THE CONVEYANCER®

Step by Step Guide

Logging On to The Conveyancer

1. Double-click The Conveyancer icon on your desktop **OR** – on the taskbar, click Start → All Programs → Do Process Software →The Conveyancer.
2. The Log In box appears with a list of available users.
3. Double-click the required user name **OR** select a user name and click Select.

Transaction Records

Creating a New Transaction Record

1. Click New, **OR** on the Records menu click New, **OR** press Ctrl+N.
2. The Create a New Transaction Record box appears.
3. Click Purchase, Sale or Mortgage.
4. The File Opening Info topic appears, with fields that are specific to the selected transaction record type.
5. Enter the information in the fields, as required.

TIP | Refer to the bottom line help text in blue at the bottom of the screen.
It provides hints and shortcuts for many of the fields.
Click the 🔍 to access secondary databases or lists.
Click the 🖉 to enter data using a structure format (i.e. for names and addresses).

Opening an Existing Transaction Record

QUICK SEARCH

1. From the Record No. drop down you can select a type of search to perform.
2. In the Enter Search Criteria box enter the information you are looking for i.e. file number, client name, etc.
3. Click Search.

UPCOMING PANEL

Click one of the entries in the Upcoming panel to open the associated transaction record.

TO OPEN AN EXISTING TRANSACTION RECORD FROM A LIST OF THE SAME RECORD TRANSACTION TYPE

1. Click Open, **OR** on the Records menu click Open, **OR** press Ctrl+O.
2. The Open an Existing Transaction Record box appears.
3. Click Purchase, Sale or Mortgage.
4. The Open a Record box appears. It includes a list of all of the existing transaction records of the selected type.
5. To sort the list by one of the other column names, click the arrow beside the column name or right click and select a column name.
6. To select a record, double-click the record or highlight the required one and click Select.
7. The File Opening Info topic appears, with previously entered information in the fields.

TO OPEN AN EXISTING TRANSACTION RECORD FROM A LIST OF RECENTLY OPENED TRANSACTIONS

1. Double-click a record from the list of recently opened transaction records or highlight the required one and click Select.
2. The File Opening Info topic appears, with previously entered information in the fields.

TIP | The Notes topic opens if **Show Notes On Open** was selected.

Closing a Transaction Record

1. On the Record tab click the "x", **OR** press Ctrl+F4.
2. The transaction record closes if it was not modified, but The Conveyancer window remains open. If you modified the transaction record, you are prompted to save it.

Saving a Transaction Record

1. On the record toolbar click the , **OR** press Ctrl+S.
2. The transaction record is saved and remains open.

Copying a Transaction Record

1. Open the Source record that you want to copy.
2. Click the Edit/Copy button in Tab A (beside the Record No.) If the Record is copied it is given a new file number, record number and Teraview number. As well a new title insurance policy will be assigned.
3. Change the transaction record number (and any other data to be modified).
4. Save the record under the new transaction record number.

Deleting a Transaction Record

1. Open a new or existing record of the same type as you want to delete (ie. open a Purchase Record if it is a Purchase Record you want to delete), as long as it is not the record you are going to delete.
2. On the Records menu, click Delete. The Delete Records box appears.
3. Double-click the row containing the record that is to be deleted, or place a checkmark beside the record. You may delete more than one record at a time.
4. Click Process or press F2. The Delete Record(s) box appears.
5. Indicate whether you want to delete all the selected transaction records, their Polaris forms and/or their associated produced documents, and click OK.
6. Click OK. The record is deleted.
7. Click OK for the next record. Repeat these steps for any other records you may have selected.

Exporting a Transaction Record

1. Open a new or existing record of the same type as you want to export (ie. open a Purchase Record if it is a Purchase Record you want to export, as long as it is not the record you are going to export.
2. On the Records menu, click Export. The Export Records box appears.
3. Double-click the row containing the record that is to be exported, or place a checkmark beside the record. You may export more than one record at a time.
4. Click Process or press F2. The Select Export Directory box appears.
5. Browse to a directory and click OK. The Export confirmation box appears indicating that the transaction record export (for one or more records) was completed successfully.

Importing a Transaction Record

TO IMPORT A RECORD

1. Open a new or existing record of the same type as you want to import (ie. open a Purchase Record if it is a Purchase Record you want to import, as long as it is not a record with the same record number as the one you are going to import.)
2. On the Records menu, click Import. A submenu appears.

TO IMPORT PURCHASE RECORDS FROM DISKS

1. In the Select Import Directory box, select the path or directory where the required record(s) are located and click OK. The Import Records box appears.
2. Double-click the row containing the record that is to be imported, or place a checkmark in the box for the required records. You may import more than one record at a time.
3. Click Process or press F2. An Import confirmation box appears, stating that the record was successfully imported.
4. Click OK. The Import confirmation box closes. If there is an existing transaction record with the same record number, you are prompted to overwrite the current record.

TIP Sometimes, an error message appears if the LOFTI policy numbers have already been assigned.

