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RealtiWeb® Ontario Basic User Guide

This guide is for the basic tasks to open and complete a real estate deal.

Other guides available include:

[Advanced User Guide](#)

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

[Administrator User Guide](#)

For **Administrators** of LDD RealtyWeb 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 RealtyWeb screens

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Main Screen

After logging in and selecting Ontario, you will be brought to the **Main** page of **RealtiWeb**. This is where you will manage your files and see what is coming up.

File List

The **Main** page will show your file list. The **Recent files** will show the last 20 files you have viewed on your computer. However, you can select **Active files** or **Archived files** across the bottom of the **Files** portion of the screen to view all active or archived files, respectfully.

The **Filter** on the **Files** portion allows you to specifically search for a file, either by **File No.**, **Client name**, **Reference Line**, **Closing Date**, etc. To sort your files differently for the session only, click on the column headings (such as **File No.** or **PSM**).

Note: **PSM** is an acronym in **RealtiWeb**, that is used for identifying the file type.

P: Purchase file

S: Sale file

M: Mortgage file

Later in the **Docs Button** and **Master Documents Settings** you will see P, S, M, PS, PM, SM, PSM. In this context, the syntax is identifying the file types applicable to each document.

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.

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

Calendar

The **Calendar** feature reminds you of important dates in the current week, day or month. Your account administrator is able to setup what is shown here and if any reminders are sent out. More about this feature will be covered in the **Issues** button.

Inbox

The **Inbox** is how LawyerDoneDeal sends documents between LawyerDoneDeal users. If you are using **LDD WebDocumentRetrieval**[®] your files will appear here.

Control Panel

These controls allow you to create or find a file. **Find a File** will open a popup with fields you can fill out to search for your file.

How to Create a File

There are 3 ways to create a file:

- **File** → **Create New File** (or you can click **Create a New File** in the **Controls** area)
- **File** → **Create New File From Template**
- **File** → **Copy Existing File**

For this training session, we will focus on creating a purchase file from **Create New File**.

File Creation Screen

After clicking **Create a New File** in the **Controls** panel, you will see a blank file.

It is recommended to complete all known fields, especially the following fields:

- **Responsible Lawyer**
- **Firm Contact**
- Title insurer using for the transaction
- Whether this is a new home being purchased from a builder
- **Purchasers**
- **Vendors**
- **Property Type**
- **Property Address**
- **Closing Date**
- **Contract Date**
- **Interim Closing Date** (if applicable)
- **Requisition Date**
- **Contract Price**
- **Deposits**

Note: Screen content will vary depending on **Deal Type** and if it is a **Condominium** or **Freehold**.

To finish creating your file, you must enter a **File #** and **Deal Type** for the **Continue** button to appear.

If you indicate **TitlePLUS** is being used for the deal, a series of questions will appear above the **CONTRACT DETAILS** section.

After entering information on this screen, click the **Continue** button. A new screen will appear with 6 buttons located at the top of the screen.

File Orientation

There are multiple buttons across the top of the file, as well as tabs depending on the selected button. This will vary depending on the file type chosen. **In this particular case we are focusing on a Purchase transaction.**

The buttons being covered in this guide are: **Basic, Mortgages, Issues, Financial,** and **Docs.**

If you want to return to the **Main** screen (where the file list is located), click **Main** (across the top of the screen, beside **Log Off**).

Databases

In **RealtiWeb**, majority of the databases are accessible with the database button beside the specific field. You may add, edit and delete specific database entries on the account level, resulting in your changes impacting other users at your firm. Alternatively, you can change data for that specific **RealtiWeb** file and not update your firm's database.

Field for Database	Location
Firm Contact	Basic → Basic Information
Conveyancer	Basic → Basic Information
Fire Insurance	Basic → Basic Information
City/Town	Basic → Property and Legal Description
Condo Corp. Name	Basic → Property and Legal Description
Condominium Contact	Basic → Property and Legal Description
Other Side's Lawyer	Basic → Contract Details
Real Estate Broker	Basic → Contract Details
Mortgage Lender	Mortgages
Favourite Clauses	Issues, Documents

Note: The fields **Condo Corp. Name** and **Condominium Contact** appear if the subject property is a Condominium.

