RealtiWeb® Ontario Advanced User Guide

This guide is for the more advanced features like editing master documents and exporting to e-reg.

Other guides available include:

Basic User Guide
The basic tasks to open and complete a real estate deal

Administrator User Guide
For **Administrators** of LDD RealtiWeb Accounts

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 RealtiWeb screens

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File List on Main Screen

From the **Main** page you will see your firm's files. This list can be customized by clicking the cog icon **Edit List**. Any change to the file list display will be reflected for all users.

After clicking the cog icon, a page will load to allow you to set the columns and sort the file list.

Clicking the database button will open a popup with all the fields that can be used as columns. Click on the field you want to display in the file list.

If you want to change the order of the columns, right click on a field, three options will appear:
- **Move Field Up**: This will move the field higher in the list of fields being shown.
- **Move Field Down**: This will move the field lower in the list of fields.
- **Remove Field**: This will remove the field from the list.

The **Sort Order** column sets how to order the list. For example, setting the list to display in order of file number.

Use the **Piggy Bank** to save your changes, and the **Trash Bin** to restore the file list settings.

> **Note:** Changing the list view will change it for all users.

Additional Create a File Methods

The Basic User guide outlined how to create a new file from the main page. There are other methods for creating (or opening) a file, which are: copying from an existing file, or creating a file from a template.

Copy Existing File

Under **File** select the **Copy Existing File** option. This will change the page to showing a list of your files (you are able to switch between **Recent files** and **Activate files**).

Find the file you wish to copy in your list of files and select it. You are able to use the **Filter** across the top to help in your search.

Deselect (or uncheck) the checkboxes you do not want included, and check the information you do want copied into your new file. After you are happy with what is being copied click "**OK**".

> **Note:** You are unable to copy both the **Purchaser** and **Vendor** as Purchasers (or Vendors).

The popup will close after clicking "**OK**" and the page will load the new file. Complete this screen as described in the Basic User guide, clicking the **Continue** button to finish creating the file.

Create a File Template

First you will need to save a file as a template. This can be an existing file or a newly created file for a specific template purpose.

File Template Creation

Open a file you want to save as a template. Click on the chevron beside the **Basic** button and select **Save File As Template** in the dropdown menu.

After selecting **Save File As Template** a popup will appear.

By default, the **Create New Template** will be selected, which will save the template as a new template. Enter a name for the template in the **New Template Name** field. Afterwards, check off the items that you do not want saved as part of the template. Once you're finished click **Save**, and a popup message should appear letting you know the template was saved successfully.

> **Note:** Any **TitlePLUS** details, Registration details and the **File Number** will <u>always be removed</u>.

If you have existing templates and wish to overwrite one, change the radio button selection to **Overwrite Existing Template**. This will change the **New Template Name** to **Select Template To Overwrite**, where you can use the database button to select a template to overwrite.

Create New File From Template

Now that the **File Template** has been created, a new file can be created using the defaults set up in the **File Template**.

Choose the **File Template** you want for the new file and click the **Create** button.

After clicking the **Create** button, you will be taken to the new file screen to complete the file creation. Note any information in the template will already be populated into the applicable fields.

Specific Database Features

Firm Contacts

You have to manage **Firm Contacts** from within a *RealtiWeb* file. Open a file and click the database button, beside the **Firm Contact** field.

Clicking the database button will open a new popup window with the list of all your firm contacts. If you are editing an existing contact, use the **Edit** to open the **Staff Information** and update the information.

If you are adding a new **Firm Contact**, then click on **Add** at the top of the list.

The **Staff Information** screen will load for you to complete. For the **UserID**, click the database button to access the list of users on the firm account. Select the user who corresponds to the staff member being added.

After you have completed the **Staff Information** for the staff member, click **Update List** across the top of the **Staff Information** popup. This will update your **Firm Contact** database to include the staff member for future files.

Law Society Import

To maintain or update your firm's **Other Side's Lawyer** database, you can import directly from the *Law Society of Ontario*. Click the database button beside the **Other Side's Lawyer** field.

A popup window will appear with a few options. Click **Start a New Search…** to open the *Law Society of Ontario*'s **Lawyer and Paralegal Directory**. The page will be ready for you to enter your search criteria and continue.

After the search, select the **Full Name** of the lawyer you are looking for. The **Lawyer Contact Information** will be shown with a green **Add to LDD** button. Click **Add to LDD** to import the information into *RealtiWeb*.

The *Law Society of Ontario* website will close and the selected lawyer's contact details will load in *RealtiWeb*. To continue your lawyer import, click **Select this Lawyer**.

The popup will be replaced with the lawyer's contact information in the format *RealtiWeb* requires. It is recommended you review the imported information and add in any missing details you know. To finish the import, click "**OK**". This will set the **Other Side's Lawyer** in the file to the imported lawyer.

If you want to use the imported lawyer in other files, you can click **Update List** to add the entry to your lawyer database.

