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DONE DEAL  
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# Remote Signing Portal Ontario User Guide

rev. July 14, 2020

## **Disclaimer**

LDD is providing this portal as a free resource for a limited time to facilitate remote signing meetings with clients. It is your obligation to follow any and all requirements from your governing law society, land title/land registry regulations and/or mortgage lenders.

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### BEFORE YOU BEGIN

The steps outlined in this guide are meant to work in conjunction with the **Remote Signing Protocol** and other resources. It's recommend that you refer to the following PDFs as you work through this guide.

Click to download.

[Remote Signing Protocol](#)

[Video Conference Checklist](#)

[Remote Signing Memo to Client](#)

**Note:** It's recommended to send this memo to the client a week prior to your signing meeting.



## Optional Portal Passwords for Your Clients

1. When setting up a portal file, you can create a password for each of your clients.  
**Share this password with your client in a secure manner.**
2. To login to the Remote Signing Portal, they can use this password.
3. For the client to login by answering the security questions, they will click on the blue text below the log in button.

The screenshot shows two main sections. On the left, under the heading "Client(s)", there is a form with the following fields: Name (Lio, David), Mobile, Email (david@lidd.ca), Portal Password (Dog2!), and Code. A red box labeled "1 Optional Portal Password" points to the Portal Password field. On the right, there is a login form with fields for EMAIL ADDRESS and PORTAL PASSWORD, a blue "Log In" button, and a link "Log In With Security Questions". A red box labeled "2 Portal Password" points to the PORTAL PASSWORD field, and another red box labeled "3 Security Question Option" points to the "Log In With Security Questions" link. Below the "Log In" button, there is a note: "By clicking Log In, you confirm that you have read and agree to our Terms of Use".

## Optional Access PIN or LDD Account login for Law Firm

4. To make it easier to login to the Remote Signing meeting for law firms, you can set a **6-Digit Access PIN** on your files. It is your choice whether you use the same PIN for each file.  
**Keep this PIN secure and do not communicate it to your clients.**

The screenshot shows the "Portal Information" settings page. It has four main sections: "Portal is Active" with a "Deactivate" button; "Meeting Time" set to "12 PM"; "Meeting Date" set to "07/JUL/2020"; and "Access PIN" set to "123456". A red box labeled "4 Access PIN" points to the Access PIN field. Below the Access PIN field, there is a note: "Set an optional 6-Digit Access PIN as an alternative way to log in for any firm members on this file." To the right, there is a "Video Conference Method" dropdown menu set to "LDD Meet". Below this, there is a note: "LDD Meet accommodates video conferencing up to 4 people. If more people are joining, schedule separate meetings."

5. You can use the Access PIN to log into the portal, along with your email address. Alternately, you can use your **LDD Account** credentials. Switch between these options by clicking on the blue link below the Log In button

The screenshot shows two login options side-by-side. On the left, the "Access PIN" login form has fields for EMAIL ADDRESS and ACCESS PIN, a blue "Log In" button, and a link "Log In With: LDD Account | Security Questions". A red box labeled "5 Access PIN" points to the ACCESS PIN field. On the right, the "LDD Account" login form has fields for USERNAME and PASSWORD, a blue "Log In" button, and a link "Log In With: Access PIN | Security Questions". A red box labeled "6 LDD Account Option" points to the "Log In With: Access PIN | Security Questions" link. Both forms include a note at the bottom: "LDD Meet™ Video Conference is supported in Chrome & Firefox on Windows, Mac & Android devices, and Safari on Mac & iOS devices."

## Logging into LDD for the first time

### First time Setup for Each Workstation

In Internet Explorer 11, go to [www.ldb.ca/support](http://www.ldb.ca/support), scroll to **Online Utility**. Follow these 5 simple steps.