The majority of the databases across **RealtiWeb** have a database button, **edit** and **clear** buttons. You are able to save your frequently used contacts and clauses to your firm's account. This saves you time later, when you are opening or updating a file.

For example, the **Fire Insurance** database is accessible through clicking the database button. Simply click on a name to use that insurance agent. Alternatively, you may select the blue **Edit** or **Copy** link to start editing the entry.

If the insurance agent you want is not in the database, you may add the insurance agent using the blue **Add** link in the heading of the list of Insurance Agents.

Clicking the blue **Add** link will allow you to enter the new insurance agent details.

After entering the insurance agent details click the **OK** button to add the agent to the file.

Note: If you want to use the insurance agent in other files (current or future), click **Update List** to add the agent to your firm's list.

Overwrite (Field turns Pink)

If a field is pink, it means the default text has been overwritten (meaning someone has manually typed in the field). If you want to change the text back to the default (and thus any changes will be removed), right click and select the **Remove Overwrite** option.

Working in Your File

Basic Button

The **Basic** button is the screen all files show after they are created (or after opening a file from your file list).

Under the **Basic** button there are 5 tabs: **Basic Information**, **Property and Legal Description**, **Contract Details**, **Title Search**, and **Writ Search**.

As information is entered into **RealtiWeb**, the system will be able to generate documents with the appropriate information. Inserting as much information as possible throughout your file will save you time.

Basic Information tab

The first tab, **Basic Information** is where the **Transferee(s)**, **Transferor(s)**, **Firm Contact**, **Conveyancer**, **Fire Insurance** and other basic information are added to or edited in the file.

Some of the fields may have been completed during file creation, such as **Transferee(s)**, **Firm Contact**, etc. Complete any fields that have not been completed. The more information included in your file, the more complete your documents will be throughout the transaction. You can always come back and add it.

The **edit** button to the right of some fields allows you to edit the information in that database record, for example a lawyer. Clicking on this button will open a screen that allows you to edit or enter this information.

Adding Purchaser/Transferee

To add a new Transferee, click the **edit** button beside the **Transferee(s)** field.

This will open the **Purchaser/Title Information** popup. Fill in the information from the Agreement of Purchase and Sale until you receive title instructions.

The **On Title** and **As per Agreement** checkboxes impact many of the documents in **RealtiWeb**. Completing these checkboxes will assist the system in determining the appropriate signatures to use, who to address various documents to, etc.

The **Main Contact** checkbox will show the client's name on the **Basic Information** tab along with the entered contact information. In addition, the **Ongoing Relationship** checkbox will activate clauses in documents specific for when a client has a long-term relationship with the firm.

The **Entitled to Provincial LTT Refund** checkbox will change how land transfer tax is calculated under the **Financial Button** (this will be covered in more detail under the **Financial Button** section of this guide). The **Joint Declaration/Capacity Statement** checkbox will add another data field to add the appropriate joint declaration/capacity of the purchasers.

As information is gathered regarding title you can enter information at a later time. Click on the **close** button when you have finished entering all required information.

Adding Seller/Transferor


Adding a transferor is similar to adding a transferee. From the **Basic Information** tab, click the **edit** button beside the **Transferor(s)** field. This will open the **Vendor/Transferor Information** popup, which looks similar to the **Purchaser/Title Information** popup. Complete the information you know about the transferor.

Adding Client Identification Verification Information

After adding your client(s) to the file, you can add their identification into the system by clicking the **Client ID** button. For the purposes of this guide a Purchase file is used, and therefore the **Client ID** button is next to the **edit** button for the **Transferee(s)**.

After clicking the **Client ID** button the **Identification Verification Information** popup will appear. This popup lists all the individuals listed in the file (signing officers, guarantor(s), etc) and the transferee(s)/transferor(s)/mortgagor(s) listed in the file (both individuals and corporations), depending on file type.

