

NoticeConnect® Integration in Estate-a-Base®

We are pleased to announce the integration of NoticeConnect in Estate-a-Base. 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.


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. 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](#).

For more details, click the **Learn More** link in the **Announcements** panel on the Estate-a-Base Home page.

Publishing a Legal Notice Online – Getting Started

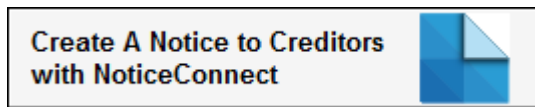
When you access **The Deceased** topic (Tab B) in a testate or intestate record, a banner for NoticeConnect appears for a few seconds. You can either click **Learn More** to read about NoticeConnect or click **No, thanks**. If you choose **No, thanks** the banner will no longer appear. To make the banner reappear, click the  icon which appears only in this topic.





To access the integration, you need NoticeConnect credentials and specific fields in Tabs B and D about the deceased and a trustee must be completed.

Creating NoticeConnect Credentials

To begin accessing this integration you need NoticeConnect credentials (i.e. a NoticeConnect account and password), which you can create in Estate-a-Base if you do not already have them. These credentials are required by either the solicitor or the law clerk working in a record.



1. In Tab B, click 
2. In the error message that appears, click **Proceed** to access the NoticeConnect Sign Up page where you can enter your email and password and click **Sign Up**.
3. Once you have credentials (either by creating them or using your existing account), go to the **Solicitor's Initials** or **Law Clerk's Initials** field in Tab A, click  to enter the Solicitors or Personnel list, select the required individual and click **Edit**. In the **NoticeConnect Login Info tab**, enter your NoticeConnect credentials and click **Test Login** to check them. Then click **OK** and **Yes** to confirm the change and select the individual.

Required Fields to Create a Notice to Creditors

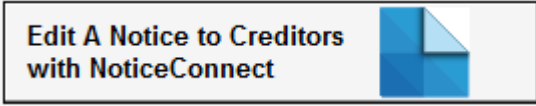
In addition to NoticeConnect credentials, the following fields in Tabs B and D must be completed:

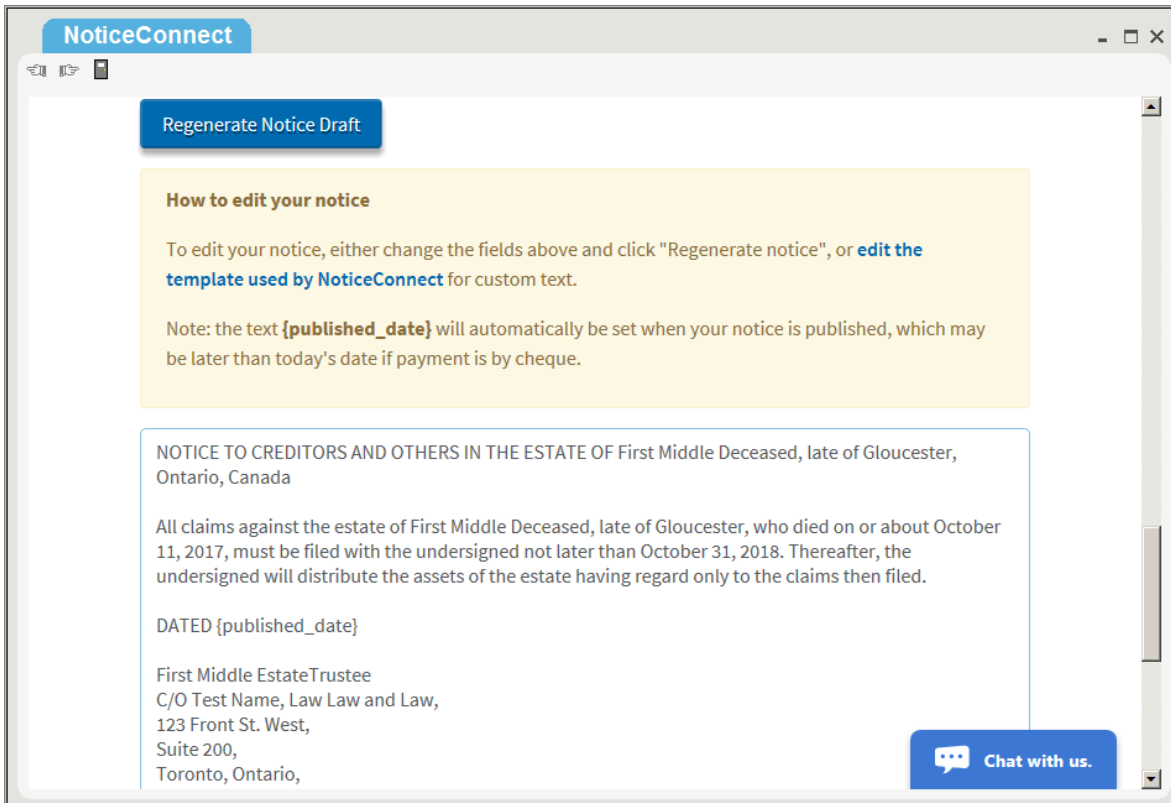
- Name of Deceased
- Date of Death
- Jurisdiction
- Date by Which Creditors must Bring their Claims (this is a new field)
- In the **Interested Parties** topic (Tab D), add an Estate Trustee and include the address, jurisdiction and **Is Contact?** details for this party.