TO IMPORT A SALE OR MORTGAGE RECORD

1. In the Import a Record box, double-click the required record, or highlight the required record and click Select.
2. If you selected “Import a Sale record (acting for both sides)” the record is imported. If you selected “Import a Sale record (Vendor is now buying)” or “Import a Mortgage record”, a message appears checking if you want to import the information.
3. Click Yes. The record is imported.

Secondary Databases

Secondary Databases

Secondary databases store other frequently used data which is used to facilitate data entry within a transaction record i.e. Solicitors, parties, jurisdictions, mortgagees, etc.

1. Simply enter the new data once, by clicking the **add** button, enter your information into the required database; then, for all future deals for which that information is required, you need only **select** their entry from a list.
2. A secondary database associated with a particular field is invoked either by pressing the F9 key or by clicking the adjacent to the field.
3. Then, highlight the desired entry by keying in the first few characters of the name. Alternatively, you can use the arrow keys or the mouse.

TIP | Secondary databases may also be accessed by clicking the Databases button - since the database is not then associated with a particular field in the transaction record, the select button is disabled. Nonetheless, this provides a convenient method to look up a phone number or other information about a party, or to send an email or to simply update information by clicking on the edit or delete button.

Entering Basic File Information

Entering Basic File Information | Tab A

The File Opening Info topic is the place where you enter basic information about the transaction record. The fields in this topic differ, according to whether you have opened a Purchase, Sale or Mortgage record and depending on the province where the application is being used.

Each transaction record within the Purchase, Sale, or Mortgage database requires a unique transaction record number, consisting of up to eight characters (letters and/or numbers). This number may be the same as the file number.

In the Registration method field, you can choose to register forms electronically or manually.

When doing Purchases and Mortgages, you will be prompted to identify if the transaction title is to be insured. You may select Stewart Title Guaranty Company (STGC), First Canadian Title (FCT), Chicago Title Insurance Company or Travelers Guarantee Company of Canada. The Title Insurance topic becomes available and the label changes to LOFTI. The screen displays the fields applicable to the selected Title Insurer.

Note that Travelers is only available for new construction purchases for which transaction data has been posted on www.convey.ca.

Tab B

Entering Basic File Information | Tab B

This is the topic where you enter information about your client.

1. Click to find an existing client in the parties database or click on to add a new party to the database. This can also be completed in tab A beside Client's surname. Enter client's name, address and phone numbers on the General Tab.

IF IT IS A NEW PARTY

2. Click on the required party and Select. The Client Name(s) box appears.
3. In the Capacity area, if there is only one party, click registered owner or other (capacity to be specified). If there are two or more parties, select the appropriate entry in the Capacity area, then, if appropriate, select a Capacity and enter a Share, if applicable.
4. Click OK. The information appears in the Purchaser(s), Vendor(s) or Mortgagor(s) field.
5. To view the title details in a Purchase or Mortgage, click the .

TIP | To edit the Capacity from the eye icon field click F9. The parties' data will be displayed.

6. In a Purchase, remember to enter the Offerors – the names of those who signed the Agreement of Purchase and Sale.

TIP | If you do not enter the Offerors there will be no signing lines in the Direction Re Title – called DIRNTITL.P

Entering Spousal Status Statements

Based on the spousal status statements of the parties, The Conveyancer will generate and display the text format spousal status statement(s). You can override the statement and modify the wording, as required.

TO OVERRIDE THE SPOUSAL STATUS STATEMENT

1. Click Check to override Spousal Status Statement(s).
2. Type text in the box or click . The Predefined Spousal Status Statements box appears.
3. Select a statement and click Insert to add the select statement to the current text or Replace to replace the current text with the selected statement.

TIP | As good practice, and to keep your database up to date, you may want to change the spousal status in the parties' database.

SPECIFYING ENVELOPE SALUTATION

In the two fields provided for this purpose (Envelope Salutation and Env. Sal. cont'd), enter the manner in which correspondence should be addressed to this party. Usually, the second field will remain blank, unless you are dealing with a corporation.

TIP | Pressing F9 will toggle through possible responses to this field.

Client Information Request Form (CIRF)

1. Open a record and give it a record number.
2. Communicate with the client - you should obtain the client's email address and provide the record number to the client.
3. In Tab B enter your client's email address and select Send Information Request Form to Client. Click Send Invitation.
4. When your client receives your email, he/she will click on the link, enter the record number (which was previously communicated to them by your office), checks the "I agree" for the Terms and Conditions and then clicks the Submit button.
5. Your client fills out the form and clicks the Submit button.
6. Your client has the option of printing or closing the form.
7. The form is then sent to your TDX inbox, which you may access from Tools → TDX Inbox (you may have to "push" the email through by clicking Check for New Messages) or on the Home page.
8. Open the message
9. Click on Compare/Import
10. The Compare/Import window opens where you will compare your data to that of the client. Select either accept or decline.
11. For any new or existing mortgage and insurance information that is provided by your client will be entered in the Client data column. A sticky for each of your client's notes for mortgage and insurance information will be entered onto each tab and into the notes tab for easy reference at a later date.
12. Select Import and all information will be imported into the record in the correct tabs and the correct fields.