Follow these steps to add applicable identification for individuals into your file:

1. Enter the **Occupation(s)** for each person.
2. The **Birth Date** will pre-populate provided you have entered it under your client details.
3. Enter the **Verification Date** the individual's identification was verified.
4. Where there is a mortgage in your transaction, there is the ability to use either the **Single Process Method** or **Dual Process Method** for ID verification.
 - a. **Single Process Method:**
 - i. By default this method is already expanded.
 - ii. Enter the **Type of Identification** (use the database button to select commonly used documents) and application information regarding the ID. If you want to add more than two pieces of ID, click the **Add New** button to add more IDs.
 - b. **Dual Process Method:**
 - i. Click the plus icon () beside the **Dual Process Method** to expand the section.
 - ii. Use the database button underneath **Identification Document** to select commonly used documents, and complete the applicable information regarding the ID. If you want to add more than two pieces of ID, click the **Add New** button to add more IDs.

If you have a corporation as a client, the **Corporate Information** section will show underneath the **Individual Information** section. Enter in the applicable fields (for example **Type of Entity**, **Reg #**, **Type of Record referred to**, and **Source of Electronic Version**) identifying the corporation.

At the top of the screen Documents are available for Client Identification Information. **Create Document - Bank Forms - Identification Verification Form - PDF** will provide you with the Lenders

specific document (if available). **Create Document - Client Identification Information** is a LDD source document which you may use for your file if there is no Mortgage.

Adding Other Parties in the Real Property Transaction

Please [refer to the Database section](#) for completing **Firm Contact**, **Conveyancer**, and **Fire Insurance**.

Property and Legal Description tab

The following tab, **Property and Legal Description** is where you enter the subject property address, type and legal description.

By clicking the **edit** button beside the **City/Town** field, a popup will open for information to be entered regarding the costs of tax certificates, building and zoning reports, etc.

The **City/Town** field impacts other *RealtiWeb* features and fields, such as automatically selecting **Land Registry Office**, **Assessment Roll No.**, **Condo Corp Names**, **Plan Numbers**, and fields in the **Legal Description** box.

Note: It is possible to bring in the property information from the Title Search tab, refer to the [Title & Writ Search User Guide](#) (found in the Title Search tab).

The **Property Type** dropdown is important to complete. The field indicates to *RealtiWeb* if the subject property is a freehold or condominium, and will impact what is displayed on each screen (similar to how Purchase files are slightly different from Sale files).

Note: If you want to indicate a Parcel of Tied Land (POTL) for a freehold, checkoff the **t/w Common Elements?** checkbox.

Contract Details tab

This tab includes all information pertaining to the Agreement of Purchase and Sale, with some overlap from the previously completed tabs, such as **Contract Date**, **Closing Date**, **Contract Price**, **Transferee(s)**, and **Transferor(s)**.

New or Resale Property

The radio button '**Is this a new home purchased from a builder?**' will help the program to determine what should be shown.

For example, if the home is being purchased from a builder, answering 'yes' will show all the important fields pertaining to new homes, such as GST/HST rebate, TARION, etc.

If the subject property is not a new home (a.k.a. resale) then, a question regarding vacant land will appear.

Real Estate Broker

Enter the real estate agent or broker using the database button. Complete the **Real Estate Commission** information.

Title Search and Writ Search tabs

The last two tabs (**Title Search** and **Writ Search**) are available to use, if you (or your firm) have a Teranet Connect account. This is a subset of **Teraview on the Web**. You are able to search Land Titles and bring the information into **RealtiWeb**.

Refer to the **Teranet Connect Guide** for set up, and the [RealtiWeb Title Search Guide](#) for training on the **Title Search** (or **Writ Search**) tab. Both guides are accessible at the bottom of the page.

Mortgage Button

The **Mortgage** button is used to add new mortgages to the file. Existing mortgage on title are handled via the **Issues** button.

Lender selection

The first field that should be completed when adding a mortgage is the **Lender**, using the database button.

Note: The **Lender** that is selected affects what **Type of Mortgage** can be chosen.

