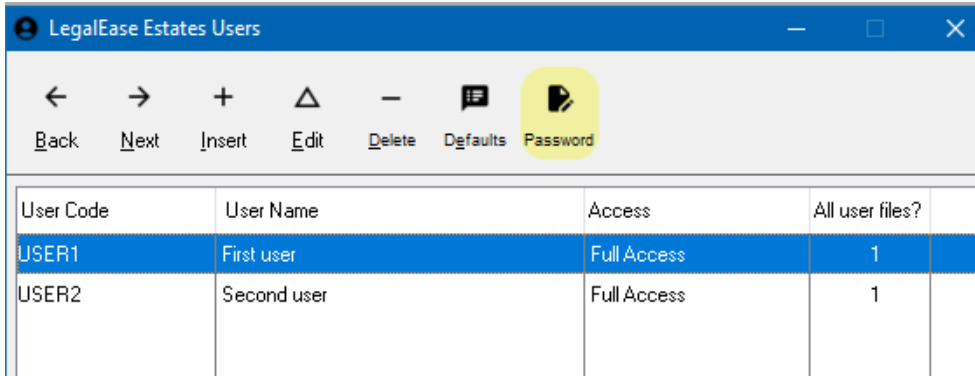


LegalEase – Deceased Estates Release Notes: Version 16.6 – 16.6g

20240207 - v16.6

1. Feature in the ADMIN area to **change user passwords**:



The screenshot shows a web application window titled "LegalEase Estates Users". At the top, there is a navigation bar with buttons: Back, Next, Insert, Edit, Delete, Defaults, and Password. The "Password" button is highlighted in yellow. Below the navigation bar is a table with the following data:

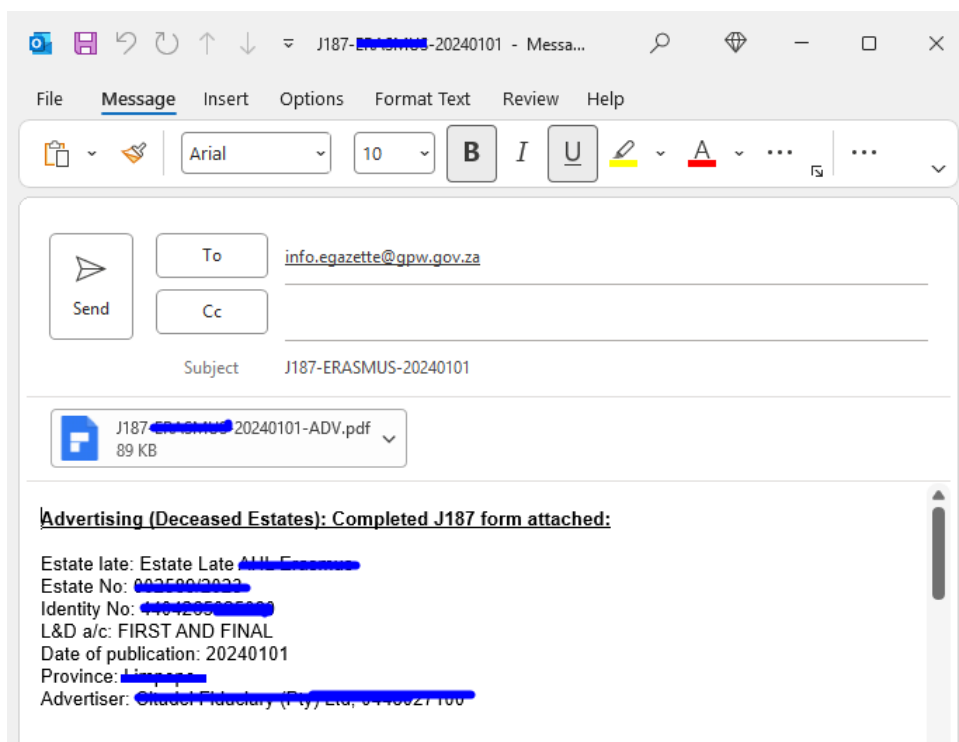
User Code	User Name	Access	All user files?
USER1	First user	Full Access	1
USER2	Second user	Full Access	1

Log in as ADMIN and specify the ADMIN password (if present) and then click “Users”. Highlight the user whose password you wish to change and then click “Password”.