> **Note:** Click "**OK**" for any changes to the lawyer entry to be updated in the *RealtiWeb* file. If you click **Update List** (updating in the database), and close the popup the changes will **not** be in your file. For your changes to be reflected in the *RealtiWeb* file, you must click "**OK**" before closing the popup.
>
> In addition, if you close the popup, **Cancel**, or **Select Another** your changes will be lost.

Real Estate Agent and Broker Search

To locate brokerages and real estate agents for maintaining your firm's **Real Estate Broker** database, click on the database button beside the **Real Estate Broker** field on the **Contract Details** tab.

A popup window will open for search criteria to be entered. After clicking **Submit** the search results will load. Click on the real estate agent or broker to add it to your firm's database.

To maintain your database of brokerages and agents switch to the **All Real Estate Agents** tab. From here you can use the **Delete** and **Edit** beside each real estate broker. The **Delete** will remove the entry from your database, and cannot be restored. The **edit** button will open the entry for it to be updated.

Calendar Feature

At the bottom of the main page, you will see the **Calendar**. It will show you closing, requisition and contract dates of your deals. You can open any of the exhibited deals by clicking them. The **Calendar** feature is accessible from within a file, by clicking the **Calendar** (in the upper right corner).

Calendar Views

By default, the **Calendar** will show you the weekly schedule of your deals. You are able to switch between daily, weekly and monthly views by clicking on the **Daily**, **Monthly**, and **Weekly** buttons. The current view is identified with a red circle.

You can switch the date range (within the view) by clicking the arrows beside the date range. This will let you see the previous or following day, week, or month (depending on the selected view).

The **Clock** (in the lower right corner of the **Calendar**) enables you to add appointments to the **Calendar**.

Clicking the **Clock** will open a new window that will let you select the appointment type, details of the appointment, date and time, whether or not the appointment is private, and the file to which to link the appointment.

> **Note:** Checking the appointment as **Private** will limit who has access to editing and seeing the appointment.

Calendar Settings

You can add reminders to your calendar to remind you of important events that are going to take place on any of your files. The system sets up the following standard dates for you automatically (all default system preferences can be modified):

- Closing Date
- Tickler for Closing Date
- Requisition Date

- Tickler for TitlePLUS Pre-approval
- Tickler for Undertaking Complied With
- Tickler for Mortgage Discharge Complied With

You have the option to add the following dates, or any other dates you wish to set up:

- Title Search Ordered
- Title Search Completed
- Municipal Searches Completed
- Fire Insurance Information Confirmation Completed
- Report to Client Completed

- Report to Lender Completed
- Appointment with Client to Sign Documents for Closing
- Mortgage Advance Requested
- Mortgage Advance Required

> **Note:** Any changes made will only display on newly created files, or existing files AFTER entering the file and saving, this updates the calendar with the new settings for that particular file.

Using the **Calendar Preferences** feature, you can set up your **Calendar** to select which dates you would like to view and when you would like to view them. From the main page, select **Tools** → **Calendar Preferences**.

Use **Calendar Preferences** to set how you want to see the files listed, and which items you want to see displayed on the **Calendar**.

Use the radio buttons underneath **Show files on Calendar by** to switch between showing files by client name or file #. For selecting which items you want to see, click the checkbox beside the particular item (under **Description**).

For each item, you are able to select when to display it on the **Calendar**. Under **Display** there is a text field for the number of days (ie. 2 or 4), and a dropdown menu to select if the alert should appear **before** or **after**. The **Date** dropdown allows you to select which date you want to count from/to.

> **Note:** If you leave the number of days blank, the system will interpret it as zero.

If you want to show the event on everyone's calendar, leave the **Display On Clerk Calendar** unchecked and **Display on Another Person's Calendar** blank.

Alternatively, checking the **Display on Clerk Calendar** will show the event on the **Firm Contact** calendar. In addition, selecting a person from the user list (open using the database button) will show the event on the selected person's calendar. After selecting a user from the list, their name will appear.

> **Note:** If you are not using a **LDD Account**, then do not use the Clerk or Another Person's calendar indicators. If you wish to use these indicators, please contact our support team at support@ldd.ca or 1-800-363-2253.

Management Reports

All reports created in *RealtiWeb* will use information pertaining to your firm and files.

Producing Management Reports

To produce a report, go to **File** → **Reports**.

You can select a **Standard Report** (a report listed in black font and is provided by LawyerDoneDeal Corp.) or a **Customized Report** (a report that has been modified or created by you or someone else at your firm).

If you select a **Standard Report**, the fields used in the selected report will display on the left side of the screen underneath **Report Settings**. To the right of each field is the criteria for each field.

The fields are automatically checked off to show in the report. Uncheck the checkboxes under **Show** for any fields you do not want visible in the report.

> **Note:** Each **Field** will be a column in your generated report.

Click **GO** to generate the report. If you checked off **Show Sequence?** then the first column in the report will show the line item number.

Use the **Printable Version** to print the report (the button will open the report in a new browser tab for printing). If you want to change the report, click **Customize the selected report** button to return to the previous screen.