Creating and Editing the Notice

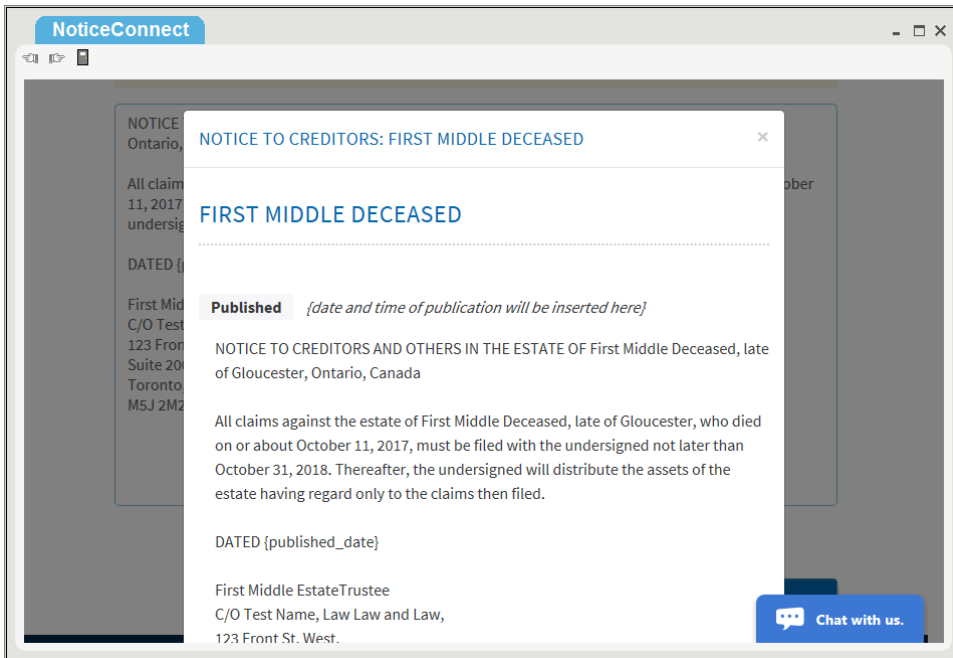
1. Once you have credentials and the required fields have been completed, go to