1. Ctrl-click on the **Adjust IE Settings** link, click on **Run** and follow on-screen instructions and accept everything.
2. Ctrl-click on **64-bit LDD Online Utility**, click on **Save. DO NOT RUN yet.**
3. Close all of your open IE Browser windows. This step is a must.
4. Find where you downloaded **LDDonlineUtility64.exe** and run it now. Follow all on-screen instructions. **If at any point it asks Modify or Repair – choose Repair.**
5. Re-open IE, go to [www.ldb.ca/login](http://www.ldb.ca/login)

### Requirements

Windows 7 or higher  
Internet Explorer 11 (IE11)  
Adobe Reader  
High Speed (Broadband) Internet

### Finding IE11 in Windows 10

1. Open the Start Menu
2. Scroll down to Windows Accessories
3. Open the folder
4. Launch Internet Explorer

### Logging In

1. Enter the **Account, Username** and **Password** provided. Click on the **Login** button.
2. Select your province under the RealtiWeb heading. RealtiWeb will open in a new IE browser tab.

## Creating your First Remote Signing File in RealtiWeb

The screenshot shows the RealtiWeb main screen layout. At the top, there is a navigation menu with 'File', 'Tools', 'Accounting', 'Help', 'Main', and 'Log Off'. Below the menu is a 'Files' section with a table. The table has columns: 'File No.', 'Client', 'Address', 'Closing Date', 'TP Status', and 'PSM'. Below the table are 'VIEW' buttons for 'Recent files', 'Active files', and 'Archived files', and an 'Exit List' button. On the left, there is a 'Controls' panel with 'Create a New File' and 'Find a File' buttons. On the right, there is a 'Calendar' and 'Inbox' section with a table that has columns: 'Posted By', 'Customer', and 'Post Date'.

### RealtiWeb Main Screen Layout

1. **Main** screen link - use this at any time to get back to this screen.
2. **File List** - empty the first time you login. Any files you create will be listed here. The list can be filtered to help you find files faster.
3. Controls area - this is where you'll Create a New File. **Go ahead and click on Create a New File now.**

## The RealtiWeb File Opening Screen

### File Opening Screen

All the fields you need to create a remote signing file are available on this one screen. For a purchase or sale file, fill in the following:

1. **Responsible Lawyer**  
Select from the list by clicking on ellipses [...] button
2. **File #**
3. **Deal Type**
4. **Firm Contact (optional)**  
Select from list by clicking on ellipses [...] button
5. **Purchasers**  
Follow instructions on next page
6. **Vendors**  
Follow instructions on next page
7. **Property Type**
8. **Property Address**  
If no street address, enter **None** in the **Street Number** field
9. **Closing Date**
10. **Contract Price**
11. **Deposits**  
If none, enter **0**
12. **After completing the required fields, click on Continue at the top of the screen.**

The screenshot shows the 'File Opening Screen' with the following fields and callouts:

- 1**: Responsible Lawyer (David Rush\*)
- 2**: File # (Remote Signing Guide)
- 3**: Deal Type (Purchase)
- 4**: Firm Contact (Test User)
- 5**: Purchaser(s) (Ward, Irene)
- 6**: Vendor(s) (Mailing Address)
- 7**: Property Type (Freehold (Fee Simple))
- 8**: Property Address (250 Davisville Ave, Toronto, Ontario M4S 1H2)
- 9**: Closing Date (31/MAR/2020)
- 10**: Contract Price (\$500,000.00)
- 11**: Deposits (\$50,000.00)
- 12**: Continue button (top right)

Other fields include: initials (DBR), Required \*\*, Do you intend to use TitlePLUS for this deal?, Is this a new home purchased from a builder?, Purchaser(s) to reside at property on closing?, Purchaser(s) Mailing Address prior to closing, Other Side's Lawyer, Property Type dropdown, Street Number, Suffix, Street Name, City/Town, Postal Code, Find button, Offer Conditional?, and Requisition Date.

### Mortgage-Only (Refinance) Files

The mandatory fields in a mortgage file are:

1. Responsible Lawyer
2. File #
3. Deal Type
4. Firm Contact (optional)
5. Mortgagors
6. Property Type
7. Property Address
8. Closing Date
9. Mortgage Amount



## Adding Purchasers, Vendors or Mortgagors to a File

Add contact information for your own client(s). The required fields are **Name as Per Agreement**, **Contact Method** (select from dropdown) and applicable **email** or **phone number**. To add another entity, select the red **Add New** link found on the left of the pop-up.