Customizing Management Reports

After selecting a report (or clicking the **Create** button under the list of reports and naming your new report), you are able to customize the report.

If you want to add more fields, click the database button beside the empty field on the left. This will open a popup with all the possible fields you can add to your report. Alternatively, you can use the database button beside an existing field to change it.

If you want to only include certain files based on one of your fields, you can use the **Criteria dropdown** to select a condition. After selecting a condition, you will see new fields to the right of the **Criteria**. These fields are used by the system to determine what should be brought into the report.

In case you want the report to be in a specific order, you can change the order in three ways.
1. Click the heading of the column you want to sort by.
2. Type in an order in the **Sort Order** column (beside the **Show checkboxes**).
3. Right-clicking the **Field** and selecting **Move Column Up** or **Move Column Down** (note that only applicable options are in black font and are clickable).

After you have finished modifying the report, click **Save** (at the top of the page) to save your changes.

If you want this to be a new report click **Create**. This will open a text field underneath the **Create** button for the new report's name/title. Click "**OK**", after you have entered a report name. The report will be available the next time you login.

> **Note:** You cannot save changes to a **Standard Report**. To keep your changes, click **Create**, enter a report name, and click "**OK**". The report with your changes will now be saved.
>
> Alternatively, you can click **Duplicate** and then **Save**.

User Defined Fields

User Defined Fields are fields you can add to *RealtiWeb* for your firm. These fields are treated like any other field in *RealtiWeb* and are highly customizable. They can be used to combine other fields together, calculations or adding additional information to your *RealtiWeb* files.

User Defined Fields are found under **Tools → User Defined Fields**.

Creating User Defined Fields

Follow these steps to add a custom field:

1. Click **Add User Field** to add an empty line to the bottom of the list for your custom field.

2. Add the name of your new field under **Caption**. This should be something easy to understand across your firm.

3. Next select the **Data Type** and **Size** (if applicable) for the new field. The **Size** of the field is the number of characters allowed to be entered into the field.

   Note: If a user enters a value that exceeds the character limit, they will receive an error message.

4. Set the **Location** (a.k.a. page or screen) for the field to appear. The field will appear at the bottom of the section selected.

5. Click the **Piggy Bank** icon to save your changes.

Optional - Edit User Defined Fields

After setting the **Caption**, **Data Type**, **Size** (if applicable) and **Location** for the custom field, an **edit** button will be between the **Size** and **Location** columns. (If you want an empty field, do not **Edit** the custom field.)

Clicking the **edit** button will open the **Field Formula** popup window. Here you are able to set formulas for the custom field. If you have basic programming knowledge, you will find that adding a formula to the custom field is easier than someone without this knowledge.

Using the *Add…* button

The **Add…** button has three options to select from: **operators/functions**, **conditions**, and **other**.

The **operators/functions** option is for help with building formulas, especially when setting a date type field or rounding a variable. The **conditions** are predetermined formulas, while the **other** option adds a blank field.

Using the *Add Field* button

One main reason for creating a **User Defined Field** is to create a new field with a formula. The **Add Field** button is perfect to use for simplistic formulas.

For example, if a firm only accepts 10% of the purchase price as a first deposit, they can create a **First deposit**. The firm could use the following steps to calculate 10% of the purchase price:

1. Click the **edit** button.
2. Click **Add Field**.
3. Find and click on the **Purchase Price** field.
4. Type in "*** .01**". The formula will appear.
5. Click **Close**. (Do not click the "**X**" of the popup - this will result in you losing all your changes.)

Master Documents

You are able to edit existing or create your own documents in *RealtiWeb*. Editing master documents includes adding your custom fields into your documents.

After logging into *RealtiWeb*, hover over the **Tools** in the navigation across the top and select **Documents**.

This will load the **Master Documents** area. Here you are able to manage all your *RealtiWeb* documents.

Creating your own documents in *RealtiWeb*

To create your own document, click the **Add a new document...** link in the upper right corner.

The **Add a new document wizard** will open. This wizard allows you to easily define the attributes of your new document by walking you through a 5 step process.

Add a new document wizard

Step 1: Enter the name of your document, then click **Next>**.

Step 2: If applicable, select a **Document Category**. When you are finished, click **Next>**.

Step 3: Check off all the file types your new document will be relevant to.

Step 4: Use the dropdown menu to select a **Document Template** that matches the formatting requirements of your new document.

Step 5: Indicate whether or not your document needs to be looped. This determines how many different drafts of your document you get at one time.

If you require looping, select the **Need to loop based on** radio button and use the dropdown menu to select a field to loop on. For example, if there are two mortgages in your file, and your document is mortgage form, then you would set the **Loop Status** to loop by **New Mortgages (all)** or a specific type of mortgage to loop on.

When you are finished with the wizard, click **Finish** to begin writing your new document.

After completing the **Add a new document wizard**, you will be sent to the **Document Editing page**. This page is divided into two sections: **Document Setup** and **Document Body**.