Other Party Information | Tab C

Enter information about the other party and the other party's solicitor. In a Purchase transaction record, you enter information about the vendor and the vendor's solicitor. In a Sale transaction record, you enter information about the purchasers and the purchaser's solicitor. In a Mortgage transaction record, you enter information about the other solicitor only if there is another solicitor and if the principle is over $50,000

TIP	On institutional refinance mortgages, solicitor information may be entered in Tab G if there is one.

Tab D

The Subject Property | Tab D

The Subject Property topic is the place where you enter all of the required information about the property that is being bought, sold, or mortgaged.

1. Jurisdiction.
2. Property Address.
   - Legal Description including lot, plan, part lot, reference place, parcel section.
   - If the property is a condo, enter the Unit, Level and Condo Corporation number.
   - The City and Municipality are populated upon selecting the appropriate Jurisdiction from the database (If these fields are not completed automatically, you should enter the appropriate data for that jurisdiction into the Jurisdictions database).
3. First four digits of the Roll Number.
4. The Registry Office field (provided that a response was also entered in the Registry/Land Title field of the Jurisdictions database).
5. PIN number should be entered here.
6. Last Transfer number should be entered here.

TIP | Note that the fields in this topic change, depending on whether the property is a condo or not.

Tab E

Consideration & LTT topic | Tab E
For a Purchase File

The Consideration & LTT topic provides a breakdown of the purchase price, as it should appear in the Land Transfer Tax Affidavit. The last field displays the amount of tax payable.

This topic supports residential and commercial transactions. It also supports calculation of the City of Toronto Municipal Land Transfer Tax Affidavit and LTT Refund.

TIP | The LTT Affidavit and the LTT Refund Affidavit are printed From the Forms tab when it is a manual Registration.

Compliance Letters
For a Purchase File Tab F, for a Sale or Mortgage File Tab E

From this topic, specify whether compliance is required, and then keep track of the responses. All department names, addresses, phone and fax numbers and their fees for each required search are populated from the Jurisdictions database directly into the appropriate Tab for compliance letters.

Entering Existing Mortgage Information | Tab F
For a Sale or Mortgage file

For Sale and Mortgage transaction records only, you can enter data for up to four existing mortgages. For a Sale, the mortgages can be either assumed or discharged. For a Mortgage, the mortgages can be either discharged or remain on title.

TO ENTER DATA FOR EXISTING MORTGAGES

1. In the Number of Existing Mortgages box, select the required number.
2. Fill in the fields, as required. Note that depending on the entered data, additional fields may appear.
3. A mortgagee's name can be imported from the Mortgagees Database by clicking .
4. If you indicated more than one existing mortgage in step 1, click the next subtopic tab and enter the required information for the next mortgage.

Entering Mortgage Financing Information | Tab G

TO ENTER MORTGAGE FINANCING INFORMATION FOR A PURCHASE OR SALE TRANSACTION RECORD

1. In the Mortgages or VTB Mortgages topic, select the number of mortgages and click OK.
2. For a Purchase transaction record, the three subtopics for each mortgage appear. Skip to step #5.
3. For a Sale transaction record, a Priority of Mortgages button appears beside the Number of VTB Mortgages box. Click Priority of Mortgages, select the required mortgage, and select the priority in the Priority of VTB Mortgage box.
4. Repeat step #3 for all of the other VTB Mortgages. Once you have selected a priority for the last mortgage, the three subtopics for each mortgage appear.
5. Fill in the Mortgagee and Mortgage Terms topics for each mortgage. (Complete the Reporting Info topic only following closing.)
6. For Purchase transaction records only, in the Mortgagees subtopic, Interim Enclosures field, and in the Reporting Info subtopic, Final Report Enclosures field, (available only when you are reporting to the mortgagee), press F9 or click the . The Interim Report to Mortgagee Enclosures box (or Final Report to Mortgagee Enclosures box) appears.
7. Click a field in the Included column and press SPACEBAR to toggle between No and Yes.

TO ENTER MORTGAGE FINANCING INFORMATION FOR A MORTGAGE TRANSACTION RECORD

1. Click Priority of New Mortgage.
2. Select the priority number.
3. Fill in the Mortgagee and Mortgage Terms topics for the mortgage. (Complete the Reporting Info topic only following closing.)

Tab H

Entering Condo Corporation Information
Tab H For a Purchase or Mortgage, Tab I for a Sale

This tab becomes available if you indicate in the Subject Property topic (Tab D) (in the "Is this a condo?" field) that the property is a condominium.
Enter all the contact information about the condominium corporation. If the Condominium Corporation database is filled out, select the required corporation and the fields will be filled in automatically.

Entering a Real Estate Broker and Real Estate Commission | Tab H
For a Sale

In this topic, you are required to enter the contact information for a real estate broker, and indicate whether the commission is based on a fixed percentage of the sale price.

If the commission is based on a fixed percentage, The Conveyancer automatically inserts the other data, taking the values from the Sale Price and Deposit entered into the Statement of Adjustments topic.

TIP | Enter sale price and deposit into Statement of Adjustments first.

If the commission is not based on a fixed percentage, you will have to enter the commission value.