**PURCHASER/TITLE INFORMATION**
Select from List   Close

**Jane Client**   On Title    As per Agreement    Estate    Gender --Select One--

**3 Add New**   Main Contact    Ongoing Relationship

Jane Client,

**1 Name as per Agreement**

**Name on Title**

**2 Contact Method**

Email

Cell Phone

## Initiate the Remote Signing Portal

On the Basic Screen, click on **Initiate remote signing for this file**.

**Purchase File #: 11032019-2**  
**RE: Battistel p/f Battistel and Alfano**

Basic
Mortgages
Issues
Financial
Docs
TitlePLUS

**Basic Information**   Property and Legal Description   Contract Details   Title Search <sup>NEW</sup>   Writ Search <sup>NEW</sup>

**Responsible Lawyer**      **Initials**  

**File #**

**Remote Signing**   Initiate remote signing for this file

### Saving your Files

RealtiWeb automatically creates and saves your file when you click on the blue Continue arrow on the file opening screen. When you're in a file, click on the **blue piggy bank** to save the file.

## The Remote Signing Management Window in RealtiWeb

In this popup you'll find everything you need to setup your client portal for the remote signing session. We've included links to the Remote Signing Protocol, this User Guide and a Video Conference Checklist to use before and during the Remote Meeting with your client.

**LDD Remote Signing Portal Setup**

Remote Signing Protocol
View User Guide
Close

**Clients:** David Lio | **Property:** 2112 Penny Lane, Huron, Ontario L3T 1J4

**Portal Information**

Portal is Active <input type="button" value="Deactivate"/>	Meeting Time <input type="text" value="12 PM"/>  Meeting Date <input type="text" value="07/JUL/2020"/>	Access PIN <input type="text" value="123456"/> <small>Set an optional 6-Digit Access PIN as an alternative way to log in for any firm members on this file.</small>	Video Conference Method <input type="text" value="LDD Meet"/> <small><b>LDD Meet</b> accommodates video conferencing up to 4 people. If more people are joining, schedule separate meetings.</small>
---	--	---	--

**Security Information**

Closing Date 13/JAN/2011	Contract Price 500,000.00	Street # 2	Deposit Total 5,000.00
-----------------------------	------------------------------	---------------	---------------------------

**RealtiWeb Documents**

	DATE UPLOADED	DATE READ
Retainer Terms <span style="color: red; font-size: 0.8em;">remove</span>	06/JUL/2020 - 12:05:25	-

**Upload Documents**

	DATE UPLOADED	DATE READ
SolPS07 <span style="color: red; font-size: 0.8em;">remove</span>	17/JUN/2020 - 15:15:16	-

LDD is providing this portal as a free resource for a limited time to facilitate remote signing meetings with clients. It is your obligation to follow any and all requirements from your governing law society, land title/land registry regulations and/or mortgage lenders.

**Client(s)**

Name: Lio, David  
 Mobile:  
 Email: david@ldd.ca  
 Portal Password:   
 Code:

Irene Ward will be cc'ed on the email. If using LDD Meet, please open the link in the email (using Firefox, Chrome or Safari) to login and start the video conference.

Use our checklist to make sure you don't miss an important step during your video conference.

The **Meeting Date**, **Meeting Time** and **Video Conference Method** are fields based on independent conversations with your client. They are included here for your reference and will be displayed on the client's signing portal. The optional **Access PIN** is used for your easy log into the portal.

The optional **Portal Password** field is used to create a password for your clients to log into the portal. The optional **Code** field is for recording the code you verbally give to your clients during the remote signing meeting. See the Remote Signing Protocol document for more details.

You can use **LDD Meet™**, our own videoconferencing capability, to conduct the remote signing meeting, or you can use another application (Facebook Messenger, Skype, etc.) at your own discretion. The advantage of LDD Meet, is that it works directly in the browser without the need for you or your client to download a separate application.

**Security Information** is displayed from data you entered on this file. This data will be used to automatically create security questions on the portal.

To **Upload Documents** for the client, **convert them to PDF** in your own conveyancing application. Then click on the **Browse** button to find them on your computer. Upload the PDF files one at a time.

**Note:** It's recommended to send the **Remote Signing Memo to Client** prior to sending the email invitation to the client.



## Inviting your Client to the Remote Signing Portal

Once you have uploaded the necessary documents, you can send out the email invitation to your client. The Lawyer and Support Staff listed on the file will automatically be CC'd on this email.