The database button will open the **Mortgage Lender Database**.

The **Mortgage Lender Database** separates the lenders into two categories based on if the lender is a confirmed **TitlePLUS** lender or not. Any lender listed under **TitlePLUS Confirmed Lenders** is a lender who accepts TitlePLUS policies notwithstanding any absence of a reference to TitlePLUS title insurance in their instructions. If the lender is not listed under **TitlePLUS Confirmed Lenders** then see if it is listed under **Other Lenders** (or add it).

Click on the plus icon beside the name of the mortgage lender to expand the list of branches. The branch name you are hovering over will be highlighted.

You have two options for adding a lender to your file: adding a new lender branch, or editing an existing lender branch.

Method 1: Add a New Lender

Click on the blue **Add...** link under your selected lender to open the LawyerDoneDeal Web Page Dialog box. Enter the mortgage lender branch information in accordance with the instructions from the mortgage lender.

Click **Save** to add the branch to the firm's database. If your entry is to create a duplicate of an existing branch, click **Save as New**. This will create another entry with your amended information.

The branch of the mortgage lender you added will be added to the list for that mortgage lender.

Method 2: Editing an Existing Branch in the Lender Database

If you want to edit a branch entry, click the blue pencil (beside the trash bin icon). This will open the current branch information in a popup for editing.

Note: The blue trash bin icon will delete the branch entry from the **Mortgage Lender Database**. Caution - this action is not recoverable.

The lender's name and mortgage position will appear. Note: If you need to add more than 1 mortgage, click the **Add** tab to include additional mortgages.

Select Type of Mortgage

RealtiWeb includes the capability to pre-populate some of the **Charge Provisions** and **Schedules** for selected mortgage lenders (such as the big 5 banks), as well as bank forms such as request for funds and report to lender.

Select from the list of mortgage lenders (for example, Bank of Montreal).

Select a **Type of Mortgage** by clicking on the database button to the right of the **Type of Mortgage** field.

The **Select Mortgage Type** box opens. **Click** on the type of Charge/Mortgage in accordance with the instructions from the mortgage lender.

The applicable **Charge/Mortgage Provisions** will be pre-populated (if available). Note that in this example, the **Interest Rate**, **Calculation Period**, **Standard Charge Terms**, **Insurance** and additional provision fields have been pre-populated.

Enter the rest of the mortgage details in accordance with the instructions from the mortgage lender.

Calculating Mortgage Advance

Click the **edit** button next to **Mtg Adv \$**, to open up a blank window. Enter the applicable fees, and their amounts. By default **Debit** is selected.

Click **Set Advance** to update the **Mtg Adv** field on the previous screen and close this window. If the applicable fees are unknown, you may also type the Mtg Adv directly into the **Mtg Adv** field.

Add a Mortgage Schedule

To add a Charge/Mortgage Schedule, click on either **Additional Terms** or [Click here to go to Lender Schedules](#).

The **LawyerDoneDeal™ Web Page Dialog** box opens. Click on the **Add** button.

If there are available schedules, you are able to click on the database button to start selecting a schedule from the list.

If the database button is not shown, then you will have to click on the text underneath the **e-reg PDF** button, and either manually type or paste the schedule.

The **Select Mortgage Type** box opens a popup. Click on the type of Charge/Mortgage in accordance with the mortgage instructions. If you do not see the type of Charge/Mortgage required for your transaction, then close the **Select Mortgage Type** box and add in manually.

The selected **Schedule** will appear on the screen.

Note: Any empty data fields (a.k.a. grey boxes) need to be completed. When possible **RealtiWeb** will pull data into the data fields.

After entering the Charge/Mortgage provisions in accordance with the instructions from the mortgage lender, click **Close** at the bottom of the **Schedule**.

The **Schedule** will be included with the e-reg™ export the Charge/Mortgage to e-reg.

Specifics for **TitlePLUS**® deal

If the file is a **TitlePLUS** deal, the question **Is this Mortgage TP Insured?** will be displayed.

