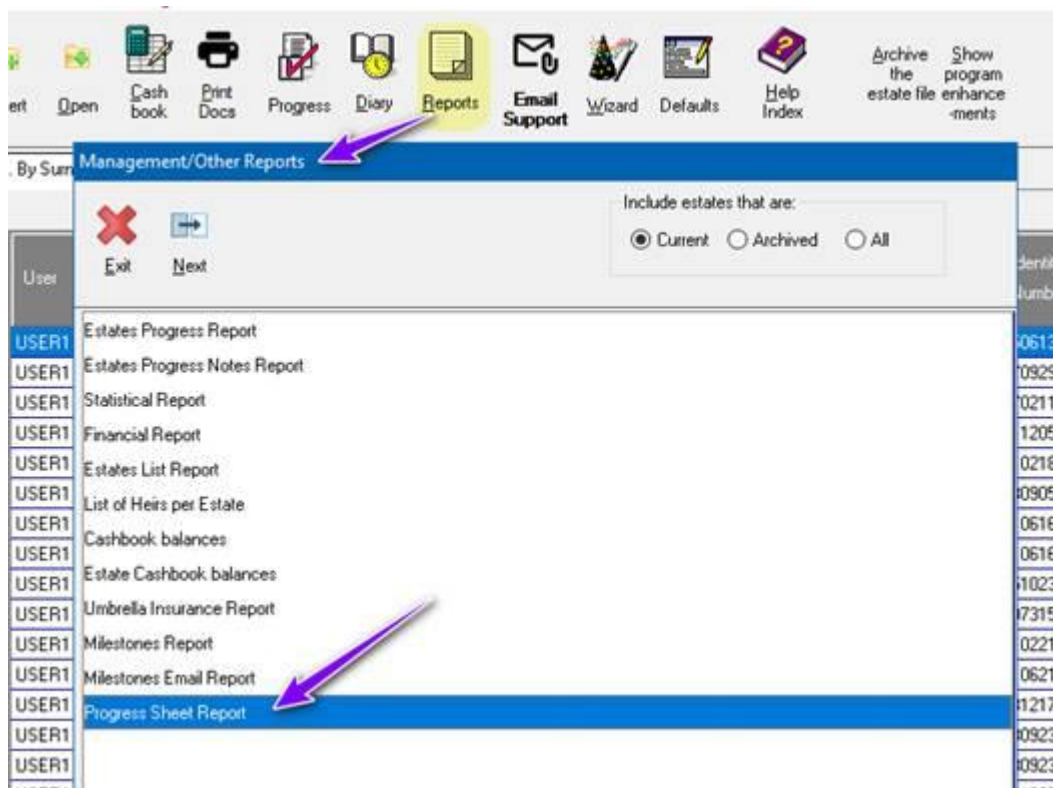
L&D a/c / Estate Duty / Account 3: Total of Account 3 when Intestate+Foreign Assets+COP fixed.

Remove certain unnecessary prompts/messages.

20230801 – v16.5a

- Importing LEE files into LegalEase. Improvements to eliminate duplicate error messages that sometimes occur when the LEE file is being read in.
- Improvements to the "Progress Sheet Report" under the "Reports" button (the last report on the list of reports).

We improved the "Progress sheet report" under "Reports" to eliminate the error that occurs on some computers. The "Share" sends the report output to an Excel file and opens it in Excel.



Progress sheet of estates taken on from 2020-08-01 to 2023-08-31

Exit Share

Administrator	Surname	Inits	Take on date	L&D Account	Report the estate to the Master	Receipt of Letters Of Executorship	Adv
FIRST USER	[REDACTED]	CAT	26/05/2022				
FIRST USER	[REDACTED]	MM	4/08/2021				
FIRST USER	[REDACTED]	LA	14/04/2021				
FIRST USER	[REDACTED]	SP	11/10/2021				
FIRST USER	[REDACTED]	H	14/05/2021				

