

The Conveyancer® and ESILAW® Quick Start Guide

Introducing the ESILAW export/import functionality. This new feature automates and simplifies the entry of data from the Statement of Account in The Conveyancer into ESILAW. Save valuable time and increase efficiency for your firm by eliminating duplicate data entries and reducing errors that may result from repetitive work.

We estimate that legal professionals spend approximately five minutes per file duplicating their Conveyancer account into ESILAW. If your firm closes 30 transactions per month, this equates to a time savings of 2.5 hours per month or a total of four days of work per year.

The initial setup is easy and should only take approximately 10 minutes to complete.


When developing this feature, we took into account the different methods used by law firms working with ESILAW. We suggest that you read this document in its entirety to familiarize yourself with this feature and develop guidelines for your office.

You are required to have version 15.3A or higher of The Conveyancer and ESILAW version 2013.1 prior to completing the few simple steps detailed in this guide.


Adding new ESILAW Directories in Conveyancer

Two new directories for ESILAW will need to be added to your User Setup prior to configuring your Statement of Account. These directories can be found by logging in as the default user and selecting **User Setup > select the user > Directories** subtab (or accessed by a user from **Go to > User Setup > Directories** subtab).

Accounting Data Directory

In the Accounting Data Directory field, enter the path for your ESILAW data files (i.e. c:\Esilaw\data). Browse your required directory by double clicking the empty field or selecting .

Accounting Export Directory

In the Accounting Export Directory, enter the path to your installation of ESILAW (i.e. C:\esilaw\). Browse to your required directory by double clicking the empty field or selecting .

Configure Statement of Account Settings

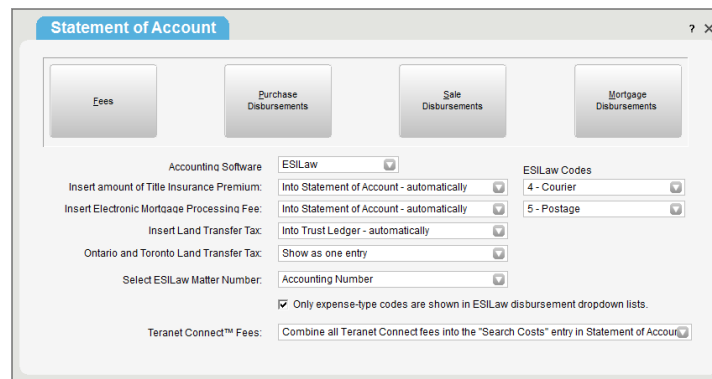
Once the ESILAW directories have been added to your User Setup in The Conveyancer, the accounting software must be selected and the Statement of Account can then be configured by the Default user in **Configuration > Statement of Account**. Purchase Disbursements, Sale Disbursements and Mortgage Disbursements must be configured separately.

Accounting Software

Choose ESILAW from the Accounting Software drop down menu prior to configuring the Statement of Account.

Configure Disbursements

For each disbursement (Purchase, Sale or Mortgage), select either **Subject to HST** or **Not Subject to HST**. In the **Disbursements** box, for each **Name of Disbursement**, select the corresponding ESILAW code from the drop down menu. All of your ESILAW codes have been imported directly from your ESILAW Data Directory.



NOTE: The Reset button will reset all Disbursement entries back to their initial default values. It will also remove any manually entered items including any ESILAW selected values.

Configure Additional Items

For each additional item that appears on the Statement of Account, such as Title Insurance Premium, Electronic Mortgage Processing Fee and Land Transfer Tax, select the ESILAW code from the drop down menu.

ESILAW Matter Number

Determine where your ESILAW matter number is entered in The Conveyancer by selecting File Number, Record Number or Accounting Number from the drop down located beside the field **Select ESILAW Matter Number**. This step is required for the export/import process.

Statement of Account within a Record

Now that you have completed your initial set up, you will see all of the designated ESILAW codes on the Statement of Account tab under the heading **ESILAW Codes** (as long as the “Check to show Esilaw Export feature” is checked.) Although selected in Configuration,

these codes are not locked down. This will allow you the flexibility of changing the ESILAW codes, in an open transaction record, should the need arise.

Insert New Row

Inserting a new row into the Statement of Account continues to function as usual with the exception of having to enter an explanation code or GL code from the drop down menu. If you do not enter an ESILAW code, this disbursement will not be exported to ESILAW.

Compliance Letters

Costs associated with compliance letters will appear on the Statement of Account automatically. An ESILAW code is not assigned to these expenses as it is assumed that you have already written cheques for these disbursements in ESILAW.