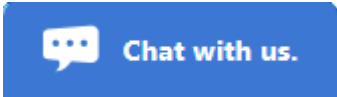


2. The buttons changes to  and the NoticeConnect form appears in an embedded window with your notice.

The image is a screenshot of a web browser window titled "NoticeConnect". At the top left of the window is a blue button labeled "Regenerate Notice Draft". Below this is a yellow informational box with the heading "How to edit your notice". The text inside the box explains how to edit the notice and includes a note about the {published_date} placeholder. Below the yellow box is a large text area containing a sample notice. The notice text includes: "NOTICE TO CREDITORS AND OTHERS IN THE ESTATE OF First Middle Deceased, late of Gloucester, Ontario, Canada", "All claims against the estate of First Middle Deceased, late of Gloucester, who died on or about October 11, 2017, must be filed with the undersigned not later than October 31, 2018. Thereafter, the undersigned will distribute the assets of the estate having regard only to the claims then filed.", "DATED {published_date}", and the contact information for "First Middle EstateTrustee" at "C/O Test Name, Law Law and Law, 123 Front St. West, Suite 200, Toronto, Ontario". In the bottom right corner of the text area is a blue button with a speech bubble icon and the text "Chat with us."

3. At this stage, you can do one of the following:
 - Edit the notice.
 - To do this you can either change the fields above the **Regenerate Notice Draft** button and then click that button again.
 - Note that any changes made to fields in the NoticeConnect window **will not appear** in the Estate-a-Base record.
 - Preview (and print) the notice before posting:



- Continue to payment
 - You will have the option of adding a commissioned affidavit of publication for an extra charge before proceeding to checkout. Or you can skip this option and go to checkout.
 - No matter which option you choose, go to the section on **Checkout and Payment Method** to proceed.
- Chat with NoticeConnect personnel:
 - Click the  button and enter your name and email to start a chat with a live NoticeConnect agent.

Checkout and Payment Method

1. In the **Checkout** screen, you will see the charge for the notice and affidavit of publication (if requested). You will also have the option to pay by credit card or by cheque.
 - If you choose to pay by credit card, you can either use a credit card saved previously or use a different one.
 - If you choose to pay by cheque, you will receive a confirmation email immediately and your notice will be published when the payment clears.

CHECKOUT

| Item | Price |
|--|---------------------|
| Estate notice for: First Middle Deceased (AKA Joe Smith, Jack Smith, Bob Brooks, Sam Brooks and Dan Brown) | \$130.00 |
| Commissioned affidavit of publication ✖ | \$40.00 |
| Subtotal | \$170.00 |
| Tax | \$22.10 |
| Total | CAD \$192.10 |



We use only encrypted communication between our server and your computer. Passwords and financial information are stored securely. We take your privacy and security very seriously.

INVOICE ADDRESS

Address on file for Andrea @ Do Process LP:
123 Front St. West Suite 700
Toronto
Ontario
M5J 2M2
Canada

PAYMENT METHOD

Pay by credit card Pay by cheque

Use saved card ending in 4242, expiry 5 / 2022

Use a different credit card

Complete your purchase

Lex Cortex Ltd.
10th Floor, Suite 1002
10 Dundas St East
Toronto, ON M5B 2G9
Canada