Document Setup

The **Document Setup** will have your settings from the **Add a new document wizard**. Use the **Edit Attributes** to change any of your selections, except **Document Template**.

> **Note:** To change the **Document Template** click the blue pencil beside the database button. This will allow you to then click the database button to open the list of document templates. Select the new

> template you want to use.

Click on the blue **Click to Edit Margins, Font etc.** link to change the margins, size and fonts of the document. The blue link will open the **Document Format Specific Details** popup with all the document settings.

The last part of the **Document Setup** section tells you what the **Format**, **Title**, **Header** and **Declaration Line** of your new document are. By default these are the same as your selected template, and the default of the template is on the right. You may change these settings on the left.

Document Body

The **Document Body** is where you add your document clauses.

The first part of the **Document Body** is a text field for your clauses. To begin, click the **light bulb icon** to add a new clause to your document.

A **clause editor** will open in the empty text area (underneath the **light bulb icon**). This **clause editor** will allow you to easily format text, create tables and columns, and insert fields.

You can select the following functions from the **clause editor** toolbar:

- Cut
- Copy
- Paste without Format
- Paste with Format
- Underline
- Undo
- Bold

- Italic
- Underline
- Strike Through
- Subscript
- Superscript
- Alignment
- Justification

If you want to add a field into the clause text, click the **F** icon (between the checkbox and table properties icons). This will open the **List of All Fields** (including your custom fields), find and click the field you want to add into the clause.

To close the **clause editor**, click outside it.

If you want to add more than one clause, click the **light bulb** icon again to add another clause.

Each clause has its own attributes, allowing you to include it according to logical circumstances. Once you write a clause you can save it to a library for use in other documents. Right-click anywhere on the clause to change its properties.

The last option, **Properties/Conditions**, will open the Clause Properties popup.

The Clause Properties popup enables you to name your clause (**Clause Name**), select **Group Headings**, when to apply the clause (the checkboxes for **Purchase**, **Sale** and **Mortgage** transactions), type the **Conditions** (while using the **Add…**, **Add Field**, **Clear**, **Copy**, **Paste** and **Check** buttons), and when the clause should loop (if applicable).

The **Add…** button will open a small window with 3 tabs: **Operators**, **Conditions**, and **Counts**.

The **Operators** lets you determine the logic along with the **Add Field** button (on the main popup) to write your own condition for the clause.

The **Conditions** option is programmed with default conditions and does not require **Operators** (unless you are writing multiple conditions for the clause).

The **Counts** option enables you to condition the clause by how many items are in the file. This is useful for when you want to write a clause based on when there is 1 transferee and another clause for when there are multiple transferees on a file.

For example, if you want a conditional clause for when there is only 1 transferee then you can follow these steps:
1. Click **Counts**. This will show a list of available variables the system is able to count.

2. Scroll down and click the variable **Transferees**.

    This represents that the system will count the number of transferees on the *RealtiWeb* file, as it merges the document.

3. Next you should select a 'comparison operator'.

4. In the grey text field, enter **1**.

5. The condition itself tells the system to: *Include this clause in the document when the **Count of Transferees** is equal to **1***.

> **Note:** If you wish to use text in the grey field (instead of a number), please place the text within apostrophes (').

The **Add Field** button (on the **Properties/Conditions**) will open a new popup, with a list of all the fields you are able to include in your clause. The other buttons, **Clear**, **Copy** and **Paste**, are consistent with the rest of *RealtiWeb*.

The **Check** button is to see if your condition is 'readable' to the system. After you have written your condition, click **Check**. If the system is able to understand your condition then the outline will change from black to green. If the system can not understand the condition, then the outline will change to red and a popup message will appear with the issue.

Beneath your text field for adding clauses, you will see the dropdown menus for **Signature**, **Electronic Signature**, **Declaration** and **Commissioner**, and checkbox for **Exclude Brackets** to set the default settings for the document.

After you have completed all your changes, click **Save** at the top of the page to save your new document. The document will now be available to others in your firm from the **Docs** screen (when within a file).

If you right click a clause and reenter the **Properties/Condition** option, you will see a few more settings. These settings let you to set spacing and page breaks for when the document is merged. This helps with formatting your document to ensure headings are always at the top of a page, etc.

If you want to create a copy of your document (or one of the standard *RealtiWeb* documents), click **Duplicate**. This will create a copy of the opened document.

The **Remove Document** button (beside **Duplicate**) will delete your created document from *RealtiWeb*.

Modifying Existing Documents

You are able to modify your custom documents and the standard *RealtiWeb* documents. Go to the **Master Documents** area to find and select the document you want to modify.

For example, if you select **Acknowledgment of Conflict - Purchaser** the **Document Editing** page will open. Here you are able to edit the document (similar to when you created a new document, but all the fields will have existing data).

After your edits, you can click **Save** or **Duplicate**. The **Save** button will save the document, while the **Duplicate** button will copy your changes and then you can **Save**.

