



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.

## 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.

**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.

**Multiple Entries for Roll Number** – The Roll Number box in the Subject Property topic can hold up to 10 entries each for LINC and Roll numbers.

**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.

**Display Late Closing Interest on Mortgage in Tab A** – In Tab A, view the amount for the late closing interest specified for the mortgage.

- In the “On closing date, pay” field in Tab A, select “Cash Difference”. Click  to open the “Calculation of Cash Difference and Late Closing Interest” box. The mortgage principal amount (from Tab G) appears in the “Cash to Close” field and the interest is calculated based on that amount. After entering a special amount for the Net Advance in Tab G, you can select either the principal or the special amount to calculate the late closing interest in Tab A.

## Enhancements for Projects

**Include Developer’s Name and Developer’s Solicitor Name** – In a Project Sale record, include the developer’s name and the developer’s solicitor’s name to the Vendors topic (Tab B).

## Need Help Upgrading?

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

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