**The email includes a unique, secure link that both you and your client will use to access the portal.**

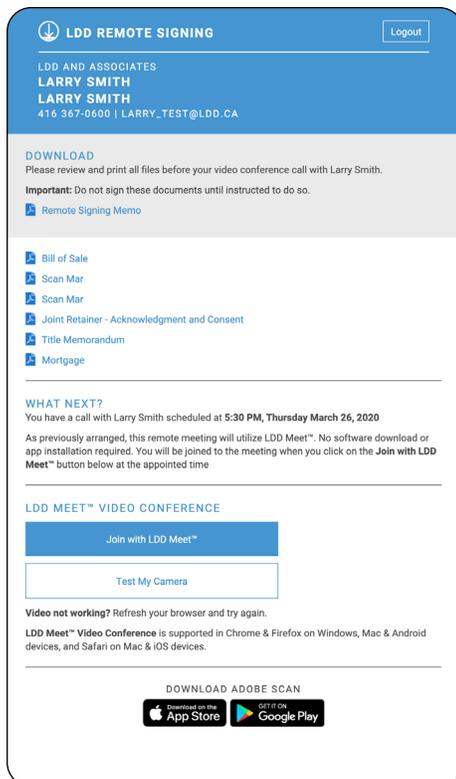
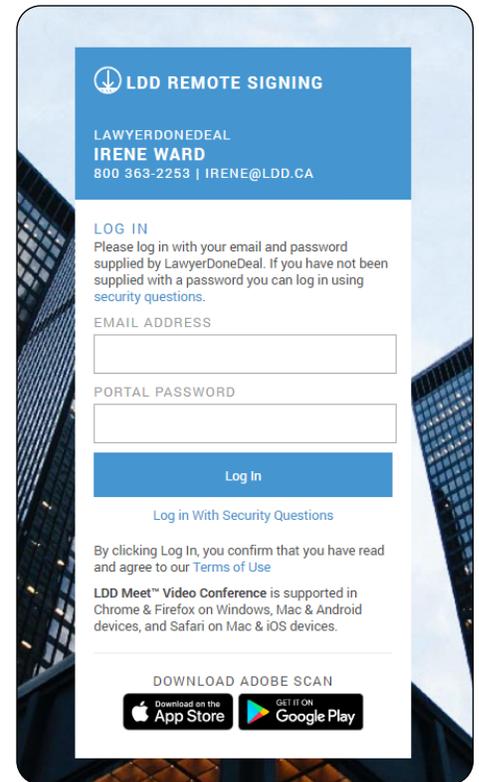
The portal has been optimized for modern browsers and works on desktops, laptops, android phones and iOS (Apple) phones & tablets in the following browsers:

Chrome & Firefox on Windows, Mac & Android

Safari on Mac & iOS (Apple).

**Either the Portal Password or Security questions** will have to be answered correctly to access the portal. Too many wrong answers will lock the portal. If that occurs, open the Remote Signing window in RealtiWeb and click on the blue UNLOCK button. Then Save your RealtiWeb file.

It is assumed you will email the portal invitation to your client in advance of your meeting, giving them time to download and print the closing documents.



## Downloading Documents from the Remote Signing Portal

After successful login, the client can now access the documents for downloading and printing

You can continue to post documents (if necessary). The portal remains active until you deactivate it within RealtiWeb.

The previously agreed to meeting date, meeting time and video conferencing method are listed. If you are using a third-party app for video, you will launch that and call your client at the appointed time.



## Using the LDD Meet™ Video Conference Application

LDD MEET™ VIDEO CONFERENCE

Leave LDD Meet™

Barry Lu



Sally Lu





**Video not working?** Refresh your browser and try again.

**LDD Meet™ Video Conference** is supported in Chrome & Firefox on Windows, Mac & Android devices, and Safari on Mac & iOS devices.

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DOWNLOAD ADOBE SCAN




**LDD Meet** runs directly within the supported browsers mentioned previously.

To start the meeting, all parties will click on the **Join with LDD Meet™** button.

Follow the steps outlined in the Remote Signing Protocol and Video Conference Checklist during the meeting.

 To take a picture of your client holding their ID, you can click on the blue camera icon at any time. This will take a picture and save it to your browser's default downloads folder. The file name will begin with your RealtiWeb file number.