NOTE: If the amount of the commission held by the Real Estate Broker is greater than the amount of the Commission plus HST then the excess commission would be payable to the vendor. The letter in dv.s would change to reflect the same and a direction to the Real Estate Broker becomes available in the document production list as dirn_reb.s should the balance be made payable to anyone other than the vendor.

Tab I

Including Fire Insurance Information | Tab I
For a Purchase or Mortgage, Tab J for a Sale

FROM THIS TOPIC, ENTER INFORMATION ABOUT THE FIRE INSURANCE COVERAGE FOR THE PROPERTY.

For Purchase and Mortgage transaction records, this topic is always available.

For Sale transaction records, this topic only becomes available once you select one or more Vendor Take Back (VTB) mortgages in Tab G.

Tab J

Preparing a Report to the Purchaser | Tab J
For a Purchase

Enter the information to be included in a reporting letter on a Purchase transaction into this tab.

TIP | This topic should not be filled in until the purchase is complete.

TO ENTER QUALIFICATIONS AFFECTING TITLE

1. Fill in the Report to Purchaser topic, as required.
2. In the Qualifications affecting title field, click . The Qualification Affecting Title box appears.
3. Type the required text.

OR

I. Click Precedents/Requisitions. The Retrieve Precedent box appears
II. If you choose Retrieve a Precedent from disk, a box appears where you select the required precedent, and then the clause appears in the Qualification Affecting Title box. If you choose any of the other options, the matching paragraph from Requisitions (Tab L) appears in the Qualifications Affecting Title box (as long as it exists).

4. Click OK. The beginning of the precedent appears in the Qualifications affecting title field

OR

I. Click Save Precedent. The Save Precedent box appears.
II. Enter a name for the precedent and click OK. The precedent is stored in the TCWIN\MASTERS\CLAUSES directory.
III. Click OK in the Qualification Affecting Title box. The beginning of the precedent appears in the Qualifications affecting title field.

TO GENERATE DETAILED SUMMARIZING TEXT FROM THE STATEMENT OF ADJUSTMENTS

1. Complete the Statement of Adjustments topic of the transaction record (Tab N) to correspond with the vendor's Statement of Adjustments.
2. In the Report to Purchaser topic, select Yes for the Provide detailed explanation of Statement of Adjustments field. The field name changes to Provide details of SOA, based on BDOC of $0.00. (SOA is Statement of Adjustments, BDOC is Balance Due on Closing, and $0.00 changes to the balance appearing in the SOA.)
3. In the same field, click the or press F9. The Statement of Adjustments – Actual Credits box appears.
4. For each adjustment except Sale Price and Deposits, enter the amount of credit allowed to the purchaser or the vendor in the Statement of Adjustments prepared by the vendor's solicitor or press F9 to automatically input the number existing in the Statement of Adjustments topic for the current Purchase transaction record.
5. Verify that the Balance Due on Closing is identical to the value entered in the vendor's Statement of Adjustments.
6. Note that values entered in this dialog are adopted by the trust ledger and the reporting letter, overriding those entered in the statement of adjustments.
7. Click View/Print Summary to view the text which will comprise the detailed explanation of the Statement of Adjustments.
8. Click the to open the Print Setup box and print the summary.
9. Click the to close the summary. The Report to Purchase topic reappears.

TIP | To provide details in the report with respect to information regarding taxes, complete each field. In the field Future Payments you can advise if money has been paid from trust, information with respect to upcoming payments, instruct purchaser to call tax department or not to instruct purchaser at all.

Adding Notes | Tab K
For a Purchase or Sale, Tab J for a Mortgage

The Notes topic opens an editor into which you may type whatever you like about the transaction record. This text is saved with the record and may be reviewed and edited at a later date by opening the transaction record and re-accessing the Notes topic.

TO WORK IN THE NOTES TOPIC

1. Open the Notes topic. The Notes topic appears.

YOU MAY DESIGNATE THAT THE NOTES TOPIC IS TO BE DISPLAYED WHEN THE RECORD IS FIRST OPENED (Instead of the File Opening Info topic).

1. Select Show Notes on Open. The next time you open this transaction record, the Notes topic appears first.

YOU MAY ALSO PRINT THE CONTENTS OF THE NOTES TOPIC.

1. To print the contents of the topic, click the .

YOU CAN ALSO CHANGE THE BACKGROUND COLOUR FROM WHITE TO RED OR GREEN, TO MAKE THE NOTE STAND OUT WHEN IT IS OPENED. (The background colour does not appear on the printout).

1. To select the background colour, click none, red or green.

Tab L

Working with Requisitions | Tab L
For Purchase, Tab K for Mortgage

The Requisitions topic is used to record the requirements needed to carry out the Purchase or Mortgage transaction record (for example, a discharge of a mortgage on the property).