If using TitlePLUS and the mortgage is TitlePLUS insured, check off the checkbox to indicate “yes”. The checkbox will be checked off if you have indicated this deal is a **TitlePLUS** deal on the **Basic Information** tab.

The **TitlePLUS** wallpaper will appear with **TitlePLUS** related questions and fields to be completed.

Issues Button

The **Issues** button has five tabs: **Master Issues List**, **Inquiry Status**, **Requisition**, **Checklist**, **Report**.

Master Issues List tab

The **Masters Issues List** tab is for you to add any action items or issues with the transaction. For the purposes of this guide, we will be doing a non-TitlePLUS deal.

How to create an issue

There are two ways to add issues:

1. Manual entry
2. Title search matching

Manual Entry

The issues are divided into categories. Click on the applicable category, such as **Mortgages (Discharge/Assumed/Remaining/Postpone)**.

A new window will appear with specific issues related to the selected category. As you hover over TitlePLUS specific issues (on the left side), text will appear on the right side.

Click on the appropriate issue name. A new screen will open, the **Issues WorkBench**. This is meant to be used for assisting in creating your documents, such as inquiry letters and undertakings. The **Issues WorkBench** brings in data from elsewhere in the file (or Title Search) and provides text for your reports, closing checklist, etc. for the particular issue.

You have the ability to edit the default text and add your own (right click the clause you want to save and select **Save current text as new clause in the clause list**).

Each issue works in a similar manner.

Title Search Matching using Teranet Connect

Alternatively, you can use the matching feature on the **Title Search** tab after you have completed the initial title search (for how to complete a title search, please refer to our full **RealtiWeb Title Search Guide**: <https://www.lawyerdonedeal.com/rplus/ON5/pdf/TitleSearchUserGuide.pdf>). Specifically, refer to **Activate Instruments in Realtime Issues List** (page 15) as it is the most relevant for importing Teranet Connect search results into the **Issues List**.

If you return to the **Issues** tab, you will see the created issue. The name of the issue will use the type of issue, instrument number (from Teranet Connect), and the registered date.

Carrying out actions from the Action List

The **Action List** changes dynamically based on the specific actions to be carried out for the specific issue. There are a possibility of 9 items:

- **Letter Inquiry**
- **Requisition**
- **Checklist**
- **Reporting Letter**
- **Undertaking**
- **Adjust/Payout**
- **Calendar**
- **TitlePLUS** - *only appears if TitlePLUS is part of the deal*
- **Similar Name** - *only if outstanding Executions*

Majority of each item listed in the **Action List** has a corresponding document. Clicking on an item in the **Action List** will change which clause you are editing.

Clauses

Each clause consists of the description and action clause.

The data fields in the text will be completed if the data has been entered throughout **RealtiWeb** or from the title search import. You may overwrite the text if needed. If manually entering an issue, the issue may have additional fields to be completed.

If you right click on the clause, you will see the various editing options for the text. This is what the various options do:

Cut	The text is removed from the clause and able to be pasted elsewhere.
Copy	This copies the text to your computer's clipboard.
Paste	This pastes the text on your computer's clipboard (with no formatting) to the clause.

Paste with Format	This pastes the text on your computer's clipboard with formatting.
Insert Defect Field	A popup window will appear with a list of possible fields. These fields will pull data previously entered into the file in the clause. When the field is updated, the clause will also be updated.
Select all in text box	This will select all text in the clause. It is useful if you want to copy/remove the full clause text.
Restore to LDD default	Selecting this will return the clause back to LDD's standard clause text.
Select another clause	Clicking this will open your firm's Favourite Clause database (also accessible by using the database button).
Save current text as default	This will overwrite the current default clause with the currently selected clause for the document. If you open another file with the same issue, then the clause for your document will not be the LDD standard clause text. Instead your saved default clause will be used for the document.
Save changes of current text in clause list	This will update the clause text in your firm's database.
Retrieve Default	This will return the clause to its saved default version. Note: <i>This is the default version for your firm account, and could be different from LDD's standard default clause.</i>
Save current text as new clause in clause list	This will save the clause as a new clause in your firm's database.
Remove this clause from the list	This removes the clause from your firm's database.