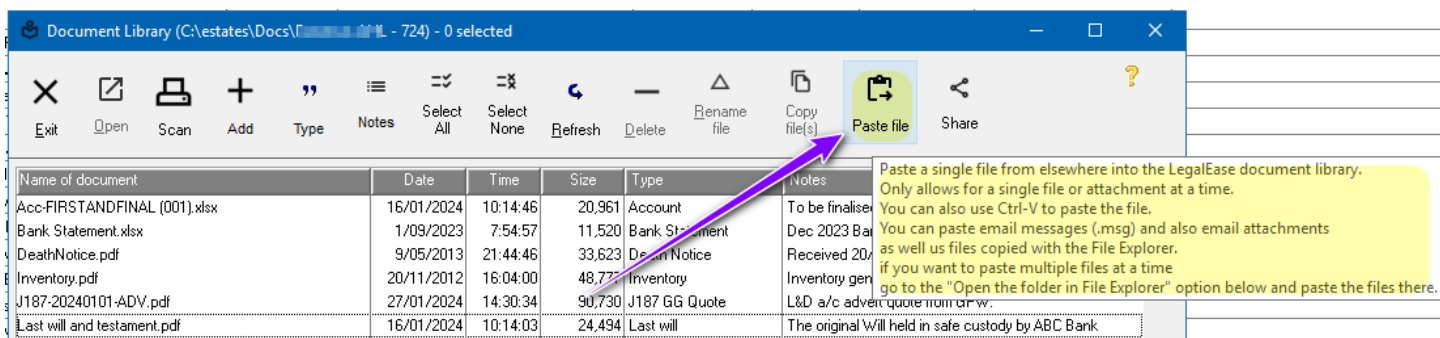
You will be asked to specify a “Password access key” to enable you to change a user’s password. You can obtain the key by calling 0317640528.

Thereafter you will be prompted to specify a new password and then also to confirm the password.

2. The process to obtain a quote for Govt Gaz advertising has reverted to sending an email to info.egazette@gpw.gov.za with the relevant J193 or J187 form attached. You send the quote request by selecting the “Advert – Govt Printer – L&D (quote)” or “Advert – Govt Printer – Creditors (Quote)” from the “Print Docs” in LegalEase. This will generate the J187 or J193 form and attach it to an email to the GPW.



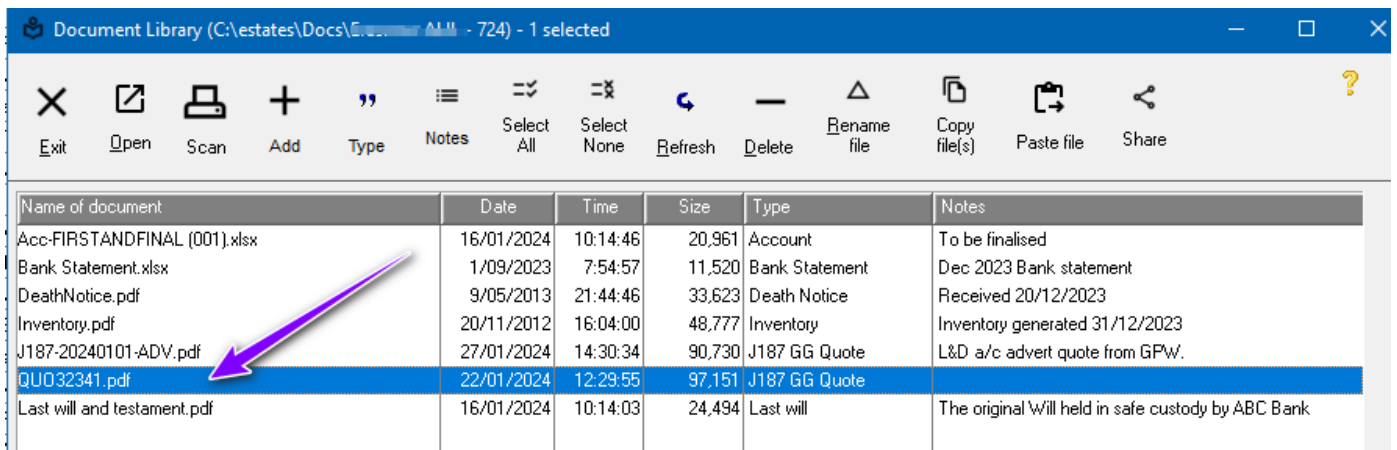
The GPW will reply with a quote.pdf attachment. You must then save the attached quote.pdf into your LegalEase document library. When you do this LegalEase will automatically check the PDF file contents and read the quote number, date of quote and cost of the advertisement from the PDF file and populate the fields on the "Advertising" tab of the L&D a/c screen. LegalEase will also rename the quote.pdf document to the quote number.pdf. For instance, if the quote number inside the PDF file is QUO12345 then the document will be renamed to QUO12345.pdf when you paste the document into the document library. To copy and paste the quote document (or any Outlook email attachment) you, in Outlook, click the attachment and select Copy from the pulldown list of attachment actions. Then go to the document library screen in LegalEase and click "Paste file" or press Ctrl-V.