Administrator	Surname	Inits	Take on date	L&D Account	Report the estate to the Master	Receipt of Letters Of Executorship	Adv
FIRST USER	[REDACTED]	CAT	2022/05/26				
FIRST USER	[REDACTED]	MM	2021/08/04				
FIRST USER	[REDACTED]	LA	2021/04/14				
FIRST USER	[REDACTED]	SP	2021/10/11				
FIRST USER	[REDACTED]	H	2021/05/14				
FIRST USER	[REDACTED]	JJP	2022/03/29				
FIRST USER	[REDACTED]	DMP	2021/07/22				
FIRST USER	[REDACTED]	JJDW	2022/02/28				
FIRST USER	[REDACTED]	MJ	2020/08/19				
FIRST USER	[REDACTED]	G	2021/03/31				
FIRST USER	[REDACTED]	EF	2021/07/01				

20230906 v16.5b

L&D a/c: Duty calculation involving foreign assets.

Added bank acc no column to list of estate files.

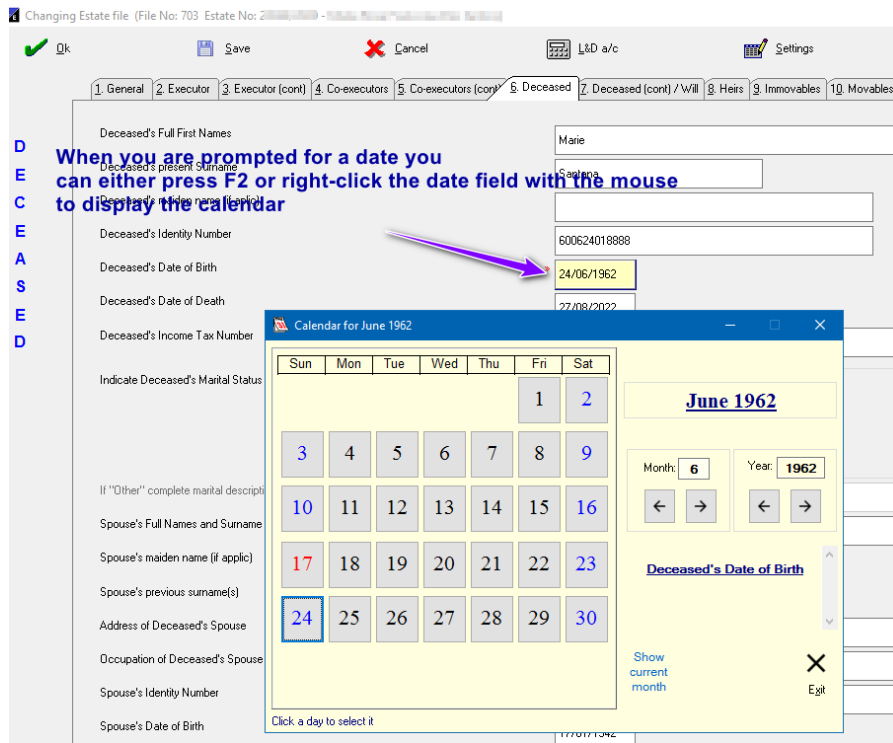
Exit Mailing List

Insert Open Cash book Print Docs Progress Diary Reports Email Support Wizard Defaults Help Index Archive the estate file Show program enhancements