Drafting Documents

If there is a corresponding document for the action available, a **blue Create Document** will be near the bottom of the **Action List**. The blue link will state the document that will be merged for viewing. For example, clicking the **Create Document - Checklist** will merge the Checklist document.

Adjust/Payout and Calendar Action

The **Adjust/Payout** item will let you determine how to include the adjustment (or payout) in the **Statement of Adjustments** or **Trust Statement**. There may be additional fields to be completed. The **Calendar** item allows you to add a reminder to your **RealtiWeb Calendar**.

Inquiry Status, Requisition, Checklist, and Report tabs

These enable you to manage the issues:

- **Inquiry Status:** function to manage non-title inquires, such as a mortgage discharge
- **Requisition:** view custom additions to the Requisition letter
- **Checklist:** view items added to the standard Checklist
- **Report:** view the added text to the standard Report

Financial Button

Here you are able to review and modify the financial information related to the file, under the six tabs: **Stmt of Adjustments**, **LTT**, **LTT Refund**, **Account to Client**, **Trust Statement**, and **Closing Funds Summary**. At the top of the page for each tab, there is a blue link to create the relevant document.

Statement of Adjustments

Consideration and Deposits come from information entered in the **Basic** button → **Contract** tab. The Consideration is calculated based on the contract price.

Click **Add** to add further required adjustments. Click the dropdown menu to show the list of possible adjustments to add.

As an example if you select **Property Taxes**, in the popup that appears and you can complete the **Tax Adjustment**.

LTT

This tab is intended for calculating the fees associated with the **Land Transfer Tax** including any refund/rebate your clients are entitled to. If your purchasing client qualifies for the LTT refund, please indicate he/she is entitled on the **Purchaser/Title Information** popup (refer to the next section on **LTT Refund** tab).

The **LTT** is completed based on the **Purchase Price** in the **Basic** button → **Contract Details** tab.

Document Control dropdown sets the LTT Form for the transferee or agent/solicitor to sign the document. For a completed LTT Form address the statements by checking off the applicable checkboxes, and editing the transferor and transferee details.

If your clients are subject to the Non-Resident Speculation Tax, please use the **NRST** checkbox.

Note: The LTT form does not export to Teranet (e-reg), it needs to be manually completed in the e-reg system.

If the subject property is in Toronto, then Toronto's Municipality Land Transfer Tax (MLTT) is added to the tax total.

LTT Refund

If your clients are first time home buyers and entitled to the Land Tax Refund, that information is added on the **Transferee(s)** popup (found under the **Basic** button → **Basic Information** tab).

If you have checked off the above checkboxes, the applicable refunds will be shown on the **LTT Refund** tab. If land transfer tax is included in your trust statement then the applicable refunds will also appear there.

Account to Client tab

The **Account to Client** tab is intended to show you what is being charged for fees and disbursements, and if applicable how much of the account is being paid from the trust.

Note: Firm settings can impact this tab and what is shown based on the firm settings setup.

Review the **Auto Include?** box in the **Financial Functions** box on the right of the screen. Anything already checked off, is from your firm settings. If you check or uncheck an item, then the item will be added or removed from the **Account to Client**.

Note: Any changes here will only be for this file and will not impact other files.

If one of the accounting integrations is enabled for your firm (PCLaw or CosmoLex), then you will see an area for enabling the export and the necessary fields. For more information please see the [Accounting Integration guides](#).

Trust Statement

The **Trust Statement** brings in data from several places in the **RealtiWeb** file. The **Paid** section is filled in from several locations. For example, the Balance Due on Closing is taken from the **Statement of Adjustments** tab, the Land Transfer Tax is from the **LTT** tab, and the Statement of Account is from the **Account to Client** tab.

Meanwhile, the **Received** section completes any received amounts from the **Mortgage Advance** from the Mortgage Screen. Any additional funds from the client will need to be entered manually here.