Paste a single file from elsewhere into the LegalEase document library. Only allows for a single file or attachment at a time. You can also use Ctrl-V to paste the file. You can paste email messages (.msg) and also email attachments as well as files copied with the File Explorer. If you want to paste multiple files at a time go to the "Open the folder in File Explorer" option below and paste the files there.

Name of document	Date	Time	Size	Type	Notes
Acc-FIRSTANDFINAL (001).xlsx	16/01/2024	10:14:46	20,961	Account	To be finalise
Bank Statement.xlsx	1/09/2023	7:54:57	11,520	Bank Statement	Dec 2023 Ba
DeathNotice.pdf	9/05/2013	21:44:46	33,623	Death Notice	Received 20/
Inventory.pdf	20/11/2012	16:04:00	48,777	Inventory	Inventory gen
J187-20240101-ADV.pdf	27/01/2024	14:30:34	90,730	J187 GG Quote	L&D a/c advert quote from GPW.
Last will and testament.pdf	16/01/2024	10:14:03	24,494	Last will	The original Will held in safe custody by ABC Bank

If you paste a quote PDF file from the Govt Gaz into the document library LegalEase will automatically rename the file and identify it as a J187 or J193 quote document:



Name of document	Date	Time	Size	Type	Notes
Acc-FIRSTANDFINAL (001).xlsx	16/01/2024	10:14:46	20,961	Account	To be finalised
Bank Statement.xlsx	1/09/2023	7:54:57	11,520	Bank Statement	Dec 2023 Bank statement
DeathNotice.pdf	9/05/2013	21:44:46	33,623	Death Notice	Received 20/12/2023
Inventory.pdf	20/11/2012	16:04:00	48,777	Inventory	Inventory generated 31/12/2023
J187-20240101-ADV.pdf	27/01/2024	14:30:34	90,730	J187 GG Quote	L&D a/c advert quote from GPW.
QUO32341.pdf	22/01/2024	12:29:55	97,151	J187 GG Quote	
Last will and testament.pdf	16/01/2024	10:14:03	24,494	Last will	The original Will held in safe custody by ABC Bank

Even if the PDF document you are pasting or adding into the document library is not named "quote.pdf", LegalEase should identify it as a quote from the GPW and rename it and update the advertising details in the L&D a/c screen.

Note if the “GPW Quote No” in the L&D a/c screen does not have a matching PDF document (e.g. QUO32341.PDF) in the document library then LegalEase will not be able to attach the quote document to the email to GPW to advertise the L&D a/c or creditors advertisement.

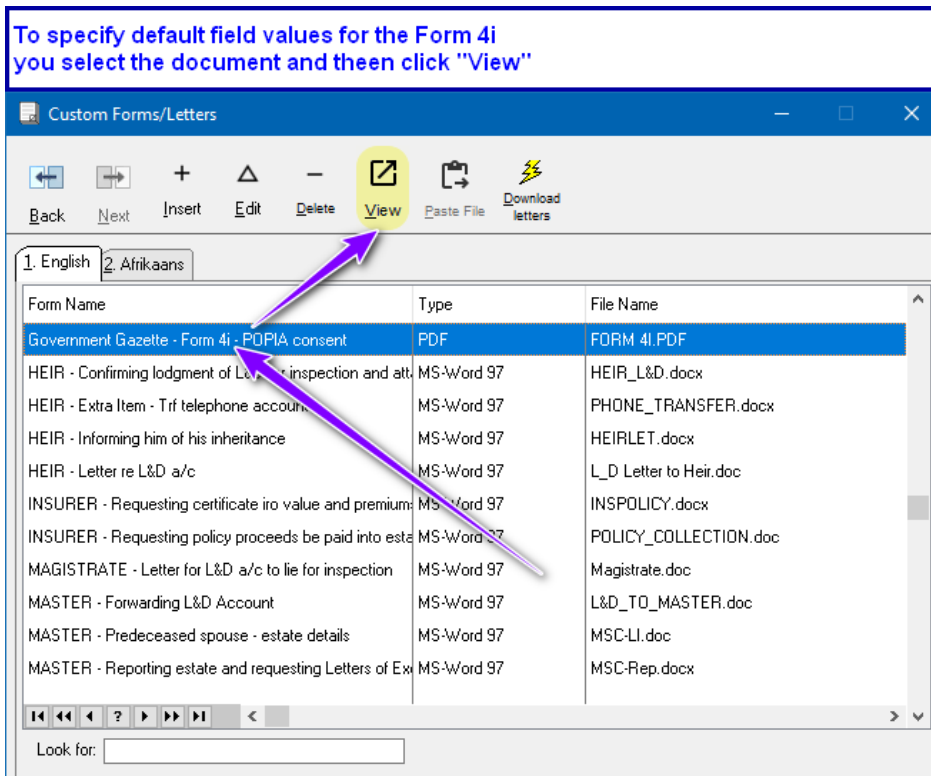
3. In compliance with the GPW POPIA requirements as stated on their website:

Dear Valued customer

IMPLEMENTATION OF POPIA COMPLIANCE IN THE PUBLISHING OF GAZETTE NOTICES

The Protection of Personal Information Act (POPIA) of 2013 became fully effective on 1 July 2020 as a mandatory requirement for all organisations to comply with. As an organisation Government Printing Works is required to comply with POPI requirements in all its operations, including the publishing of the gazette notices. According to Section 11 (a) Personal Information may only be processed if the Data Subject consents to the processing, and with this regard the Government Printing Works will require the Data Subject's consent to accompany all notices submitted for publishing where there is Personal Information, using Form 4. For more information, [please note the attached Reviewed PAIA Manual 2022](#).

When you submit an email for advertising of L&D or creditors, LegalEase will automatically generate a “Form 4i” POPIA consent and attach it to the email along with the J187/J193, quote and POP. The Form 4i consent document needs to be signed, so I suggest you fill in the signature and some of the contact information in the master Form4i template PDF document in advance:
Open the “Form 4i.pdf” document in the LESTATES\LETTERS folder (i.e. the LETTERS sub-folder of whichever folder contains your LegalEase program) and specify your signature as an image or as an electronic signature. Also specify any default values you may want to always appear on the Form 4i. E.g. you may want a certain CONTACT_NUMBER or EMAIL_ADDRESS or PROXY_DESIGNATION values to appear whenever a new Form4i is being generated then you can specify a default value. LegalEase will only overwrite Form 4i fields that are blank and LegalEase will automatically fill the blank fields with values from the estate (e.g. the name of the selected executor or agent).



The Form 4i POPIA consent needs to be signed in some way. You may sign it electronically if you have a signature file for PDF documents or you may insert your signature as a graphic image.

We suggest you open the "Form 4i.pdf" document under "Edit custom docs" as described above or go to the Form 4i.PDF that resides in the LETTERS sub-folder (this is the master copy of the Form4i which is used as a template for all estates). Once you do an advertising submission to the GPW, LegalEase checks if there is a Form 4i.pdf file in the "Scans / Docs" folder of the estate (e.g. C:\LESTATES\DOCS\xxxxxx yyy - 500\ if the surname of the deceased is xxxxxx and the initials of the deceased is yyy and the file number is estate is 500).

If it doesn't find a Form 4i.pdf in the estates folder under DOCS, LegalEase copies the master Form 4i.pdf from the LETTERS folder to the estate's specific folder under DOCS. So then, if you sign the master Form4i template then all future submissions to the GPW will already be signed.

Any additional information you specify in the master Form 4 will also carry through to the Form4i file of each estate.

So, we suggest you check out the "Form 4i.PDF" file and see if there is any information you would like to specify up front and also possibly signing the document before you start submitting advertising requests.

Added option to create or edit the Form 4i on the “Advertisement” page of the L&D a/c screen. Use this if you want to fill in the Form 4i in advance. If you don’t create the Form 4i before submitting the advertisement to the GPW, LegalEase will automatically create the Form 4i POPIA Consent form when you submit the advertising request to the GPW.

Changing L&D a/c (File No: 729 Estate No: 12-754-2023- BRUNNEN LAW FIRM (POPIA-ORD))

Cancel Ok

1. L&D Account 2. L&D Account (cont.) 3. Advertisements 4. Spouse's Roll over / Other

Province heading under which the adverts must be printed in the Government Gazette

Gauteng Eastern Cape Free State KwaZulu-Natal Limpopo Mpumalanga North West Northern Cape Western Cape

Creditors:

Date of the Govt Gazette Creditors advertisement: 18/08/2023

Cost of the Govt Gazette Creditors advertisement: 37.82

GPW Quote No: [] i

GPW Quote Date: []

Code of local newspaper (Notice to Creditors advert.): 001 ...