1. By Surname 2. By File No 3. By Reference No 4. By Estate No 5. By Full Names 6. Archived

User	Surname	Initials	File No	Reference No	Estate No	Full name of deceased	Identity Number	Bank accounts	Estate Bank a/c no.	Estate Type	Last Progress Note
USER1	Rex	EE	618	USE 01E	E	E		FIRST AND FINAL (9/05/2019)	402377516	E/L	
USER1	Ribe	MA	257	M1E	653	M		FIRST AND FINAL (31/05/2012)			
USER1	RIS	CDR	248	259	253	C		FIRST AND FINAL (2/05/2012)			
USER1	Rob	H	511	E51	133	H		FIRST AND FINAL (17/07/2014)	0000302839607		
USER1	Rob	EM	434	MA1	84E	E		FIRST AND FINAL (5/12/2013)	9017724192		
USER1	ROE	NA	416	R20	211	N		FIRST AND FINAL (4/11/2013)			
USER1	ROE	PH	414	08R	28E	P		FIRST AND FINAL (22/05/2013)	052117359		
USER1	Rob	SF	620	MA1	004	S		FIRST AND FINAL (15/02/2020)	50015242940	Esa	
USER1	Ros	AD	157	R28	220	A		FOR DISTRIBUTION PURPOSES ONLY (13/0	1913436438		
USER1	ROS	GL	672	GR0	480	G		FIRST AND FINAL (20/10/2022), SUPPLEME			
USER1	Rup	J	693	UNI	03/	J		FIRST AND FINAL (16/04/2023)			
USER1	SAC	HHG	317		744	H		FIRST AND FINAL (12/09/2012)	1022867415		
USER1	SAL	JHW	125		170	J		FIRST (11/07/2011), SECOND & FINAL (19/0	9016674877		
USER1	Sam	D	373	Sam	16E	D		FIRST AND FINAL (31/07/2013)	070559325		
USER1	SAN	wC	638	H07	00E	w		FIRST AND FINAL (11/11/2021)	062109332	SIM	
USER1	San	M	703	DO5	220	M		FIRST AND FINAL (19/10/2021), SUPPLIMEN		DO5	
USER1	SAV	MB	226	MA1	13E	M		FIRST AND FINAL (1/02/2012)	4075011426		
USER1	Sav	A	191	S88	782	A		FIRST (14/07/2010), SUPPLEMENTARY (11/	1349150185		
USER1	SCH	HCG	208	07S	190	H		FIRST AND FINAL (23/11/2011)	9015963483		

Throughout the program you can press F2 or right-click any date entry field to select the date from the calendar.



20230913 V16.5c

Added “Estate Type” column to list of estates screen to show Intestate/Testate/Massed/Redist whichever is applicable.

Added “Notes” columns on the lists of assets (immovable, movables, claims, etc) screens.

Added “Will clause” to the list of asset (immovable, movables, claims, etc) screens.

Heirs screen, 3rd tab, In the case of Intestate with **redistribution agreement** the “Did this heir repudiate/renounce his intestate inheritance?” question is now available.

Power of attorney: the wording “hereby appoint” was cut off in certain cases.

2023-10-11 v16.5f

Internal improvements re: measures to reduce data corruption.

