Transaction Data Exchange (TDX)
Quick Start Guide

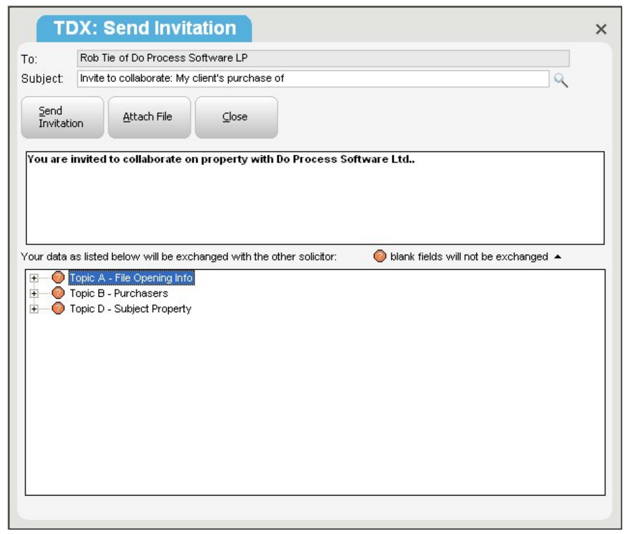
The **Transaction Data Exchange (TDX)** feature in **The Conveyancer®** streamlines communication with other firms. TDX allows for the exchange of data, file attachments and messages between **The Conveyancer** firms working on a real estate deal.

Received messages from other firms will show in your **TDX Inbox** and will be shared with The Conveyancer software users in your firm. The data and attached documents will automatically be included in the applicable transaction record.

Also, the **Client Information Request Form (CIRF)** is securely handled through TDX. Use this feature to expedite data entry in your transaction records by having your clients fill out and email back a Client Information Sheet.

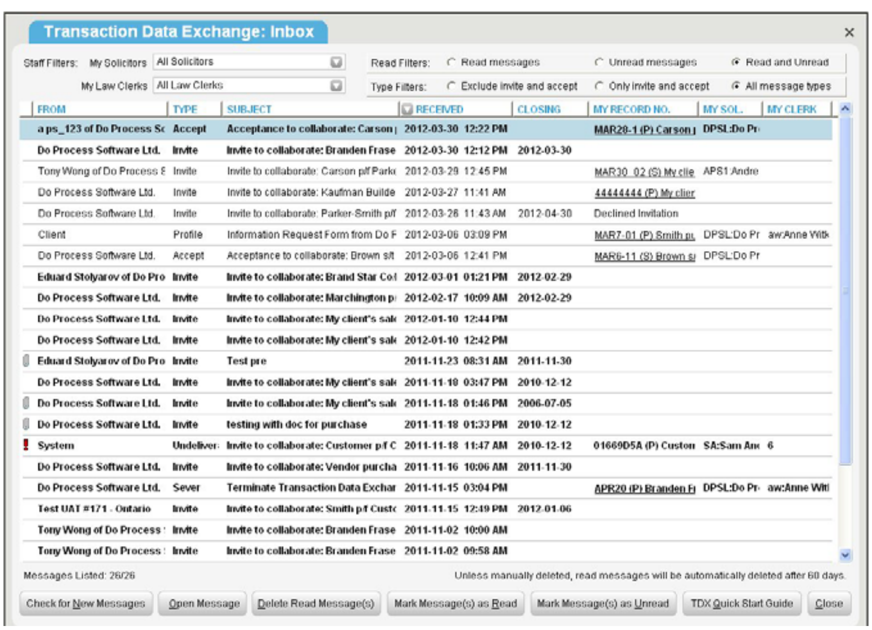
To Send an Invitation:

Extend an invitation to another firm to participate in a deal, from the TDX area in **Tab C**. Click **[Send TDX Invitation]**, enter message details, attach documents to be exchanged and click **[Send Invitation]**. Files not already in PDF will be converted during transmission.