You can also record your session using the instructions on the next page.

After the documents have been signed to your satisfaction, you can direct your client to scan and return them to you in the method of your choosing.

We have included links to the Adobe Scan application on the portal as it produces PDF files from a mobile phone's camera for your client's convenience. This app is free to download for Android and Apple devices. Please review this app to ascertain its suitability for you and your clients.

Once your meeting is finished all parties can click on the **Leave LDD Meet™** button.

### Additional Signing Meetings for this Transaction

This portal will remain active until you **Lock** it in RealtiWeb, or delete the RealtiWeb file. If you need to use it to sign additional documents simply inform your clients to reload the portal.

## Adding Support Staff to your Account

You can add more support staff to your account any time you are in a RealtiWeb file.

1. Open any file and scroll down to the **Firm Contact** area of the RealtiWeb **Basic Information** tab.
2. Click on the ellipsis button [...] beside the field then click on the blue **Add** link at the top of the screen.
3. Fill in **Staff Member Name**, **Phone No.**, and **Contact Method** with the staff person's email address.
4. You can ignore the rest of the fields.
5. Click on **Update List**. To add another, click on **Select Another**. Otherwise, close the pop-up.

**The new staff member is now saved in your account and is available in all your files.**

Staff Information	
Staff Member Name	<input type="text" value="Test User"/>
Initials	<input type="text"/>
UserID	<input type="text" value="TU"/> ...
Position/Job Title	<input type="text" value="Tester"/>
Phone No.	<input type="text"/>
Fax No.	<input type="text"/>
Miscellaneous Contact Information	
Contact Method	<input type="text" value="Email"/> ... <input type="text" value="support@ldd.ca"/>
Contact Method	<input type="text"/> ... <input type="text"/>

## Adding Lawyers to your Account

You need administrative rights to add Lawyers. After you login to LDD from [www.ldb.ca/login](http://www.ldb.ca/login), you will see the **Firm Account Admin** option near the bottom of the product selection screen.

1. Click on **Firm Lawyer/Notary Designation** on the Account Administration screen.
2. Click on **Add Lawyer/Notary** at the top of the lawyer table.
3. Expand the chevron beside **Add a Lawyer without a LAWPRO Password** by clicking on the **+** symbol.
4. Fill in **First Name**, **Last Name** and **Email**.
5. Make sure the communication preference dropdown towards the bottom of the screen is set to **Email**.
6. **Click on the blue piggy bank to save this Lawyer.**

Add a Lawyer using LawPRO Password  
 Add a Lawyer without LawPRO Password

**First Name:**   
**Last Name:**   
**Firm Name:** LDD AND ASSOCIATES  
**Address:** 250 Davisville Avenue, Suite 401  
**City:** Toronto  
**Province:** ON  
**Postal Code:** M4S 1H2  
**Phone:** 416 367-0600  
**Fax:** 416 367-4066  
**Email:**   
**Alternate Initials:**

I prefer to be communicated with by .

## Adding Users with their own Login Credentials

You need administrative rights to add users. After you login to LDD from [www.ldb.ca/login](http://www.ldb.ca/login), you will see the **Firm Account Admin** option near the bottom of the product selection screen.

**Administrative:**

- ▶ [Firm Account Admin](#)
- ▶ [Update Payment Information](#)

1. Click on **System User Management** on the Account Administration screen.
2. Click on **Create New User** at the top of the user table.
3. Fill in **User**, **Password** fields, **First Name** and **Last Name**.
4. **Click on the blue piggy bank to save this user.**

RealtiWeb offers other optional settings if you choose to further refine user access.

**Administrator** checkbox gives this user administrative rights.

**Expiry Date** sets an expiry date for this user's password. This is good for granting access to temporary workers.

**Force Password Change** checkbox makes the user change their password the next time they log in.

**Lock User** checkbox locks the user's account without deleting it. Good for temporary suspension of a user.

**User Rights** provides options that further restrict user access within RealtiWeb.

**User:**   
**Password:**   
**Verify Password:**   
**First Name:**   
**Last Name:**   
**Is Administrator?**   
**Expiry Date:**  ex: 2012-02-23  
**Force Password Change?**   
**Lock User?**   
**Email:**

 **User Rights**

## Frequently Asked Questions

### How do we get started?

Follow the steps in this guide to set up a dummy file to test out the opening process, document uploading, client invitation and video conferencing features. Invite co-workers to the remote signing portal so they can experience it as your clients would.