ADDING A REQUISITION

1. In the Requisition topic, click Add. The Select a Requisition File box appears.
2. Highlight the required requisition file and click select. The Requisition Editor Box appears containing the selected requisition.
3. In this box, you are required to merge the existing text for the requisition file with the data necessary to complete the selected requisition. The body of the requisition is displayed in the upper half of the box, with stop codes (i.e. positions at which keyboard input is required) flagged with markers. The first stop code is highlighted, and a prompt is displayed in the lower portion of the box which relates specifically to the current stop code.
4. Enter your response in the field provided and press Enter or click Proceed. Your response is inserted into the body of the requisition in place of the marker. The procedure advances to the next stop code.
5. Enter responses for each field code and click Proceed. Once you fill in the last field code, the Save/Cancel box appears. Assuming that the predefined requisition was structured properly, details of the requisition and the undertaking required of the other side to discharge it will be inserted automatically into several header fields, displayed at the top of the Requisitions Editor box.
6. Edit the text, as required.
7. To format, select the required text and click one of the following: bold the text, underline the text, italicize the text and normalize the text.

CLICK OK. THE STATUS OF REQUISITION BOX APPEARS WHERE YOU MAKE YOUR SELECTION OF:

1. Resolved
2. Accept Undertaking
3. Require Actual Discharge
4. Waived
5. Resolved

- Click OK. The Requisitions topic reappears with the added requisition. As requisitions are added they are listed one under the other.
- Click OK. The Particulars of encumbrance appears with the added requisition.
- To change the general status of a requisition, select the required requisition and press Spacebar or click Status until the desired response (Unresolved, Accept Undertaking, Req. Actual Discharge, Waived (accepted), or Resolved) appears in the Status column.
- To change the Group ID status, select the required requisition and click until the required option appears.

TIP | Only those requisitions toggled as Accept Undertaking will appear in the Undertakings of the document DV.P

TO EDIT OR COPY A REQUISITION

1. Select the required requisition in the Requisitions topic.
2. Click Edit or Copy. The Requisitions Editor box appears, with the data for the current requisition.
3. Change the data in both the top and bottom sections, as required, and click OK. If you click Edit, the data is updated. If you click Copy, a new requisition appears in the topic.

TO DELETE A REQUISITION

1. Highlight the required requisition and click Delete.

Tab M

Working with Undertakings | Tab M
For a Purchase, Tab L for Mortgage and Sale

TO ADD AN UNDERTAKING

1. In the Undertakings Given (for a Sale or Mortgage) or Undertakings Received (for a Purchase) topic, click Add. The Undertaking Editor box appears.
2. In the Undertaking to field, enter the subject of the undertaking. For Undertakings Given, this header may be used in document production. Format your response for insertion into a sentence that begins with the words "With respect to our undertaking to" (e.g. pay the 2009 tax arrears).
3. In the main body, type the undertakings the vendor's solicitor must perform. Note that paragraph numbering and punctuation to separate paragraphs will be inserted automatically during Document Production. Therefore, do not insert a period after the last word of an undertaking.

OR

i. Click Retrieve Precedent. The Retrieve Precedent box opens.
ii. Select the required precedent and click OK. The precedent text appears in the main body.

4. If you typed text into the main body and you want to save the text so it can be retrieved in another transaction record, click Save as Precedent. The Save Precedent box appears.
5. Give the precedent a name and click OK. The precedent will then be saved for future use.
6. To create a task with a follow-up date for the undertaking, click the box for Create task with specific follow-up date and enter the date.
7. Click OK in the Undertaking Editor box. The undertaking appears in the Undertakings Given or Undertakings Received topic, with the status Outstanding. The text of the undertaking appears in the bottom part of the screen. As undertakings are added they are listed one under the other in the top part of the screen.
8. To change the status, select the required undertaking and press Spacebar or click Status until the desired response (Fulfilled or Outstanding) appears in the Status column.
9. Once the mortgage has been discharged, change the status to Fulfilled, record the discharge particulars in the Discharged by Instrument No. and registered on fields. Instrument No. and registered on fields.

TIP | Maintaining the proper status on undertakings makes usage of the Advanced Search (List) feature for reporting on outstanding undertakings very powerful.
Document DV.p and on the subject to undertaking screen Tab M for a Purchase and Tab L for a Mortgage.

TO EDIT AN UNDERTAKING

1. Select the required undertaking in the Undertakings Given or Undertakings Received topic.
2. Click Edit. The Undertaking Editor box appears, with the data for the current undertaking.
3. Change the data, as required, and click OK. The data is updated.

TO DELETE AN UNDERTAKING

1. Highlight the required undertaking and click Delete.

NOTE: You cannot delete undertakings that were automatically generated by The Conveyancer.

Tab N

Preparing a Statement of Adjustments | Tab N
For a Purchase, Tab M for a Sale

The Statement of Adjustments topic is used to calculate the balance to be paid to the vendor on closing. The first adjustment field is reserved for the sale price and the second is reserved for the deposit. Once you have entered an Adjust date, you can add items (adjustments) whose costs need to be divided between the parties (e.g. taxes, insurance payments, etc.).