Name of local newspaper (Notice to Creditors advert.): District Mail

Cost of Notice to Creditors advert in local newspaper: 1,006.25

L&D account

Date of the Govt Gazette L&D advert: 20/02/2024

Cost of the Govt Gazette L&D advert: 37.82

GPW Quote No: QUO32341 i

GPW Quote Date: 18/01/2024

Open Form 4i POPIA consent

Scans / Docs (Document Library)

As you can see above, we also added a “Scans/Docs” button so that you can access your document library for this estate from the “Advertisements” page of your L&D screen. The “Open Form 4i POPIA consent” will check if there is already an Form 4i.PDF document in the estates specific document library folder. If it finds one it will open the document so that you can specify information or sign it. If it doesn’t find one it will copy the master Form 4i template from the LETTERS sub-folder to the estate’s document library folder and open it for you to change it and sign it, if necessary.

- Document library (aka “document repository” aka “list of scans and docs”) improvements. You can copy and paste files to and from the document library. You can paste via the “Paste file” button or by pressing Ctrl-V. This only works if you are copying/pasting a single file. To paste multiple files in one go you will have to click the “Open the folder in file explorer” button and paste the files there. If you paste files into the file explorer window, LegalEase will not automatically check if the file is advertising quote. In that case you will have to use the “Type” button to select either “J187 GG Quote” or “J193 GG Quote”. Once you have selected one of the above types, LegalEase will automatically rename the file and also update the details in the L&D a/c screen if it sees the document is an advertising quote from the GPW. You can also save email messages in your document library by copying the email message from your email program and pasting the message (.msg file) into the document library). All types of documents can be dragged into the document library from File Explorer folders (using drag and drop with your mouse).

Added a “Share” button to the document library to send the list of files to Excel so that you can print it or save it.

- The facility to add a "Type" or "Notes" to a document. You can now either click "Type" or right-click a document to select the type of document of up to 50 characters to the document. When you right-click the file you will see the standard advertising types as well as an option to select "Other".

Right-click a document to select or change the document type
Click "Other" if you want to select a type that is not on this list

The screenshot shows a 'Document Library' window with a table of documents. The 'Inventory.pdf' file is selected, and a context menu is open over it. The menu lists various document types, including 'Inventory', 'J187 GG Proof of payment', 'J187 GG Advert', 'J187 LNP Proof of payment', 'J187 LNP Advert', 'J187 GG Quote', 'J193 GG Proof of payment', 'J193 GG Advert', 'J193 LNP Proof of payment', 'J193 LNP Advert', 'J193 GG Quote', and 'Other'. Below the table, there are 'Additional options' for email, copying filenames, opening the folder in File Explorer, and opening My Documents / Scans Folder.

Name of document	Date	Time	Size	Type	Notes
Acc-FIRSTANDFINAL (001).xlsx	16/01/2024	10:14:46	20,961	Account	To be finalised
Bank Statement.xlsx	1/09/2023	7:54:57	11,520	Bank Statement	Dec 2023 Bank statement
DeathNotice.pdf	9/05/2013	21:44:46	33,623	Death Notice	Received 20/12/2023
Inventory.pdf	20/11/2012	16:04:00	48,777	Inventory	Inventory generated 31/12/2023
J187-20240101-ADV.pdf	27/01/2024	14:30:34	90,730	J187	GPW.
Last will and testament.pdf	16/01/2024	10:14:03	24,494	Last	in life custody by ABC Bank

Additional options

- Email the selected files
- Copy the filenames of selected files
- Open the folder in File Explorer
- Open My Documents / Scans Folder

If you select “Other” you may type a new description of the document or select from a list of existing descriptions/notes:

1) Specify a type or a brief description of up to 50 characters or
2) Select one of the existing types from the list of types you used before

Specify type/note relating to document

✓ Ok ✗ Cancel F2=Lookup

Enter the type of document or a note below Or select one from this list

Other

Document file name: Last will and testament.pdf

Account
Bank Statement
Death Notice
Inventory
J187 GG Advert

You may also type “Notes” of up to 1000 characters to describe a document.

Exit Open Scan Add Type Notes Select All Select None Refresh Delete Rename file Copy file(s) Paste file Share ?