If you save a **Standard *RealtiWeb* Document**, then a new button **Restore LDD Document** will appear beside **Duplicate**. The **Restore LDD Document** button will revert your document back to the **Standard *RealtiWeb* Document**.

> **Note:** You will lose all your changes, if you click **Restore LDD Document**.

Organizing your Master Documents into Packages

RealtiWeb enables you to create your own document packages. To work with your packages, select the transaction type you want to work with by changing the **Show documents apply to:** dropdown.

For the purposes of this guide **Purchase** will be used. This will filter the documents to only show documents applicable to Purchase files, and the radio button **Package** will appear.

Clicking the plus icon beside a package name, expands the package to show all the documents inside.

There will be a **Document Package Configuration** option above the list of document packages. The **Add** enables you to create your own package for the transaction type. Meanwhile, **Save** will save the configuration. The **LDD Once** and **LDD Always** will revert your packages back to their original states.

Creating a New Package

Clicking **Add** will create a package at the end of the list of packages. The new package will be highlighted in blue, indicating you are editing the name. Start typing the name of your package, and click elsewhere on the page when you are finished typing the name.

Right-click your package name. You will then see several options, select **Add a Document from List**. (The other options are covered in the subsequent two sections.)

After clicking the **Add a Document from List** option, the list of your documents (for the specified transaction type) will appear. Click the document you wish to add into your package.

> **Note:** You are only able to add one document at a time to your package.

If you click the plus icon it will expand the package to show all documents in the package.

Organizing your Documents within a Package

After clicking the plus icon to view the documents inside the package, you are able to access document specific options. Right-click on a document name to open the document specific options. Note the document-specific options have changed from grey to black.

Move Document Up	This will bring the document higher up the list.
Move Document Down	This will lower the document in the list.
Remove from this Package	Clicking this will remove the document from the package.
Set Document Condition	This will open a popup, where you can set the condition of when to include the document in the package. This works the same as setting conditions on clauses within a document (refer to page 35 for help with writing conditions).
Switch Page Number Reset	Clicking this will switch **rsm pg#** from **(no)** to **(yes)**, and vice versa. To view the document conditions, refer to page 42.

Organizing your Packages

If you right-click on a package name, you will see a list of options. Underneath **Add a Document from List**, is the available options for rearranging your packages.

Move Package Up	This will bring the package higher in the list.
Move Package Down	This will lower the package in the list.
Rename this Package	Clicking this will highlight the package name in blue, and you will be able to rename the package.
Copy this Package	This will duplicate the package and name the copy with **Copy of** before the name of the original document.
Delete this Package	Clicking this will delete the package from your list. Deleting a package cannot be undone.
Show/Hide Doc Conditions	This will show all the conditions and whether or not the page numbers are reset for each document within a package. (If you are already seeing the conditions, this option will hide them.)

Advanced Document Merging Options

After you have selected a document to open (on the **Docs** button screen), the document will merge. This means that the relevant information in your **RealtiWeb** file has been put into the document.

Across the top of the merged document, you will see **Save**, **Save As**, **Print**, **Print Preview**, **Share**, **PDF**, **MS Word**, and **OpenOffice**. In this guide we are focusing on the **Share**, **PDF**, **MS Word**, and **OpenOffice** options. If you want to learn about the other options, please refer to the Basic User guide.

Share

The **Share** option enables you to email the document to another law firm (or someone inside your firm), or to post the document to **LDD WebDocumentRetrieval®** to a lawyer.

Email Docs

If you click on **Share** or hover over the word and select **Email docs** (from the dropdown menu), you will begin emailing the merged document(s).

Setting up Document Emailing

Before you can start emailing documents, you will have to verify your email. If you click **Email docs**, a popup will appear explaining to verify your email address. In the popup, click the word **VERIFY** to begin verifying your email.

A popup will appear, letting you know that the verification email was sent. Simply, click "**OK**" and check your email.

In the email, click the blue verification link. In a new browser tab, you will see confirmation that the email has been verified. Return to **RealtiWeb** (in **Internet Explorer**), and re-select your document(s) you want to email.

Emailing Documents Process

After clicking the **Email Docs** option (or **Share**), a popup will appear. Enter the email addresses you are sending the document(s) to. Separate each email address using '**;**'. Please be advised that the email limit is 5 recipients in each of the three options (**To:**, **CC:**, and **BCC:**).

> **Note:** If you want a copy of your email, we recommend adding your email address in the **BCC:** field. This will secretly send the email to you, without the other recipients knowing.

You may change the **Subject:** field text to change the subject line of the email. The document(s) you are attaching have two options: attaching as a PDF or inserting into the email body. The dropdown defaults to **Attach PDF**, but you may change it to **Don't Attach**. If you do not attach the document(s) as a PDF, then click **Document into Email Body** (or if you want the document as a PDF and in the email body). This will load the entire document into the email body.

Beneath the options for attaching/inserting the document(s) are the buttons for editing the body of your email, and the email body.