Other items from previous tabs can be included when applicable. To manually add other items you can, either type in the text box, click the database button for preset options, or the **edit** button. The **edit** button will open the following screen and allow for manual entry.

Closing Funds Summary

The **Balance Due on Closing** is carried over from the **Statement of Adjustments**.

If there is a mortgage, then the mortgage amount will populate from the **Mortgage Advance** from the **Mortgage** screen.

The estimated fees, disbursements, etc are inserted from the **Account to Client** tab.

Note: Amounts entered into the **Closing Funds Summary** will not go into any of the previous tabs.

Docs Button

On the **Docs** button you can create the letters and documents you need for your real estate transaction. Each document pulls information from the **RealtiWeb** file.

Document Control Items

Before you print (or send) a document for signing you may want to change the date, signing location, and/or delivery notation on the document. The chevron beside the **Document Control Items** heading, will expand to show the full array of controls.

The settings here are completed based on your firm settings, and can be modified for the specific file. The **Document Date** defaults to the date the document was merged (a.k.a. created). The **Use Electronic Signature?** checkbox will e-sign your documents as the lawyer on file, using LawyerDoneDeal's e-signing technology.

Document Organization

There are three ways to view the available documents listed: **Category**, **Alphabetically**, and **Package**.

The documents have been sorted by LawyerDoneDeal into categories and packages. You may click the radio buttons to switch the sorting by **Category**, **Package** or **Alphabetically**.

The packages are designed to quickly generate documents into one. Simply right-click a package name to see the potential options.

Searching for a Specific Document

If you have an idea of the document title, enter the title into the filter box. This will filter the available document titles and show you all the documents with the entered word(s) in the title.

Document Merging Tool

As you are merging documents, you will be able to keep track of which documents are defaults of **RealtiWeb**, your own custom documents and which documents were merged. The **Document Merging Tool** is to help remind you of the colour legend and manage your document merging.

Document Colour Legend

The colours of the document names relate to the type of document. The **Document Colour Legend** is always available on the right-side of the **Docs** screen. Simply click the black chevron beside the text to expand/collapse the legend.

Note: Any document names that are listed in *italics* are PDF files and are maintained by LawyerDoneDeal.

Multiple Document Merging

This feature is designed to allow you to merge several documents at the same time. Hold the **Ctrl** key (on your keyboard) and click the documents in the list. The document names selected will appear in the **Document Merging Tool** under the **Multiple Document Merging** heading.

If you want to remove a document, then hold the **Ctrl** key and click the document in the list again.

The four buttons are:

- **Post:** This will initiate posting the selected documents to the other side's lawyer.
- **Merge:** This will generate the chosen documents.
- **Clear:** This will deselect the chosen documents.
- **More:** This opens a list of options available. Specifically, useful if you want a group of documents to be emailed or saved as an MS Word or PDF file.

Creating Documents

After finding the document you want to draft, click the title and it will merge the document in a new window. On the main **Docs** button screen the file will have a green checkmark at the end of the name. If you click the green checkmark, you will be able to see the history of the document.

Editing documents

You can edit the document from the opened window, similar to how you edit a **MS Word** document. If you right click a clause, you will see additional editing options.

If you want to change the text of a clause, double click the clause. This will open with a border around the section the clause is in. You can start typing your changes. Once finished, click outside of the bordered section.

Note: If you do not click outside of the box before saving or printing, the box lines will be frozen in your file. To remove the box lines, you will have to restore the document back to its default. You will lose all your changes.

Saving and Printing Documents

The top of the opened document will have the following options: **Save, Save As, Print, Print Preview, Share, PDF, MS Word** and **OpenOffice**.

The **Save** option will freeze your document in the **RealtiWeb** file. This will prevent the specific document from updating as more information is added to the **RealtiWeb** file. The **Save As** option will allow you to save a different version of the document using a name you decide. All saved documents will have a document icon at the end of the title in **RealtiWeb**.

The **Share** allows you to email the document (up to 5 people) or post to **LDD's Web Document Retrieval** to other lawyers.