Data must be entered or selected in the following fields before the invitation can be sent:

- **Record No.** and **Solicitor** fields in **Tab A**
- **Solicitor's Name** field in **Tab C**. The (other) solicitor must be from the central repository
- **Purchase is of** field in **Tab D**



Message Alerts: All new TDX messages received for the firm will be displayed in the **Transaction Data Exchange** panel of the **Home** page. Click the link to access the **TDX Inbox**. You can also access the inbox directly by clicking **Tools > TDX Inbox**. Open the message, get the details and decide how to act on it. The following message types will be available in the inbox: **Invite**, **Accept**, **Decline** and **Sever**. The **Profile** type indicates a CIRF.

To Accept or Decline an Invitation: Double-click the required **Invite** message, click **[Accept Invitation]** in the **Accept/Decline Invitation** box and then assign the deal to a new or to an existing transaction record.

To Handle an Accepted Invitation: If you decide to assign the deal to an existing transaction record, select the record. If you decide to assign it to a new record, enter the record and file number, the solicitor and the closing date. Then click **[Proceed]**.

In the **Import Data from Other Solicitor** box, compare the data contained in your record (shown in the **Your Current Data** column) to the data sent by the other solicitor (shown in the **Exchanged Data from Other Solicitor** column). Click **???** under the **Exchange Data** column and select **Accept** or **Decline**. Selecting a response in a yellow **Tab** row will cause all displayed fields within that tab to adopt the same response. Then click **[Proceed to Send Acceptance]**.

Your acceptance is then sent to the other firm. When you open the transaction record, it contains all of the data from the other firm that you agreed to receive.

The invitation is marked as accepted in the **Inbox**.

Data sent from another firm's **Purchase**, **Sale** or **Mortgage** transaction record are loaded into the message recipient's **Sale**, **Purchase** or **Mortgage** transaction record, respectively.

To Decline an Invitation: Click **[Decline Invitation]** in the **TDX Inbox**. In the TDX **Decline Invitation** box, enter a short message and click **[Send Decline to Invitation]**. The invitation is marked as declined in the **Inbox**.

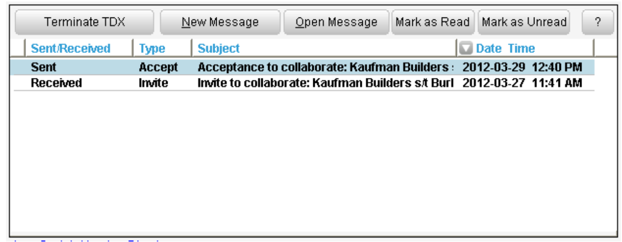
TDX Inbox: The inbox contains recently received messages. Open and review these messages. If you open a message not intended for you, click **[Mark Message(s) as Unread]**. It will be displayed in bold and can be acted on by others in your firm.

Messages associated with existing records will include the names of the solicitor and law clerk in your firm who are handling the deal. Filter the displayed invitations according to solicitor and/or law clerk, read and/or unread messages, and message type.

Once opened, the message will automatically be applied to the record and displayed in the TDX area in **Tab C**. Attachments will appear in the **DP Filer** for that transaction record.

Deal-Related Messages: Once a connection to the other lawyer is established, send deal-related messages to the other lawyer from the TDX area in **Tab C** by clicking **[New Message]**. Include a subject heading (accessible from precedents), the message text and attach files. Once your message is complete, click **[Send New Message]**.

To view a message from the other solicitor in the **TDX** area, double-click the message.



To Refresh Solicitor/Firm Name: Click **Refresh from CR** in **Tab C** to ensure you have the most up-to-date information about the other firm or solicitor in your transaction record.

To Sever a Relationship: In **Tab C** of a transaction record, either solicitor may terminate the exchange by clicking **[Terminate TDX]** and confirming the break. Severing also occurs under the following conditions:

- The "Other" solicitor in **Tab C** is changed to a lawyer of another firm
- The transaction record number is changed
- The transaction record is reset

To Update Contact Information: Keep your firm's and lawyers' information current at **Go to > Maintain Lawyer Centric Profile**.

To View Participating Firms and Lawyers: View TDX participating firms and lawyers in the **Solicitors** database. These records are highlighted in grey and cannot be changed.

The **Solicitors** database is automatically updated at your firm when The Conveyancer application is opened the first time in the day.

Not signed up yet? Then go to this website: **http://www.lawyercentric.com/Main/Lawyers/Services_Register.aspx**.

To Contact Do Process Software:

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