TO ADD AN ADJUSTMENT

1. If the date of closing is not the same date as the date that the adjustments are being calculated, in the Statement of Adjustments topic, click Adjust Date. The Adjust Date box appears. If you select Yes for Adjust as at Closing Date, the closing date entered in the File Opening Info topic appears. If you select No, enter the applicable date and click OK. The date appears in the top left side of the topic.
2. Select Sale Price and click Edit, or press F9, or right-click. The Adjustment Type box opens for the Sale Price adjustment. Note that the fields in this box change, depending on the selected adjustment. For all Adjustment type boxes, the upper part contains the data-entry portion and the bottom part displays the wording, calculations, and amount of credit. Enter the data in the fields and click OK. The Sale Price appears in the Credit Vendor column.

TIP | Sale Price adjustment contains the option to net out GST/HST, affecting further calculations.

3. Select Deposit and click Edit, or press F9, or right-click. The Adjustment Type box opens for the Deposit adjustment. Enter the data in the fields and click OK. The Deposit appears in the Credit Purchaser column.
4. In the next empty row, click Edit, or press F9, or right-click. The list of adjustments appears.
5. Select one of the adjustments in the list. The Adjustment Type box opens for the selection.
6. Enter the data in the fields and click OK. The adjustment appears in the topic. Depending on the adjustment and your responses, the amount appears in either the Credit Vendor or Credit Purchaser column.
7. To switch from a view with details of each adjustment to no details, click Toggle Details. The view changes to one adjustment per line.
8. To modify the Payable to recipient name and to change the wording of the section, click Edit Payable To. The Payable to box appears.
9. Change the name and/or click the option boxes, if required.

10. Click OK. The name is updated in the lower, left corner of the Statement of Adjustments topic.
11. To change the heading information as it appears in the viewed and printed Statement of Adjustments, click Edit Heading Info. The Statement of Adjustments Heading Info box appears.
12. Make the required adjustments, either by typing the new headings or selecting from the available list, and click OK. The Statement of Adjustments Heading Info box closes.
13. On the View/Print menu, click View/Print Statement of Adjustments. The Statement of Adjustments view appears.
14. If required, edit the text relating to any adjustment (changes will not be saved).
15. Click the to print, or the “x” on the tab to close.

TIP | Document Production also provides a word processor version of the statement of adjustments for Sales called SADJDIRN.S.

EDITING, COPYING, MOVING, OR DELETING AN ADJUSTMENT

- To edit an adjustment, select the required adjustment in the Statement of Adjustments topic and click Edit or press F9, or right-click. In the Adjustment Type box, correct the required fields.
- To copy an adjustment, select the required adjustment in the Statement of Adjustments topic and click Copy. Click an empty row where you want the copy to appear.
- To move an adjustment, select the required adjustment in the Statement of Adjustments topic and click Move, and left-click an empty row.
- To delete an adjustment, select the required adjustment in the Statement of Adjustments topic and click Delete.

Preparing a Direction re: Funds | Tab N
For a Sale

Use the Direction re: Funds topic to specify the names of cheque payees and the amounts of their respective cheques.

This topic is only available in a Sale transaction record and should be accessed only after completing the Statement of Adjustments. When it is first accessed, all fields will be blank, except that the amount of the Balance Due on Closing (taken from the Statement of Adjustments) appears in two places – at the top and bottom of the topic.

BALANCE OF FUNDS PAYABLE TO

In the Balance of Funds Payable To field, enter the name of the payee or press F9, the name of the payee on the Statement of Adjustments and F8 will automatically enter your clients' names (likely your clients or your firm, in trust). If you click on the 🔍 a list of payees will appear who will receive the funds that were not allocated to cover specific amount cheques. Once you enter data in this field, you will be able to enter payees and corresponding amounts for cheques. Each time you enter an amount in one of these fields, the amount appearing in the Balance of Funds Payable To field is reduced accordingly.

TO ENTER PAYEE OF A SPECIFIC AMOUNT CHEQUE

1. In the Direction re: Funds topic, in the First Payee of specific amount field, do one of the following:
   - Press F9, right click or click on the flashlight. A list of payees will appear. Click on one of these payees. If you have entered a dollar amount on another tab or task then this amount will automatically be entered into the amount of the cheque payable **OR**
   - Type the name of the individual or firm that will receive the funds not allocated elsewhere. The Additional Payee Names fields become available and enter the amount of the cheque payable.
2. In the first field for the Additional Payee Names, do one of the following:
   i. Type the name of the payee who will receive a cheque. The Cheque Amount field becomes available.
   ii. Type the Cheque Amount.

OR

   i. Click the flashlight icon. A list of payees and amounts payable where applicable will appear.
   ii. Click the required payee. The payee name and the amount appear in the fields.
3. Repeat step 1 for as many payees and cheques as required.
4. On the View/Print menu, click View/Print Direction re: Funds. The view mode of the Direction re: Funds topic appears. In this mode, you can edit the text comprising the direction, but not the payees or corresponding amounts.
5. Click the 🖨 to print the Direction re: Funds **OR** Click the door icon to close the view mode and return to the Direction re: Funds topic.

TIP | Document Production also provides a word processor version of the direction re: Funds at the top of the statement of adjustments called SADJDIRN.S.

Preparing Execution Affidavits | Tab O
For Purchase and Sale, Tab M for Mortgage

The Execution Affidavits topic automates the preparation of a client's and/or solicitor's declarations regarding similar name executions.