The options **PDF, MS Word** and **OpenOffice** allow you to open and/or save a version of the document in the respective program.

Specialty Tools

Label/Envelope/Fax

The **Label/Envelope/Fax** button will easily produce labels, envelopes and fax cover sheets for your files. This uses contact information in a file to create the labels, envelopes and fax cover sheets you require.

If you change the contact information in **RealtiWeb**, the information will automatically be updated here. You may add additional parties that are not in **RealtiWeb**, by adding their name under **Extra Contacts**.

If you want more details, please see our guide accessible from the **Help** button (beside the **Setup** button).

OREA Forms

If you have subscribed to the OREA Standard Forms with LawyerDoneDeal, you will be able to complete your transaction from the creation of your Agreement of Purchase and Sale to finishing your Final Reports after the close of your transaction all using RealTiWeb. If you click on the button **OREA Forms** and you have subscribed you will see a popup window, allowing you to complete the pertinent details of your Agreements, Schedules, etc.

The 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 forms area. All the standard OREA clauses with regard to conditions, mortgages, etc are available through LDD. 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 indicating you are not subscribed, clicking “**OK**” will send you to a new page where you can subscribe to the OREA Standard Forms through LawyerDoneDeal. To subscribe to the OREA Standard Forms, click **Purchase** to start the process of subscribing.

Title Insurance Button

On the **Title Insurance** button, select the title insurance provider for the transaction, or select “**N/A**”. This is where title insurance provider details are accessed in **RealtiWeb**. [Refer to our title insurance page for help.](#)

Uploading to Teraview and Teranet Express

RealtiWeb allows exporting information from your file into Teraview and Teranet Express. Someone at the firm with administrative rights should save the firm’s Teraview account name and TV number under **3rd Party Account Information** in **Firm Settings**. Individual users of the firm should save their Teraview credentials under their **User Settings** (under the **Tools** dropdown menu across the top).

Prescribed Information for the Purposes of Section 5.0.1 Form Info to Teranet Express

If the Teraview account name and TV number of the firm are saved under **Firm Settings**, then **RealtiWeb** will log into Teranet Express and create/access the Prescribed Information for the Purposes of Section 5.0.1 Form (PIPS).

In the file you want to create the PIPS form for, click on the chevron next to the **Basic** button and click **Export to e-reg** to open a popup. In the popup, click the **Create** button beside **PIPS Form**.

Teranet Express will open, and **RealtiWeb** will go through the process of uploading the applicable information, including PIN(s), Transferee(s) (Individuals or Corporations), and Date of Birth.

You will then complete the form as required on the Teranet Express site.

The **Form ID** field (on the **Export to e-reg** popup) will automatically come in from Teranet Express.

Note: Remember to save your file after clicking **Create**.

If you have not yet submitted the form, clicking on the **Open PIPS** button will launch the Teranet Express and bring you the correct form (assuming the **Form ID** is filled in).

Upload Transfers, Charges/Mortgages, Discharges and Document Generals to Teraview

RealtiWeb has the ability to export to Teraview, accessed from the **Export to e-reg** menu option under the **Basic** button dropdown.

Important: Go to **User Settings** (under the **Tools** menu) to set up your Teraview credentials before trying to upload to Teraview.

When you are ready to send information to Teraview. Click **Export to e-reg** from the **Basic** button dropdown menu (accessed by clicking the chevron beside the **Basic** button).

In the **Export To e-reg** popup, it shows the **Docket ID**, **Docket Name** and **LRO #** fields for the docket in Teraview. These can be changed as necessary.

Select the instruments and document general items you want to send to Teraview. For example, the transfer, charge(s), discharge(s) or any of the numerous document general options available in **RealtiWeb**.

After selecting what to send to Teraview, click on the **TVWeb** button. This will open a new browser window with Teraview loaded. **RealtiWeb** will go through the process of uploading everything selected.

When **RealtiWeb** is finished, there will be a notification that it's finished. However, Teraview is still updating. You can check the status of your upload in Teraview under **Projects**.

Note: Record the **Request ID number** from Teraview for future reference.

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