Name of document	Date	Time	Size	Type	Notes
Acc-FIRSTANDFINAL (001).xlsx	16/01/2024	10:14:46	20,961	Account	To be finalised
Bank Statement.xlsx	1/09/2023	7:54:57	11,520	Bank Statement	Dec 2023 Bank statement
DeathNotice.pdf	9/05/2013	21:44:46	33,623	Death Notice	Received 20/12/2023
Inventory.pdf	20/11/2012	16:04:00	48,777	Inventory	Inventory generated 31/12/2023
J187-20240101-ADV.pdf	27/01/2024	14:30:34	90,730	J187 GG Quote	L&D a/c advert quote from GPW.
Last will and testament.pdf	16/01/2024	10:14:03	24,494	Last will	The original will held in safe custody by ABC Bank

Specify document notes (Last will)

✓ Ok ✗ Cancel F2=Lookup

Document file name: Last will and testament.pdf

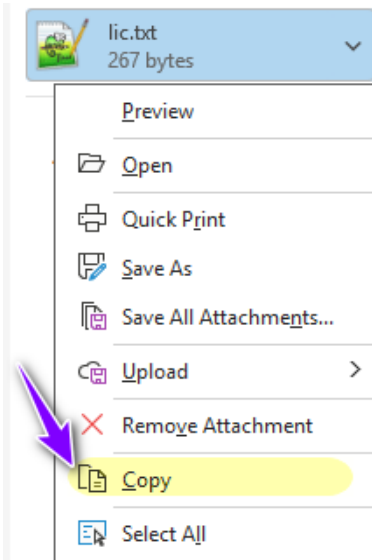
Notes/comments:

The original will held in safe custody by ABC Bank

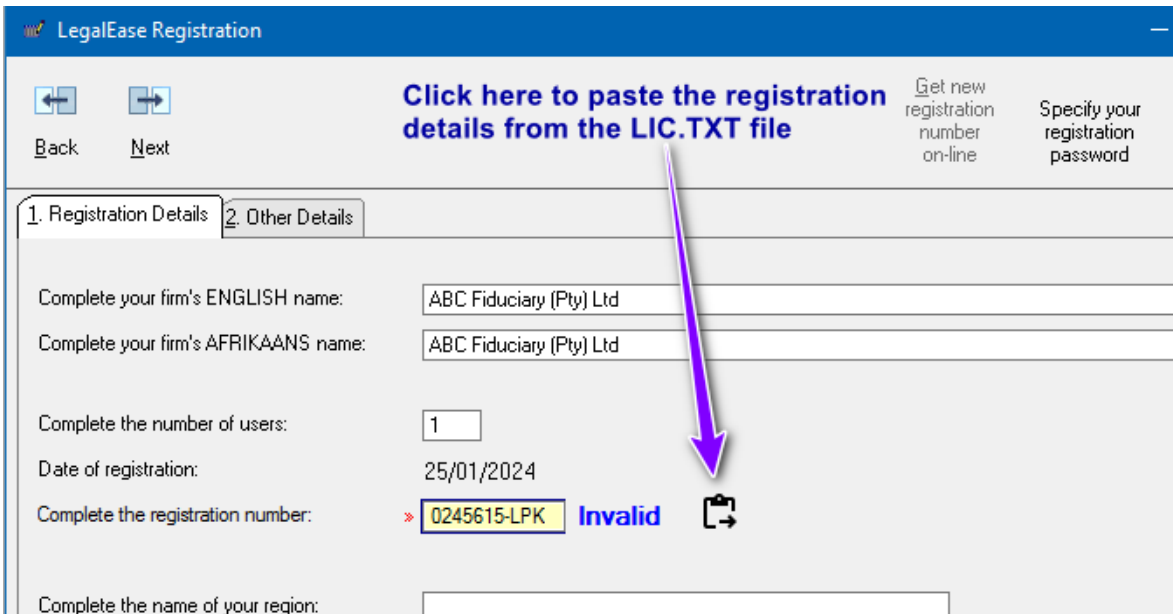
Additional options: Email the selected files, Copy the filename of selected files

- In the registration screen you may now paste a LIC.TXT file from a File Explorer folder or from an email. When LegalEase sends you a LIC.TXT file for software registration purposes you can copy the attachment and paste it into the registration screen in LegalEase.