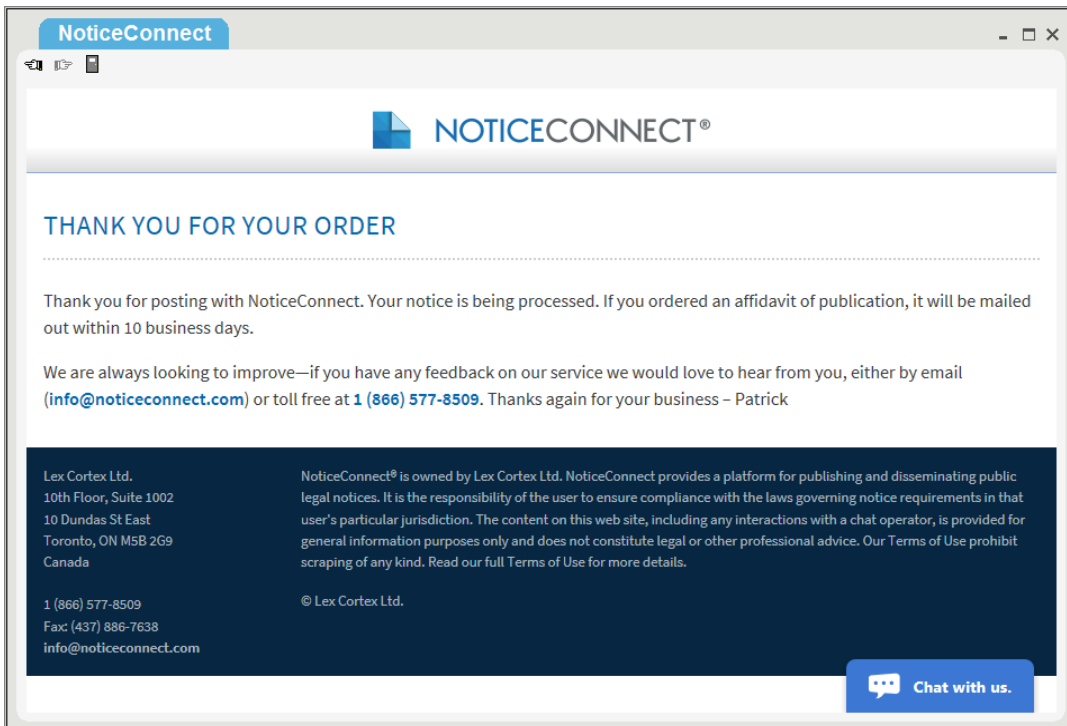
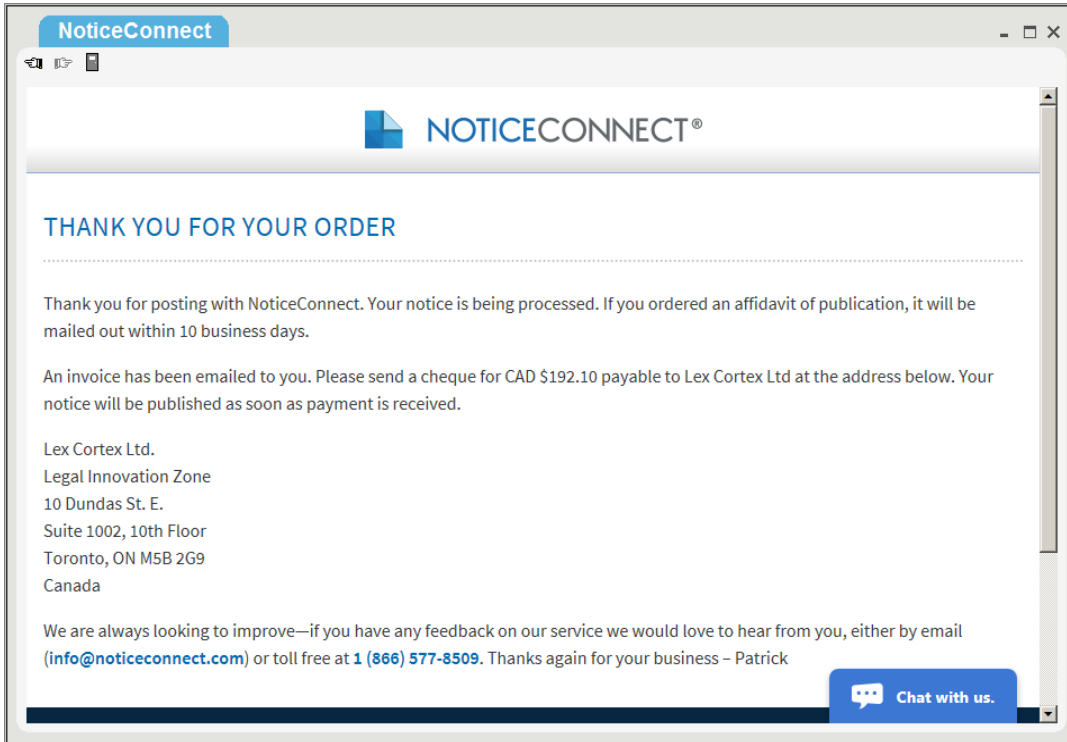
NoticeConnect® is owned by Lex Cortex Ltd. NoticeConnect provides a platform for publishing and disseminating public legal notices. It is the responsibility of the user to ensure compliance with the laws governing notice requirements in that user's particular jurisdiction. The content on this web site, including any interactions with a chat operator, is provided for general information purposes only and does not constitute legal or other professional advice. Our Terms of Use prohibit scraping of any kind. Read our full Terms of Use for more details.