> **Note: There is no guarantee that you will receive a Read Receipt response back.** Certain email providers, such as GMAIL do not recognize this feature, and some recipients may have their settings set up to not send a Read Receipt email for privacy.

After you are finished writing your email, click **Send** at the top of the popup to send your email. The popup will close and a new **Email Sent Successfully** popup will appear. Click "**OK**" to the **Email Sent Successfully** popup.

> **Note:** The **Discard** button will delete your email draft.

Posting Documents

You are able to post documents regardless of having an **Other Side's Lawyer** listed in the file.

If you do not have an **Other Side's Lawyer** listed in the file, then you will see the **LDD Firm Search**. Simply, enter the **Firm Name**, **City** or **Postal Code** of the law firm you want to post the documents to, and click **Search**.

The search results will load, showing the Firm Name, Street Address, City, Postal Code, and Phone Number of the law firm. Select the firm you are trying to post the document(s) to.

> **Note:** If you have an **Other Side's Lawyer** listed in the file, then the system will automatically match the other side's lawyer with an **LDD User Firm**. If the system is unable to properly match an **LDD User Firm** with the **Other Side's Lawyer**, then it will enter the **Firm Name**, **City** and **Postal Code** from the file into the search and load the search results. You will then have to manually select the firm.

> **Note:** If you are unable to find a matching firm then use the **Create** button at the bottom of the popup. This will let you post the document(s) and email instructions to them through **LDD's Email Service**. It is recommended to copy the instructions and email them to the other side's lawyer from your own email, to ensure they receive the instructions.

The **Other Side's Lawyer** field will auto-complete with what is in the *RealtiWeb* file. If this field is blank, complete the **Other Side's Lawyer** field on the **Basic** screen. The **Match LDD User Firm** will be filled in with what the system has identified or what you selected from the search results. If you want to change either the **Firm Contact** use the database button (to select another firm contact) or the **edit** button. To change the **Match LDD User Firm**, use the database button.

You will be able to add a **Posting Note** (up to 128 characters), and check off the information you wish to send. The last checkbox, you may check off to send an email to the **Other Side's Lawyer** for them to know the document(s) were posted for them.

Click **Post** to finish your posting.

PDF

There are three options under **PDF**, these are: **Open Acrobat**, **Download**, and **Save to Hard Drive**.

After clicking **Download**, you will see a popup across the bottom of your screen. You may Open the file in Acrobat, Save (which will default to where you save your downloads), or Save As (which will let you select where to save the file). All saved versions will be in PDF format.

MS Word

There are two options underneath **MS Word**, these are: **Open in MS Word** and **Save to Hard Drive**. **Open in MS Word** will open the document in Microsoft Word. The **Save to Hard Drive** will save the document as a **Word doc** on your computer.

Advanced Label/Envelope/Fax Functions

Adding and Editing Your Contacts

The **Label/Envelope/Fax** is a contact manager that will collect all your contact information on a file in one place and enable you to create labels, envelopes and fax cover sheets for any of the contacts on the *RealtiWeb* file. Any changes to contact information will change the information in your file.

Access the **Label/Envelope/Fax** after clicking the **Docs** button.

The checkbox beside each contact name allows you to select the contact you want to use when creating your **Label**, **Envelope**, or **Fax Cover**.

To see or edit any of the contact information, click the plus icon to expand the contact.

If you want to add more contacts (who are not included by default), you can add them under **Extra Contacts**. Simply, enter the name (First name(s) followed by Last name) into the **Extra Contacts** text field. When you either hit the **Enter key** (on your keyboard) or click outside the field, the additional fields will appear, followed by a new **Extra Contact** text field (in case you want to add more than 1 extra contact).

The last part of the popup window is the **Municipal Offices/Utilities**. You can use the database button beside the field to select any of the searches you have chosen for the file's municipality. These include:

- Assessment Office
- Airport Zoning
- Bank Act
- Bankruptcy
- Building/Zoning
- Bulk Sales Act
- Canada Shipping Act
- Cemetery
- Certificate of Compliance
- Engineering and Water Mains
- Environmental Protection
- Farm Tax Reduction
- Fire Dept
- Fuel Safety
- Gas
- Hanover, Tax/Building/Zoning/Water
- Health Dept
- Registered Agreement Compliance
- Residential Tenancy Ministry
- Residential Tenancy Municipal
- Restricted Area Building Permit
- Septic Tank

- Certificate of Compliance - Expedited
- Certificate of Status
- Conservation Authority
- Corp Status Federal
- Corp Status Provincial
- Corporate File Search
- Corporate Name Search
- Corporation Profile Report
- Corporations Information Act
- Copyrights
- Crown Patent
- Electrical Work Orders
- Elevator

- Heritage Act
- Highway Entrance
- Hydro/Public Utilities
- Land Registry Office
- Local Improvements
- Local Roads
- Local Unregistered Easements
- Mining Act
- Navigable Waters
- Ontario Hydro Electrical Inspection
- Partnership Name Search
- Personal Property Security Act
- Provincial Land Tax

- Shoreline Property
- Subdivision/Development Agreement
- Tarion
- Tax Certificate
- Tax Search
- Tile Drainage
- Trade Marks
- Unregistered Hydro Easements
- Water
- Well Driller Certificate

Label Setup and Printing

To set the quantity of labels you want, complete the **Start Label #** field.