In Outlook click the LIC.TXT attachment and click "Copy"



Then return to the Registration screen in LegalEase and click the button shown below:

A screenshot of the LegalEase Registration web interface. The page title is 'LegalEase Registration'. At the top, there are navigation buttons for 'Back' and 'Next', and a link that says 'Click here to paste the registration details from the LIC.TXT file'. Below this, there are two tabs: '1. Registration Details' and '2. Other Details'. The 'Registration Details' tab is active. The form contains several fields: 'Complete your firm's ENGLISH name:' with the value 'ABC Fiduciary (Pty) Ltd'; 'Complete your firm's AFRIKAANS name:' with the value 'ABC Fiduciary (Pty) Ltd'; 'Complete the number of users:' with the value '1'; 'Date of registration:' with the value '25/01/2024'; 'Complete the registration number:' with the value '0245615-LPK' and a red 'Invalid' message next to it; and 'Complete the name of your region:' with an empty text box. A purple arrow points to the 'Click here to paste the registration details from the LIC.TXT file' link.

7. Facility to paste .LEE or LIC.TXT files on the main screen in LegalEase.

To read in a LEE file (exported LegalEase estate data files) you can now copy the LEE file from a File Explorer window or from an email and paste it into the LegalEase main screen (i.e. the list of estate files screen) by pressing **Ctrl-V**.

You may also drag and drop LIC.TXT files and LEE files from File Explorer windows (but not from emails). Once you have pasted a LIC.TXT or .LEE file, LegalEase will ask you if you want to restart the program to read in the file.

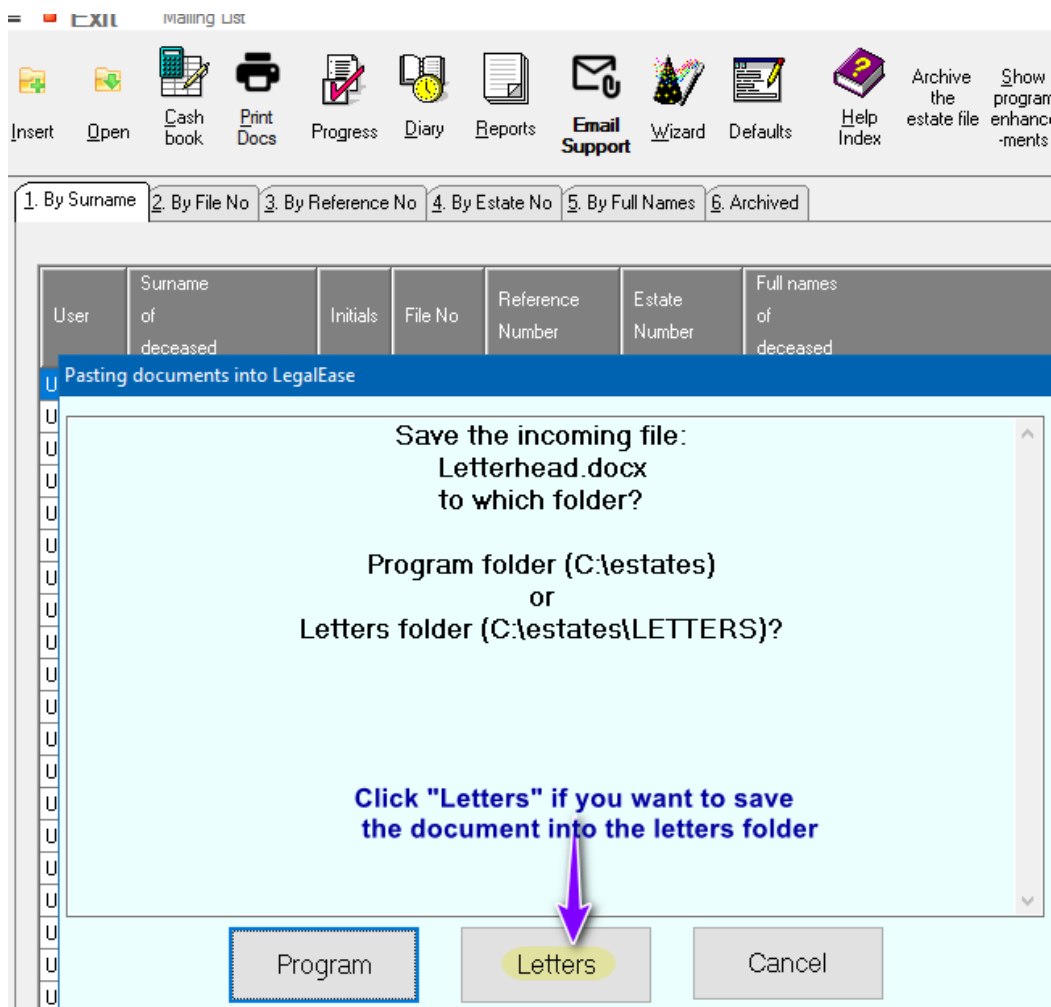
8. You can now install your firm's letterhead template by copying the updated letterhead template as follows:

Copy the letterhead file from either a File Explorer window

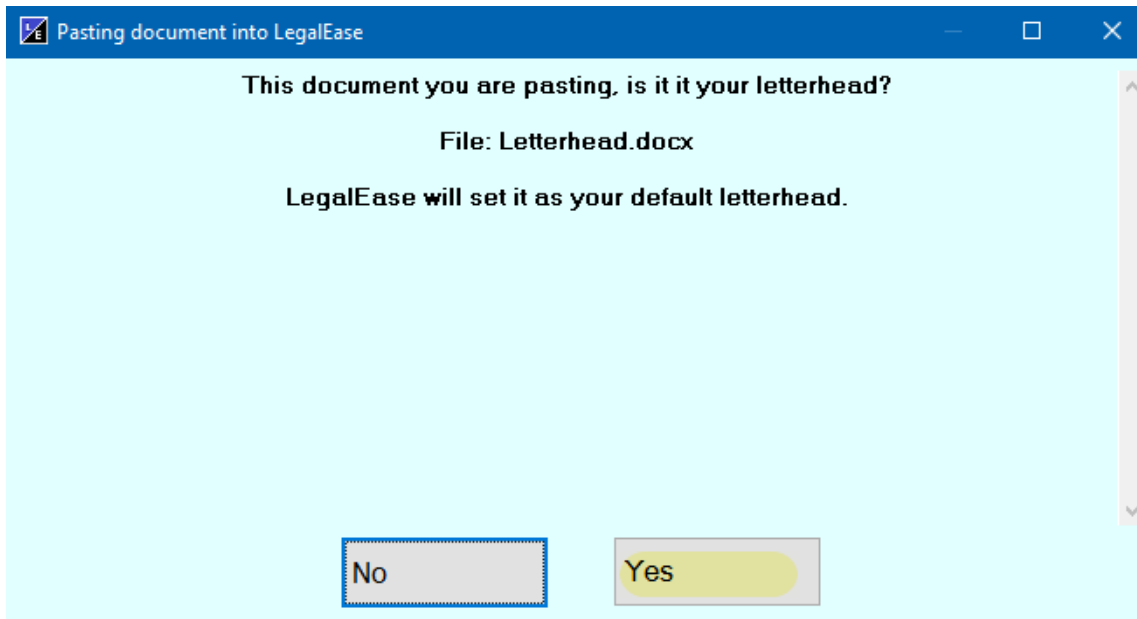
Or if the letterhead template (in docx format) is attached to an email: click once on the attachment and click "Copy"

On the main screen in LegalEase press **Ctrl-V**.

If it is a DOCX file you are pasting you will see the following prompt:



Click “Letters”. Then you will see the following prompt click “Yes”



9. Update repair utility:

If an update fails to deploy due to, for instance, actions of an anti-virus program or security or permissions settings, the result is usually that the estates.exe (program file) is no longer present after attempting a software update. If the users’ desktop shortcut no longer works and there is an error message stating the target of the shortcut no longer exists, you can find the update repair utility in the LE_UPDATE_REPAIR sub-folder. The file is called LE_UPDATE_REPAIR.EXE. Running the program will look for the latest update ZIP file and, if it finds one, will extract it for you and reinstate the main program file.

20240207 - v16.6b

EDR: Specific issue regarding farming property resolved

20240207 - v16.6c

Final distribution statement: fixed issue in distribution section regarding heir receiving cash legacy & special bequests only and having received post death advances.

20240219 – v16.6d

Please see item 3 above regarding the Form 4i (POPIA consent) for the Govt Gazette advertising.

Added a feature so that you may copy and paste a Word or PDF document to the “Edit custom docs” screen to add the document to the list of custom documents automatically.

Merging of Forms-based PDF documents are now possible. You may now add custom documents that are PDF type documents provided the PDF files contain PDF form fields. If you have a PDF document that you want LegalEase to automatically fill you can copy the document and paste it into the “Edit custom docs” screen in LegalEase. Copy the document (from a file explorer folder or from Outlook email) and then go to



the “Edit custom docs” screen (under “Print Docs”) and use the “Paste file” button or press Ctrl-V. LegalEase will automatically save the PDF document into the LETTERS folder and add the document to the list of custom documents.

20240221 – v16.6e

L&D a/c: realigned the number columns in the account further to the right to accommodate larger numbers.

20240226 - v16.6f

Fix related to GPW advertising quotes

20240301 - v16.6g

Fix for release notes (Show program enhancements) not opening