### Why is LDD offering this application for free? How long will it be free?

We feel that it is vital to support real estate solicitors at this time by offering this tool to legal professionals who feel they could benefit from it. We will continue to offer it for free as circumstances dictate. If anything changes, we'll let you know.

### Is this the final product?

Far from it! We were in the middle of launching our next generation of RealtiWeb with many more advanced time-saving features, but we rushed to release this (very) early version of the Remote Signing Portal to meet an immediate need. Stay tuned for more information.

### Help! I missed some required fields during File Opening!

Don't worry. RealtiWeb will let you know what you've missed. All the required fields can be found on the **Basic Information, Property and Legal Description** and **Contract Details** tabs.

### My client says the portal has been locked. What do I do?

Go to the related file in RealtiWeb, open the Remote Signing window and click on the blue Unlock button. Then save your RealtiWeb file. Ask your client to refresh the web page and try again.

### I made changes in RealtiWeb but they're not being reflected on the signing portal?

Certain changes are only updated on the portal when you Save the RealtiWeb file. If your client is on the portal while you make a change, they will need to refresh their browser.

### What is the Code field for on the Remote Signing Management window?

For added security, you may choose to direct your client to write a special code on the documents they are signing. This optional field is here to help you keep track of this code for your own records.

### How do I get more help?

If the answer can't be found in this guide, go to the Help menu at the top of the screen. Click on User Guides and try there. If you're still stuck, send us an email at [support@ldd.ca](mailto:support@ldd.ca).



## Additional Features for Existing RealtiWeb Users

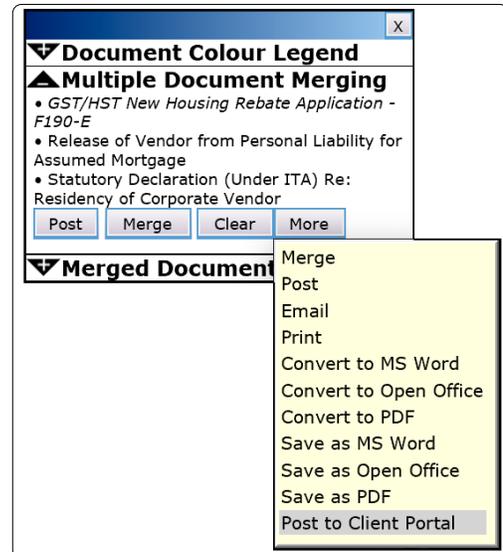
Much of this guide has been written for users who do not currently use RealtiWeb as a conveyancing application in their practice. If you are using RealtiWeb, much of the information prior to the Initiate the Remote Signing Portal step includes things you already do in your daily use of the system. You may want to review the mandatory fields required for the portal to save yourself frustration.

### Uploading RealtiWeb Documents to the Portal

You can upload RealtiWeb documents directly from the Docs screen. Right click on a document, (or package of documents) and select **Post to Client Portal** from the dropdown menu. This will merge the document, convert it to a PDF and upload it to the portal.

To upload multiple documents at once, hold down the **Ctrl** key and **left-click** (with your mouse or trackpad) on the documents to merge. Each document you click on will be added to the **Multiple Document Merging** area of the Docs screen. When you are ready to post all these documents, right-click on the list and select **Post to Client Portal**

**You can also upload PDFs from your computer by using the methods outlined earlier in this guide.**



### Video Checklist Document

There is a new document in the Closing Letters and Documents category called Video Conference Checklist. Merge this document prior to your Remote Signing Meeting to include file information and the list of documents you have uploaded to the portal.

### Changing Your Location on Documents for Signing

If your location is different than your office location, you may need to change the city name. You can do this easily by expanding **Document Control Items** by clicking on the **+** symbol. Change any relevant information then merge your documents.

**Document Control Items:** ▲ Label/Envelope/Fax Open Save Folder

Document Date:

Dated at:   In the:

Signature Date: this  day of  ,