The information entered into this topic appears in the Master Document EXCNAFF#.PSM, when it is run during Document Production. This Master Document, which should not be renamed, is structured so that the document produced will be automatically formatted according to whether it is a solicitor's or client's declaration and whether it is for use in Registry or Land Titles. Also, paragraph numbering will be inserted automatically.

TO CREATE A DECLARATION

1. In the Execution Affidavits topic, click New Decl or press Shift+Ins. The New Declaration box appears.
2. Select the required option (Client, Solicitor, or Power of Attorney), enter the clients, solicitor or powers of attorney names manually or click F9 (you can toggle between clients as well) in the bottom part of the box, and click OK. The highlights of the declaration appear in the Execution Affidavits topic and the text of the declaration appears at the bottom of the topic.
3. If you have specific information about a judgment that you want to enter into the affidavit:
   i. Click Add Para or Press Ins. The Keyboard Merge box appears.
   ii. Enter your response in the field provided and click Proceed. Your response is inserted into the body of the paragraph in place of the marker. The procedure advances to the next stop code.
   iii. Enter responses for each stop code and click Proceed. Once you fill in the last stop code, the Paragraph Editor box appears.
   iv. Change the text (if required), and click OK. The highlights of the paragraph appear below the declaration and the paragraph text appears at the bottom of the topic.
4. If you want to create a blank statement that might be completed later, click Add Blank Para.
5. Repeat step 3 if additional paragraphs are required.

6. To “open” a closed folder for a particular declaration, press +. The list of paragraphs in the declaration is displayed.
7. To close an open folder for a particular declaration, press -. The list of paragraphs in the declaration is no longer displayed.

COPYING, EDITING, OR DELETING A PARAGRAPH IN A DECLARATION

- To copy a paragraph, in the Execution Affidavits topic, drag the required paragraph to the destination declaration (but not to a paragraph within the destination declaration).
- To edit a paragraph, in the Execution Affidavits topic, select the required paragraph and click Edit. In the Paragraph Editor box, correct the required fields.
- To delete a paragraph, highlight the required item in the Execution Affidavits topic and click Delete.

Preparing a Statement of Account | Tab P For Purchase or Sale, Tab N for Mortgage

TO WORK IN THE STATEMENT OF ACCOUNT

TIP | If you check the box Calculate fee based on an all inclusive price of: $ (enter all inclusive amount). The fee amount will be allocated properly dependent on the disbursement amount entered.

1. To move between the Description and Amount fields, press Tab.
2. To move from one disbursement to the next, press the up or down arrows.
3. For cells containing default amounts, press F9. (If a default response is available, it will be stated in the Help Line.)
4. To change the width of columns or the height of rows, drag the boundary lines.
5. To access additional options, right-click or press F8 in the required cell. A submenu with the following options appears:
   - Insert New Row Above Cursor Position. This can also be completed by clicking on the Insert Row button.
   - Delete Highlighted Row You will be asked to confirm this action. This can also be completed by clicking on the Delete Row button.
   - Edit Current Cell (F2 or Just Start Typing) (You can also double-click the cell to start editing.)
   - Insert Additional Fee (Upper Position) – Inserts a row above the OUR FEE for acting on purchase/sale/mortgage row.
   - Insert Additional Fee (Lower Position) – Inserts a row below the OUR FEE for acting on purchase/sale/mortgage row.
6. Select the required option and enter the required information. The Statement of Account changes accordingly.
7. To reset the Statement of Account for the current transaction record (revert to the text and values that existed before editing), click the Reset button. A warning screen will appear indicating that all this will reset the Statement of Account to the default values: Your information will be lost. Do you wish to proceed?
8. Return to the Statement of Account topic, or select any other topic.
9. The statement of account can be produced directly from Tab P by clicking on the Produce button. The master is imported and the option of creating a Word, WordPerfect or PDF version is given.

Preparing a Trust Ledger Statement | Tab Q
For Purchase and Sale, Tab O for a Mortgage

TO WORK IN THE TRUST LEDGER STATEMENT

1. To move between the Explanation and the Expenditures or Receipts fields, press Tab.
2. To move from one disbursement to the next, press the up or down arrows.
3. If The Conveyancer can ascertain, based on data entered into the transaction record, the (likely) amount of a receipt or expenditure, press F9. (If a hint is available, it will be stated in the Help Line.)
4. If Pay Bills or Debts has been completed in Tasks, select Other Expenditures /Tasks /Pay Bills or Debts.
5. To change the width of columns or the height of rows, drag the boundary lines.
6. To access additional options, right-click or press F8 in the required cell. A submenu with the following options appears:
   - Insert New Row Above Cursor Position. You will have to specify whether the new row will be Expenditure or a Receipt. This can also be completed by clicking the Insert Row button.
   - Delete Highlighted Row You will be asked to confirm this action. This can also be completed by clicking the Delete Row button.
   - Edit Current Cell (F2 or Just Start Typing) (You can also double-click the cell to start editing).
   - Itemize Highlighted Row – see instructions below.
   - Change Expenditure to Receipt or Change Receipt to Expenditure Switches the cell where you specify the dollar amount for the expenditure.
   - Set Default Size of Rows and Columns – Opens the Trust Ledger Table, where you can change the width and height of the columns and rows in the table.
7. Select the required option and enter the data, if required. The Trust Ledger Statement changes accordingly.
8. To reset the Trust Ledger Statement for the current transaction record (revert to the text and values that existed before editing),

