



March 24, 2014

UPGRADE NOTICE

The Conveyancer Version 16.1A is now available for upgrade. **This is a mandatory upgrade for customers ordering title insurance policies from Stewart Title or Chicago Title.**

In this version, we've incorporated many of your requests for features that will improve your workflow and help minimize errors. It is the first of four significant releases planned for The Conveyancer throughout the year, followed by three more in the summer, fall and winter of 2014.

Introducing NextSTEPS, an Upgrade to the STEPS® Application

The upgraded version of STEPS from Stewart Title, renamed NextSTEPS, is now available. You must upgrade The Conveyancer to version 16.1A to access the new features. The following enhancements are included in the upgrade:

- The ability to order policies for transactions involving multiple properties (e.g. blanket mortgages), allowing you to process these types of deals more quickly.
- Easy-to-navigate menu options that better organize the steps required to complete an order.
- An easier-to-use interface in which order information can be saved and reviewed at a later date. The application will also alert you when required information is missing, saving you valuable time locating the missing information yourself.
- The ability to revise your order at any time during the process without having to contact Stewart Title.
- The integration of the Automated Payment Program (APP), eliminating dual logins to process credit card payment.
- In a Purchase transaction record, the Solicitor's Name for the vendor is a required field for NextSTEPS.

Mandatory Upgrade for Chicago Title

This upgrade ensures that Chicago Title recognizes whether the mortgagee selected in Tab G is a private lender or an institutional lender. The additional \$50 premium reflected in Chicago Title's premium pricing will appear on the invoice for each private lender commencing April 1, 2014.

- In the LOFTI tab, new "I" and "P" labels were added with explanations for institutional lenders and private lenders.

Support for Your Operating System and Word Processor

The Conveyancer is now fully compatible with Microsoft® Office 2013 and Microsoft Office 365 (desktop version).

Microsoft has announced that it will no longer support Microsoft Windows® XP and Microsoft® Office 2003 as of April 8th, 2014. As a result, we strongly advise you to upgrade your operating system and word processor quickly to ensure the data in your office remains secure.

We will continue to provide support for all Do Process applications running on Windows XP and Office 2003 until December 31st, 2014. After that date, we will only support Microsoft Windows 7, 8 or 8.1, Microsoft Office 2007 and 2010, and Corel® WordPerfect® X5 and X6.

Access Utility Forms Directly in The Conveyancer

More utilities are moving to online form submission for final meter readings and move in/move out notifications. You can now directly access these online forms using the new AutoFill Utility Forms feature in the Compliance/Web Forms topic, saving valuable time and eliminating data entry errors.

- We've already prepared forms for Enbridge and Hydro One Networks Inc. so that the web forms are automatically populated with data entered in The Conveyancer.
- This feature is only available in web forms "mapped" by Do Process.
- The web form URLs are programmed in the Jurisdiction Record.
- To send us requests for additional utilities, go to the Compliance/Web Forms topic and click About AutoFill Utility Forms > Email New Mapping Request.

General Enhancements

Availability of GST/HST New Residential Rental Property Rebate Application Form – Access the GST/HST New Residential Rental Property Rebate Application form in Purchase, Sale and Project transaction records.

- To access, go to Forms > GST/HST New Housing Rebate Application > [Additional GST/HST forms] > GST/HST New Residential Rental Property Rebate Application and fill out the form. Then close the form and produce it by clicking Generate Form.

Availability of GST524 Ontario Report Schedule Form – Access the GST524 Ontario Rebate Schedule form in Purchase, Sale and Project transaction records. Follow the directions for accessing the GST/HST New Residential Rental Property Rebate Application form, click the GST524 Ontario Rebate Schedule and fill out the form. Then close the form and produce it by clicking Generate Form.

Mandatory Fields Added for New Lender Document Request – When requesting a new lender document, the fields “Website to obtain Document” and “Your email address” are now mandatory.

Excluding Taxes in Real Estate Commissions – To support a real estate commission that does not include taxes, two new fields have been added to the RE Broker/Commission topic in a Sale record: “Commission” and “HST on Commission”.

Support for Multiple Clients Signing in Different Locations – Periodically, clients may want to sign in different locations in the same province or in different provinces. These locations will automatically appear in the signing lines of generated documents and lender forms.

- Activate this feature in the “Override default signing location of documents as specified in Tab A” field, in the Client Name(s) box accessed from Tab B.
- For individuals, specify the City and Municipality.
- For corporations, Power of Attorney and Estate, specify the City and Municipality for signing officers, attorneys or estate trustees.
- The signing lines for clients in the same location will be grouped together.

Support for Mobile Homes – In the Subject Property topic, the option **mobile homes** has been added to the “Purchase is of” field.

Support for Assignment of Rents and General Security Agreements – In the Mortgage Terms subtopic, new fields have been added for “Assignment of Rents” and “General Security Agreement”. New master document are available and DP codes have also been added (25215 to 25218 for Assignment of Rents and 25221 to 25224 for General Security Agreement).

Support for SQL Version of PCLaw® – The Conveyancer supports the SQL version of PCLaw.

Text Formatting for Requisitions – Text formatting applies to new requisitions (after 2009) in generated documents.

More Characters for Email Addresses – Enter up to 40 characters in Email fields in the Existing Mortgage and New Mortgage topics.

New DP Code to Support Registering an Instrument – 16401 – cost of registering an instrument (inclusive of ELRSA fee and applicable taxes) = \$71.30.

Changes to DV.P and DV.S – The master documents dv.p and dv.s have been updated with additional support for vacant land.

- Before installing, make sure you have a backup of your current master documents.
- To install, go to Updates > Import selected master documents from Do Process Software and click the Purchase or Sale category. Documents appearing in green shading in the DPS Version column have been added. Double-click the required document and proceed. The Master Document will be copied to your folder.



Enhancements for Projects

Report for Tarion for Condominium Projects – Generate monthly reports about condominium projects for Tarion, using the Tarion Report button in the Deposit Manager and then export these reports to MS Excel. The master document Dec-dep\$-held-escrow.s has been created to support the Tarion declaration.

Need Help Upgrading?

Visit the [Customer Resource Centre](#) for instructions or contact Customer Service at 1.866.367.7648 or inquiries@doprocess.com.

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