Statement of Account		
<input type="checkbox"/> Calculate fee based on all-inclusive price of		Rate of HST 13.0% <input checked="" type="checkbox"/> Uncheck to hide ESILAW Export feature
ESILAW Codes		
Fees		
DUR FEE for acting on purchase	\$600.00	
MY FEE re 1st mortgage arranged	\$200.00	
Total	\$800.00	
HST (13%)	\$104.00	
Disbursements - Subject to HST		
Search costs	\$15.00	5 - Postage
Executions Certificate	\$10.00	10 - Court Reporter Transcripts
Subsearch	\$25.00	11 - Accident Reports
Photocopies	\$10.00	6 - Runners Fees
Postage	\$25.00	12 - Marriage Certificate
Fax transmissions	\$15.00	12 - Marriage Certificate
Couriers	\$10.00	9 - Photocopies
Long distance telephone	\$15.00	15 - Certified Checks
Travelling expense	\$12.00	12 - Marriage Certificate
Transaction Levy Surcharge	\$0.00	
Software Transaction Charge	\$0.00	6 - Runners Fees
E-Reg service charge	\$0.00	
Total (Disbs. Subj. to HST)	\$137.00	
HST (13%)	\$17.81	
Disbursements - Not Subject to HST (Agency)		
Title Insurance Premium	\$378.00	4 - Courier
Title Registration Fee	\$0.00	11 - Accident Reports
Mortgage Registration Fee	\$0.00	8 - Travel Expenses
Total (Disbs. not Subj. to HST)	\$378.00	
TOTAL	\$1,436.81	
Received on Account	\$1,436.81	
Balance Owng	\$0.00	
Total HST	\$121.81	

Preventing Export of a Specific Disbursement

If you do not wish to export a specific disbursement, simply delete the ESILAW code next to that disbursement.

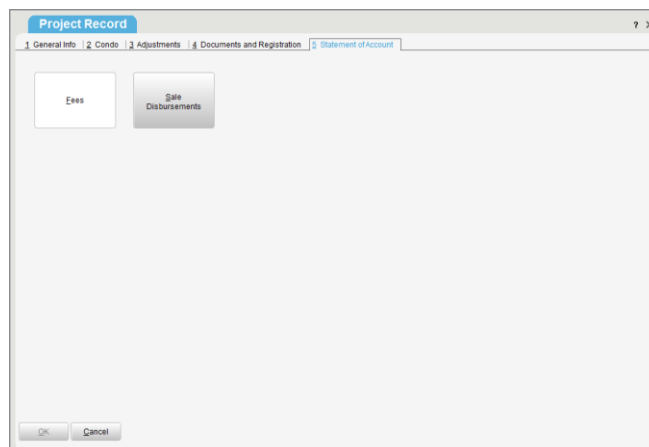
Hide ESILAW Codes

If you do not use ESILAW as your accounting system or would like to hide the ESILAW code column on the Statement of Account tab, uncheck the “Uncheck to hide ESILAW Export feature” box at the top of the topic.

Projects Users

Projects users can now assign fees, disbursements and ESILAW codes at the project record level. This gives project users the flexibility of having different fees, disbursements and ESILAW codes for each project.

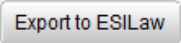
To set up this feature, select Tab 5 – Statement of Account from the



Project Record. Set your fees and disbursement value by selecting either Fees or Sale Disbursements.

If you have entered ESILAW Codes under the Default user, these codes will be shown under the Sales Disbursements. These codes can be amended if necessary.

Export to ESILAW

Once the Statement of Account has been completed and a solicitor is specified in Tab A, select . An **Accounting Files Created** box appears stating which files have been successfully created (**dpFee.txt** and **dpDisb.txt**). You can import into ESILAW immediately or you can continue exporting further accounts. All accounts will remain in the export folder until imported into ESILAW allowing you to do a mass import of these accounts into ESILAW.

Note: To complete this export, the Matter (see ESILAW Matter Number setup above) and lawyer in Tab A must match the Matter and lawyer in ESILAW.

Exporting Multiple Files

Export multiple files to ESILAW using **Esilaw Export.LFW** in Advanced Search (List): This predefined search list includes the **Last Esilaw Export** label (located at the bottom of the **Statement of Account** topic).

- Click **Advanced Search (List)**, select **Esilaw Export.LFW** and click **Search**.
- In the generated list, select files marked as **Ready for Export** or files that have already been exported if you wish to process them again. Note that files marked as **Incomplete Accounting Data** do not contain ESILAW data and cannot be exported.
- Click **Export > Export to Esilaw**.

NOTE: Files that were exported previously will not generate into this list.

Importing into ESILAW

To import the disbursements into ESILAW, go to **Daily Activities >** under **Enter Disbursements** select **Import Disbursements** from the dropdown list > select **Do Process – The Conveyancer >** select **Continue >** select **Import**. A message will appear indicating that the import was successful. If the import was not successful an error report will be displayed showing the invalid entries. For more information on the import feature refer to the tutorial in the [ESILAW Learning Center](#).

The fees and disbursements for your record will be merged into the ESILAW matter. If a mass export was completed all fees and disbursements will be entered into the appropriate matters in ESILAW.

NOTE: Once you have imported your Statement of Account to ESILAW, all amendments or changes must be made in ESILAW. Do not select in The Conveyancer again as this will cause duplicate entries on your ESILAW client ledger. You can, however, remove the ESILAW codes in the Statement of Account within The Conveyancer for those entries that you do not wish to export again. If you have already made entries in ESILAW ensure that you remove the ESILAW codes from the Statement of Account prior to exporting in order to prevent duplicate entries.

Support

For support with setup, configuration and export please contact Do Process Customer Support at 416.322.6111 or TOLL FREE 1.866.367.7648 or inquiries@doprocess.com. For help with creating codes, error reports or billing please contact ESILAW at 1-800-663-8759 or support@esilaw.com.