EstateView.exe Help Document

Overview of a few useful features embedded in the application.

Contents

[How To Save and Edit Client Configurations 1](#_Toc94894589)

[New 1](#_Toc94894590)

[Open 2](#_Toc94894591)

[Save 2](#_Toc94894592)

[File Tab 3](#_Toc94894593)

[Hover Text to Client Buttons 3](#_Toc94894594)

[New Client 4](#_Toc94894595)

[Open Client 4](#_Toc94894596)

[Save Client 4](#_Toc94894597)

[Lookup AFR Functionality on Installment Sale Calculator 5](#_Toc94894598)

[Save Results in Installment Sale Calculator 6](#_Toc94894599)

[Save Options Screenshot 6](#_Toc94894600)

[Save Results Screenshot 7](#_Toc94894601)

[Save Results to Excel 8](#_Toc94894602)

# How To Save and Edit Client Configurations

It was confusing for the user to know how to save, load and create new client configurations. This is made simpler by adding script to the top ribbon. We have 3 functionalities: New, Open, Save.

## New

This button is on the top ribbon on the far left. This will clear all current configurations and revert to the default (Bob & Mary Sample).

Graphical user interface, application, Word

Description automatically generated

## Open

This button is on the top ribbon, second from left to right. It will open a previously saved EstateView Client. You will need to navigate to the configuration thought your file explorer.

The files will always have an EstateView extension. The example shown below is named: Important\_Client.EstateView.

Graphical user interface, text, application

Description automatically generated

## Save

This is the third button to the left on the upper ribbon. Use this button to save the current configuration to be open in the future. The example shown below is a document generated as NewClient.EstateView.

Graphical user interface, application

Description automatically generated

## File Tab

The functionality described above is also available on the file tab. This is shown below.

Graphical user interface

Description automatically generated with medium confidence

# Hover Text to Client Buttons

To increase ease of use hover text was added to the client configuration buttons. The intent is to help the end user understand the purpose of the buttons before clicking on them.

## New Client

The hover text notifies the user that clicking on this button will clear out all the current configurations and revert to the default configuration.

Graphical user interface, application, Word

Description automatically generated

## Open Client

The hover text on the open client button notifies the user that clicking this button will open a previously saved client configuration.

Graphical user interface, application

Description automatically generated

## Save Client

The save client button has hover text that notifies the end user that clicking on this button will save the currently configured client.

Graphical user interface, application

Description automatically generated

# Lookup AFR Functionality on Installment Sale Calculator

The IRS updates their recommendations for the applicable federal rates every month. If a user is trying to create their projections, they might have an issue finding this information. The user now has a look up tool that will take them to the latest recommendations from the IRS.

Graphical user interface, application

Description automatically generated

This will open a web browser to the IRS website where the user can look up the applicable AFR.

Graphical user interface, text, application

Description automatically generated

# Save Results in Installment Sale Calculator

The save functionality has been updated on the installment sale calculator.

## Save Options Screenshot

The save options screenshot will save an image of the inputs used to create the installment sale results for the Grantor’s Estate. While this functionality was preexisting the ribbon design didn’t make the functionality apparent to the user.

Graphical user interface

Description automatically generated with medium confidence

## Save Results Screenshot

The save results screenshot will save an image of the results for the Grantor’s Estate and Grantor Trust. While this functionality was preexisting the ribbon design didn’t make the functionality apparent to the user.

Table

Description automatically generated with medium confidence

## Save Results to Excel

A new functionality is the ability to save the results to excel from the Installment Sale Calculator. Clicking on the button towards the far right will save the results.

Graphical user interface, table

Description automatically generated with medium confidence

If the file is created successfully, then the final excel file will pop-up. It will look similar to the sample page shown below.

Graphical user interface, application

Description automatically generated