For example, if you enter 2 into the **Start Label #** field then the first label will be printed in the upper right corner.

> **Note:** By default the **Start Label #** will start at 1, which means that the labels will start printing in the upper left corner.

You are able to change how the labels are printed by changing the settings. You are able to open the label settings by clicking **Setup**.

In the **Setup** popup, enter your label specifications (including paper size). Click **Save** when you are satisfied with your changes.

> **Note:** That if you change any of the specifications for the **Label**, click **Refresh** above the **Label Sheet View** to update how the labels will be printed.

You are also able to change the text of your label from the standard text from this popup. Simply change the radio button under **Label Advanced Settings** to **Customize the label text**. A text field will appear with editing options.

> **Note:** It is recommended you click **[ADDRESS]** to insert where the address for each contact will appear. Without this identifier none of your labels will print the contacts' address.

Once you are happy with your changes click the **Save** button.

After saving, close the **Setup popup** to return to the **Label/Envelope/Fax** popup. If you click the **Labels** button, you will see your labels open in a new window for you to print.

Envelope Setup and Printing

Setting up and printing envelopes are similar to labels. Click **Setup** from the **Label/Envelope/Fax** popup. At the end of the **Setup popup**, you will see the **Envelope Setup** (after the **Label Sheet Setup**).

> **Note:** If you click **Refresh** above the **Envelope View**, you will be able to see your changes.

After you have completed your changes, click **Save**.

When you click the **Envelopes** button (on the main **Label/Envelope/Fax** popup), your envelopes will open in a new window for you to review and print them.

Other Label/Envelope/Fax Functions

From the **Label/Envelope/Fax** popup, you are able to open your **Fax Covers** and **Blank Letters** for printing. Simply click on the corresponding button.

> **Note:** You are able to edit your Fax Covers and Blank Letters from the **Document Control** and selecting **Fax Cover Sheet Blank** or **Letter - Blank**, respectfully.

Additional Mortgage Button Features

Versions of Schedules

RealtiWeb has Bank-issued schedules, which can be completed within the system. These schedules can be exported into Teraview from within *RealtiWeb*, or converted into a PDF file for e-reg.

Converting Schedule into a PDF file (E-Reg PDF)

Assuming there is at least one schedule on the *RealtiWeb* file, you will be able to convert your Schedule(s) into PDF format. If you need help on adding a Schedule to the *RealtiWeb* file, refer to the Basic User guide.

Click on **Additional Terms** or **Click here to go to Lender Schedules**. This will open the popup showing you all the schedules on your file.

You will see the **e-reg PDF** button, beside the Schedule. Click the button to open the Schedule in **Adobe**. You may save or print the PDF file. The system will assume you are sending the PDF separately to Teraview, and will check off the **Exclude from Export to e-reg?** checkbox. This means if you decide to export information to e-reg, the mortgage schedule will be excluded (unless you manually uncheck the checkbox).

Downloading from third party

If your mortgage instructions are in a third party portal, they can be copied from the portal and brought into *RealtiWeb*. To add the mortgage instructions into your file, click on the chevron on the **Basic** button and click **Import from third party**.

A popup will appear. Select where you are importing from in the dropdown menu. After your selection, please follow the instructions in the popup.

OREA Forms

Accessing and Using OREA Standard Forms in *RealtiWeb*

LawyerDoneDeal has over 75 of the **Ontario Real Estate Association (OREA) Standard Forms** in English - online and ready for you, when you need. Just like other *RealtiWeb* documents, you complete the required information in your *RealtiWeb* file, select the appropriate forms, schedules with clauses, and then *RealtiWeb* automatically generates the forms with the required information in the proper areas. Afterwards, you can merge and print a PDF version of the OREA form(s).

> **Note:** Since the forms are now part of *RealtiWeb*, we recommend that you save the data in our database instead of saving the completed Acrobat PDF forms to your desktop. Remember, you can always change the data in the database and then remerge the form again, as many times as you like.

If you have subscribed to OREA through LawyerDoneDeal, then when you click on the **OREA Forms** button at the top of the **Docs** screen you will open a popup. This popup will allow you to create the OREA forms you need.

The OREA forms will pre-populate with information you have entered into your file and you may add other clauses, etc., to your agreement from the OREA form area. These documents are trademarked by the Ontario Real Estate Board and are available to LDD users for the yearly license fee charged by OREA.

If you click on the **OREA Forms** button and receive a popup message, clicking "**OK**" will send you to a new page where you can subscribe to the OREA Standard Forms through LawyerDoneDeal.

After clicking "**OK**" to the popup, you will be brought to the next screen. Click the **Purchase** button to start the buying process of the OREA Standard Forms subscription through LawyerDoneDeal.