ITEMIZING A ROW

1. Click the required row.
2. Click on the Itemize Row button.
   The Itemize Expenditure box for the selected explanation opens.
3. Click the required Item cell and type the description.
4. Click the required Amount cell and type the amount.
5. Click one of the following:
   - Insert new row above cursor position.
   - Delete highlighted row.
6. When you have finished adding items, click OK.
7. The itemized row appears in the Trust Ledger topic in green text.
8. To reset the Trust Ledger Statement for the current transaction record (revert to the text and values that existed before editing), click on the Reset button. A warning screen will appear indicating that this will reset the Trust Ledger Statement amount to the default values. Your changes will be lost. Do you wish to proceed?

TIP | The Trust Ledger Statement can be produced directly from Tab Q by clicking on the Produce button. The master is imported and the option of creating a Word, WordPerfect or PDF version is given.

The account and trust ledger (itemized) can be produced as a fund summary through document production as fund_sum.psm

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Tab R

Preparing a Response to Requisitions | Tab R
For Sale file

Use the Response to Requisitions topic to respond to any requirements on behalf of a purchaser or a mortgagor. Since this topic acts as a clauses editor, you can either enter large amounts of text or insert (and save) existing precedents.

During document production, the text appearing in this topic will be merged with the Master Document lrespreq.s to create a letter responding to requisitions.

When you first open the topic, the editor is already formatted to receive the responses for requisition numbers 1 through 5.

TO PREPARE A RESPONSE TO REQUISITIONS

1. In the Response to Requisitions topic, enter the Date of Requisition Letter, and answer: Were requisitions submitted on time?
2. Type the required response(s) after each number.

OR

   i. Click to the right of the required paragraph number and right pointing chevron (»).
   ii. Click Retrieve Precedent. The Retrieve Precedent box opens.
   iii. Select the required precedent and click OK. The precedent text appears in the selected location.

3. To insert a character which will be converted into a tab, indent, or automatic paragraph numbering character during document production, click the required location, press F8 **OR** right-click, and select Indent, Tab, **OR** Para No. The selected character is included, where » represents an Indent, ¬ represents a Tab, and § represents a Para No.

TO SAVE TEXT AS A PRECEDENT

1. In the Response to Requisitions topic, delete all extraneous (i.e. non-precedent) text from within the editor.
2. Click Save as Precedent. The Save Precedent box appears.
3. Type the precedent name and click OK. The precedent is saved. It can be retrieved with Retrieve Precedent.

Document Production

Document Production

Document Production is the process by which The Conveyancer generates various documents (other than electronic forms) for review, editing and printing from your word processor. To access Document Production from within a transaction record:

1. Select Document Production from the Topics menu.
2. Select the ALL category file.
3. Select each of your documents by checking the box.
4. Once all the documents have been selected simply click on the Produce button or select F2.
5. Select either OK or Open All. OK will save the documents to your DP filer. Open All will open the documents in your word processor.

6. If you click "Ok" you will notice the Produced and Missing Fields columns. In the Produced column the document production date and time appear along with an icon to the word processor or a PDF version of the document. To view either document simply click on the icon.

7. The missing fields indicator allows you to maneuver to each missing field by selecting the symbol or number. When you click this link, a box opens displaying all the fields where data is missing. If you select one of these fields the Missing Fields for Document Production box opens at the top of the record where you can fill in the information and proceed through the document by clicking Next or Previous. When finished, click the Done button where you will be asked if you would like to reproduce the document.

TIP	To access documents that were produced previously open the record and access the DP Filer from the toolbar or from the Document Production topic.

Generating Forms

Generating Forms

To Generate a Form

1. Click Forms. Different forms are displayed, depending on whether Manual or Electronic is selected in the Registration method field in Tab A.
2. Select the form to be produced i.e. E-reg® or Polaris® Transfer, Charge, Lenders Documents, LSUC forms 9D & 9E.
3. The form is printed by selecting the Print Acknowledgement and Direction button for E-reg®, for Polaris, the for Lender Documents, etc.

TIP	Information entered in the record is merged in the forms. The E-reg® form can also be submitted for Uploading to Teraview® by selecting the appropriate button. Once uploaded, the form will have to be imported from within Teraview. Please refer to the Teraview user's guide.

Advanced Search

The Advanced Search feature replaces the List feature.

1. To Run a Predefined Advanced Search, select a search from the drop down and click Search.
2. To create a new search or edit a search, click Manage Search.
3. To create a new search, click new and the Create New Search window opens at the top of a record.
4. You can change the fields from a Purchase, Sale or Mortgage by selecting from the Select field(s) from (show dropdown box)
5. Any underlined field, from any tab, can be dragged and dropped into the Field Label of the Create New Search window.
6. When you have finished dragging and dropping you can Save your search for later use OR simply select Search and your list is displayed.

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