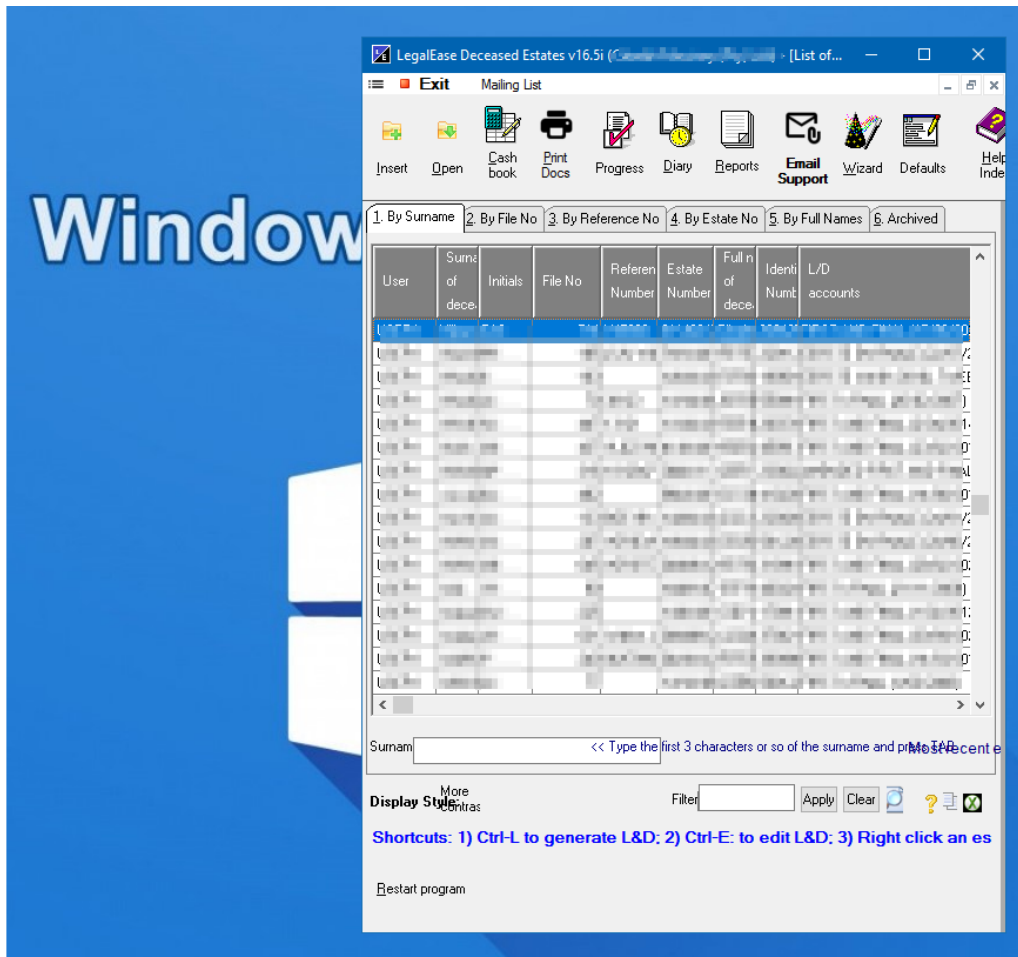
2023-10-11 v16.5f

L&D a/c: Account 3 total corrected where foreign assets/multiple accs/residue shortfall

2023-10-12 v16.5g

Caching of data to minimise redundant data reads (on list of estate files and cashbook screens)

LegalEase program main screen can now be tiled and resized.



20231013 v16.5h

Total of the portion of liabilities not allowed for duty purposes (SARS value less claim value) now subtracted from total liabilities in account 3 of duty calculation in L&D a/c

20231017 v16.5i

By default, LegalEase saves temporary files in a sub-folder of the USERS folder. So, if you log in as USER1 any temporary files created by LegalEase is saved in LESTATES\USERS\USER1.

If you are running the program over a WAN/VPN etc. and you want to improve performance by getting LegalEase to save the temporary files to your local disk instead of writing it to the network folder where the program is located, you can set the location for temporary files as follows:

Edit the INI file of the user (e.g. USER1.INI) and add the following UserDir parameter under the [General] section.

[General]
Userdir=x

Where x is the folder path to store the temporary files.

You can specify a specific folder path such as Userdir=C:\temp
OR

You can use Userdir=TEMP to store the files in your Windows default temporary folder.

You can use UserDir=DOCUMENTS to store the files that LegalEase generates to your documents folder C:\USERS. LegalEase will create a folder under your DOCUMENTS folder that corresponds to your LegalEase usercode (e.g. DOCUMENTS\USER1)

20231017 v16.5i

Performance improvement when generating L&D accounts (reduction in number of disk read operations). Performance gain may only be noticeable when generating L&D accounts for larger estates (where there are many data records for assets, heirs, cashbook entries, etc.) and in situations where LegalEase is run across a LAN/VPN/WAN. If you run the program locally or via a RDC (remote desktop connection) you may not notice much improvement in the time it takes to generate an L&D a/c.

20231023 - v16.5j

Income & Expenditure issues as a result of changes in v16.5i

20231024 - v16.5l L&D

a/c issue as a result of changes in v16.5i

20231026 - v16.5m/n

EDR / Acc 3 / liabilities now includes Foreign Liabilities

20231026 - v16.5o

EDR: Successive death rebate shown

20231030 - v16.5p

Next of Kin affidavit to print mother / father if no issue

20231114 - v16.5q/r/s

Acc 3 total

20231122 - v16.5t

Order of heirs in special bequests section of L&D a/c, Option on 2nd page of defaults to show in the L&D a/c each heirs portion (% or fraction) of each special bequest