Accessing OREA Standard Forms

From the Files section of the *RealtiWeb* main menu, select the client file for which you want to create **OREA forms**. The selected file will open.

Click the **Docs** button to open the **Documents** area. Then click the **OREA Forms** button.

To use the OREA Standard Forms

Use the **OREA Standard Forms** popup to complete any additional required information, select the appropriate forms, schedules and clauses, and then *RealtiWeb* automatically fills in the OREA forms you require.

> **Note:** In this instruction set, an Agreement of Purchase and Sale is used as an example, so you can learn about the process of completing **OREA Standard Forms**.

On the **OREA Standard Forms** popup, select the **APS Details** tab (by default this tab opens). Complete all the fields.

> **Tip:** Remember, the information in these fields populates the Agreement of Purchase and Sale; ensure you complete the appropriate fields.

Click the **Property Details** tab, and then complete the appropriate fields.

> **Note:** The **Property Type** is required. Ensure you complete the **Property Details** on this popup, and then complete the **Legal Description** on the **Property** tab (under the **Basics** button).

Click the **Miscellaneous** tab, and then click the checkbox of the form(s) required, such as the **Remove Conditions (Form 121)**.

> **Tip:** After you click the checkbox of the form you want, the system displays other fields that are specific to this form. Ensure you complete them. You can select all the other forms you require using the **Miscellaneous** tab.

Adding a Schedule

To add a schedule, such as the **Schedule 100**, on the **OREA Standard Forms** popup, click the **Schedules** button.

On the **Schedules** screen, to add a Schedule, click on the database button beside the **Schedule #** field. A new popup will appear with a list of schedule numbers. Select the appropriate number, such as **112**.

To add a new clause to the Schedule, click the **Add New Clause** button, click the category and then select the clause you require.

> **Tip:** Use your mouse to highlight the clause you want and then click it. You can add as many clauses as you need, one clause at a time.

To add other Schedules, click the **Schedule** tab, which will show a blank Schedule. Simply, click the database button beside the empty **Schedule #** field and complete the other fields as necessary. *This works similarly to adding additional mortgages on the **Mortgage** button.*

To create the Schedule(s), click **Click to Create All Schedules**.

To create an OREA form

To create an **OREA form** (such as an APS), on the **OREA Standard Forms** popup, click the **Forms** button. An OREA forms window will open.

On the **OREA Standard Forms** popup, click the form you require, such as **Notice of Fulfillment of Conditions**. The system creates the form in a Portable Document Format (PDF) file. Use the options across the top of the PDF window to print the form.

About Rental Agreements

You can create OREA Rental agreement forms for residential and commercial leases. Use the **Rental Agreement** tab, and then click the button that applies to the type of agreement you require.

To create a Rental Agreement

The process you use to create a residential and commercial agreement is very similar. In the following example, you will create a commercial tenancy lease agreement.

> **Note:** If you have already created a tenancy in the **Issues** button and completed any of the fields in the **New Tenancy** popup, when you click the rental agreement form displays automatically with your completed information.

On the **OREA Standard Forms** popup, click the **Rental Agreements** button. The screen will show two buttons (**Create New Residential Tenancy** and **Create New Commercial Tenancy**). The first is for a residential tenancy, while the latter is for commercial tenancies. If a tenancy is being completed as part of the transaction, you enter the tenancy information into the **Master Issues List** tab (under **Issues** button) plus the further information requested here and can produce a lease in the document section of the OREA forms.

Click **Create New Commercial Tenancy** to begin creating a commercial tenancy. The applicable fields will appear for adding a commercial tenancy. Complete the required fields.

> **Tip:** The system defaults to the short form for commercial agreements. To use the long commercial form, on the commercial tenancy form popup, click the **Longform (Form 510)?** checkbox.

If you require more than 1 tenancy, click on **Create New Residential Tenancy** or **Create New Commercial Tenancy** (depending on which type is appropriate). This will add an additional tab underneath the two buttons. You are able to switch between the two (or more) tenancies, by clicking the appropriate tab. This is similar to when there is more than 1 mortgage on a file.

To create the commercial agreement on the **OREA Standard Forms** popup, click on **Forms**, and then select **Agreement to Lease (Commercial)**. The system will create and open the form as a PDF file.

Account Security / Change Password

To change your password, follow these steps:

1. Login to your account.
2. Click the **Change Password** link in the **Administrative** section.
3. A new browser tab will open with the fields to change your account password.
4. After entering your current password and desired password, click **Update**.

> **Note:** Passwords can only contain letters and numbers.

Billing

Information pertaining to the firm's billing with LDD can be found under **Billing**.

If you select **Billing → LDD Billing Statements**, the page will load with the list of billing statements. This page loads all the transactions within the current year, including the current month.

> **Note:** Save PDF versions of the billed statements for your firm's records.

You can view upcoming transactions, by selecting **Billing → Upcoming Payments**.

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