1 (866) 577-8509

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 Chat with us.

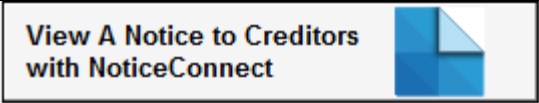
2. Once you choose the payment method, click **Complete your purchase**.
- A Thank You message appears in the NoticeConnect window. The message will differ slightly depending on whether you paid by cheque or by credit card.



- NoticeConnect will email a receipt to you (if you paid by credit card) or an invoice (if you paid by cheque). The receipt includes a link to the notice.
- Once the notices are published (which is immediate for credit card payments), you will be able to see them on the **Home** page in NoticeConnect in the **RECENT NOTICES** section and in the **Access Notices** page.

**View A Notice to Creditors
with NoticeConnect**



- In Tab B, the button changes to  and you can view the notice.

Generate a Knowledge of a Will Notice

You also have the option of creating a knowledge of a will notice in Tab B of an Intestate record in the same efficient way you create Notice to Creditors. This notice will be posted to the **Home** page in NoticeConnect and will be sent to lawyers and firms across Ontario.

If a will is discovered and you have already created an intestate record in Estate-a-Base, you can change the matter type from intestate to testate and complete the information of the found Will on Tab B.

Required Fields to Create a Notice of Knowledge of a Will

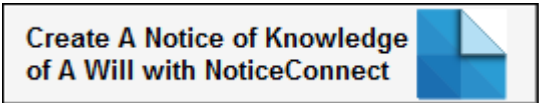
In addition to NoticeConnect credentials, the following fields in Tabs B and D must be completed:

- Name of Deceased
- Date of Death
- Jurisdiction
- In the **Interested Parties** topic (Tab D), add an Estate Trustee and include the address, jurisdiction and **Is Contact?** details for this party.

Creating Knowledge of a Will Notice

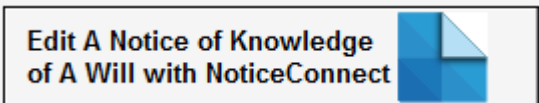
**Create A Notice of Knowledge
of A Will with NoticeConnect**



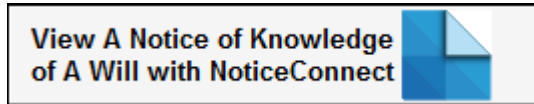
1. In Tab B of an Intestate record, click .
2. The NoticeConnect form appears in an embedded window with your notice and

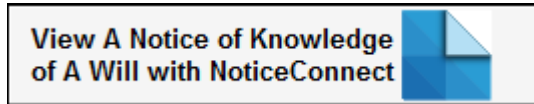
**Edit A Notice of Knowledge
of A Will with NoticeConnect**



the button changes to .


3. At this stage, you can edit the notice, preview it before posting, continue to payment or chat with NoticeConnect personnel. Go to page 3 for details about these options.
4. A Thank You message appears in the NoticeConnect window and a receipt is sent to your email address. The message is slightly different, depending on whether you paid by cheque or credit card.
5. To view the notice in the NoticeConnect website, go to the **Recent Notices** section of the **Home** page or go to the **Access Notices** page.



6. In Tab B, the button changes to  and you can view the notice of knowledge of a will.

Changing an Intestate Record to Testate in Estate-a-Base

You can change the matter type of a record once it has been closed and reopened. Follow these directions to change an Intestate record to Testate:

1. In the **Type of Matter** field in Tab A, click .
2. Click **Proceed** in the Warning message.
The record is reset to Testate.

Including Notices 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.

Contact Information

NoticeConnect

For questions and feedback about NoticeConnect:

Email: info@noticeconnect.com

Toll Free: 1-866-577-8509

Fax: 437-886-7638

Do Process

For assistance with Estate-a-Base:

Email: inquiries@doprocess.com

Toll Free: 1-866-367-7648