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RealtiWeb® Administrator User Guide

This guide is for **Administrators** of LDD RealtyWeb Accounts.

Other guides available include:

[Basic User Guide](#)

The basic tasks to open and complete a real estate deal

[Advanced User Guide](#)

More advanced features like editing master documents and exporting to e-reg

[Accounting Integration Guides](#)

Setup and manage imports and exports to/from accounting packages, including PCLaw and CosmoLex

[Title and Writ Search Guide](#)

Use Teranet capabilities without leaving your RealtyWeb screens

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Accessing Administrator Functions

Logging in as Administrator

Go to www.ddd.ca and click on **Login**. To log in to **RealtiWeb** with administrator access, login as the Super Admin or with your personal credentials (if set up with administrator access). The Super Admin account is accessed by leaving the username blank.

Accessing Administrator Functions

After logging in, the administrative functions are accessible under **Account Admin**. The list of options are:

- **Firm Information:** Information pertaining to the Super Account can be amended as needed (limited to Super Admin accounts).
- **User Management:** Within this screen add and delete users, and amend user information.
- **Lawyer & Notary Management:** Manage the firm's lawyers and notaries.
- **Advanced Access Management:** This allows you to manage which user accounts are able to create files for your firm's lawyers.
- **View Billing:** This option takes you to view the account statements for the entire firm account.

Firm Information

Here you are able to indicate who is using the Super Admin account, also known as the account administrator, and manage the Super Admin login. As well, set the security settings for your firm, for example password requirements for all user accounts. Click the **Piggy Bank** icon to save changes.

Note: Contact support@ddd.ca to change the **Firm Name** on this screen.

User Management

From this screen you can add and remove user accounts, and edit user account information.

Add Users

To add a new user, click **Add**. A screen will load for the user account details. There are options to set the user account as an administrator, forcing a password change and/or locking the account after a certain date. The ability to limit the person's access in each of your LDD applications is under the **User Rights**.

Finish creating the account by clicking the **Piggy Bank** icon.

Modify Users

Click the pencil icon to the right of the user account you want to modify. Save any changes by clicking the **Piggy Bank** icon.

If someone has forgotten their password, anyone with administrator access is able to reset the password by editing the user account information and changing the password.

Remove Users

If you want to remove a user account, click the trash bin icon to the right of the user account.

Note: Removing (a.k.a. deleting) a user account removes the user account completely from your firm account.

Lawyer & Notary Management

From this screen you can manage your firm's lawyers and notaries.

Add Lawyers and Notaries

To start adding a lawyer or notary, click on **Add**. The screen will load showing two methods of adding a lawyer/notary. The options are:

1. **Add a Lawyer using LawPRO Password**
2. **Add a Lawyer without LawPRO Password**

Click the chevron beside the method you want to add the lawyer/notary. The section will expand to collect the information.

Adding Lawyer/Notary using LawPRO Password

After expanding the section, enter the lawyer's **Law ProID/Assurance LAWPRO NO.** and **Password**.

By default the lawyer name, as it is registered with LawPRO, is used when printing letters and documents in **RealtiWeb**. If an alternate name should be used, enter it in the **Alternate Name** and **Alternate Initials** fields.

Finish adding the lawyer to the account by clicking the **Piggy Bank** icon.

Note: This method of adding a lawyer allows your firm to pick up postings through the LDD Inbox (accessible in **RealtiWeb** and **WebDocumentRetrieval**), and subscription to the OREA Forms (for Ontario real estate).

Adding Lawyer without LawPRO Password

After expanding the section, the fields to add the lawyer will appear. After adding the lawyer/notary's details, finish adding the lawyer to the account by clicking the **Piggy Bank** icon.

Modify Lawyers/Notaries

To update the information, click the pencil icon beside the particular lawyer/notary. Save any changes by clicking the **Piggy Bank** icon.

Remove Lawyers and Notaries

To remove a lawyer/notary, click the **Trash Bin** icon beside the lawyer/notary you want to delete.

Advanced Access Management

Advanced access management allows you to control which users can change the lawyer information.

View Billing

From this screen you can view your firm's transactions and statements for the current year.

Firm Settings

As an administrator it is recommended to configure the Firm Settings within **RealtiWeb**. Setting up the Firm Settings in **RealtiWeb** is to save time when completing files.

To get started, log into www.lawyerdonedeal.com/lddlogin.asp and select the **RealtiWeb** province. In **RealtiWeb** go to **Tools** → **Firm Settings**. Complete the information as it pertains to the law firm.

- **Contact & Firm Address:** This establishes the Firm Name and Title, and the Address of the firm. There is a place for the Firm Owner.
- **Document Options:** This sets the defaults for documents. Any documents that are created within a **RealtiWeb** file will follow the same standard format. This also controls where documents are saved.
- **Statement of Account Defaults:** The fields will automatically come into your Statement of Account. You can always overwrite these settings on a file by file basis (for any exceptions).
- **Trust Statement Defaults:** The fields will automatically come into your Trust Statement. If you have line items you always want included, but the charge changes then leave the dollar amount blank. You can always change the fields in each file (in case there is an exception).
- **Trust Account Information:** Enter this information to save entering it every time.
- **3rd Party Account Information:** Certain credential information can be saved (when available). User specific login credentials can be saved in **User Settings** in the **Tools** menu.

Contact & Firm Address

Basic information pertaining to your firm. Make any changes as needed and save.

Document Options

The document options provide you the flexibility to set a default for how your documents will be merged in **RealtiWeb** and where to save them. These options apply across your entire firm account.

Statement of Account Defaults

Use this section for setting defaults for the **Statement of Account**. The top section is to enable **RealtiWeb**'s Accounting Integration with PCLaw or CosmoLex.

The following sections set defaults for Purchase, Sale and Mortgage file settings. You're able to set everything from the standard fee charged for each file type to regular disbursements. If there's a regular charge or disbursement that changes frequently, add it without an amount.

You can amend the wording that appears on your **Account to Client**, and add standard items to the report (based on file type).

The last two sections allow you to determine what items to include in your billing to the client, and if you want to export to PCLaw or CosmoLex. You are also able to enter the **G/L #** for each line item for your PCLaw export.

To include the item in the **Account to Client**, check off the checkbox under the **Incl** column.

Trust Statement Defaults

Trust Statement information, as it will populate into documents and letters, can be completed in this section. As well as, if your firm is including the **Registration Fees, Title Insurance Fees, and Land Transfer Tax** in the **Trust Statement**.

Trust Account Information

To save you and others at your firm time, you can enter the firm's trust account information. If you have more than one trust account, clicking the checkbox beside **Allow Alternative Trust Accounts** will enable you to enter other trust accounts.

3rd Party Account Information

To save you and others at your firm time, you can enter in any universal credentials. Anything set here will be the 3rd party account information default in **User Settings** (accessible under the **Tools** menu).

Further Help and Support

We want to ensure your complete satisfaction with our products. Should you have any questions or experience any problems or difficulties with using **RealtiWeb**, please do not hesitate to contact our Support team. You can contact us as shown below:

Phone 800-363-2253 ext. 0
 416-367-0600 ext. 0

Email support@ldd.ca