

Calendar Feature in RealtiWeb

The calendar in RealtiWeb™ can be accessed from the Main Page, underneath your file list (shown in the first picture), as well as at the top right-hand corner of every screen within a file (shown in the second picture).

The screenshot shows the RealtiWeb main page. At the top, there is a navigation bar with links for File, Tools, Accounting, Help, Main, and Log Off. Below this, the current login is identified as LDDCORP / emily. The 'Files' section contains a table with the following data:

Reference Line	File No.	TP Status	Closing Date	PSM
Aason p/f Aason	dfd		30/SEP/2008	O
Doe and Carebears Inc. p/f Chan	suzi-aug18-08	Preliminary	18/JUL/2008	P
Doe p/f Smith	20070100-01-v		26/DEC/2008	P
Fish p/f Crab	33333		25/DEC/2008	P
Frank Franklin p/f	3333		01/FEB/2008	P
Hackensack s/t Smithers	1022		26/NOV/2008	S
Haikola s/t Smithers	salefile		31/JUL/2008	S
Lavender and Flower corp. s/t Chan	ereg idicate			S
Liu p/f Doe	9999999		30/SEP/2008	P
RAYMOND m/t The Toronto-Dominion Bank	fqfdq		22/DEC/2008	M

Below the table are 'VIEW' options for Recent files, Active files, and Archived files, along with an 'Edit List' link. The 'Calendar' tab is highlighted with a red circle.

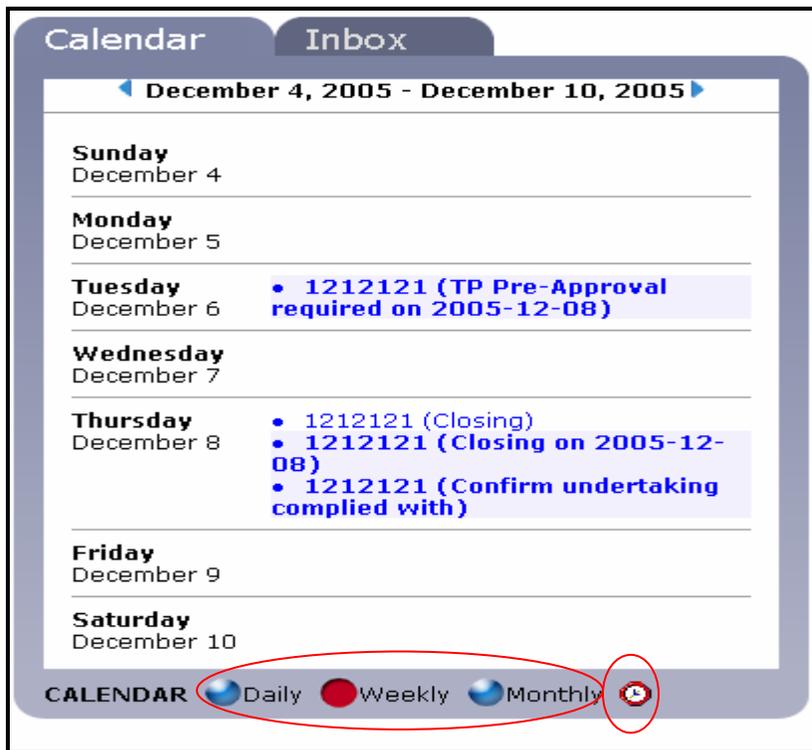
The screenshot shows a file detail page for 'Purchase File #: 234234324asd'. The page includes a navigation bar with icons for Basic, Mortgages, Issues, Financial, Docs, and TitlePLUS. A calendar icon is circled in red, and a red arrow points to it from the right side of the page.

Calendar Views

You can choose to view the calendar **Daily**, **Weekly** or **Monthly**. The default setting is the **Weekly** view.

To select the daily view, click **Daily** from the bottom of the Calendar screen. To select the monthly view, click on **Monthly** from the bottom of the Calendar screen.

Note: Clicking on an item in the calendar will take you directly to that file.



The clock icon to the right of the **Daily**, **Weekly** and **Monthly** buttons is where you can add appointments to the calendar. Clicking on it will open a window that allows you to select the appointment type, the details of the appointment, the date and time the appointment needs to be performed, whether or not the appointment is private (which will limit who can access or see the appointment), and the file to which to link the appointment.

Calendar Preferences

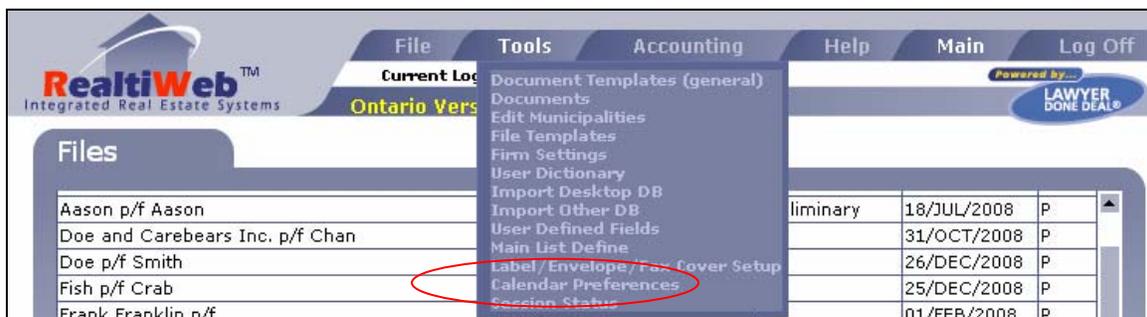
You can add many dates to your calendar to remind you of important events that are going to take place on any of your files. The system sets up the following standard dates for you automatically (all default system preferences can be modified):

- Closing Date
- Tickler for Closing Date
- Requisition Date
- Tickler for 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

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**, then **Calendar Preferences**.



Use **Calendar Preferences** to do the following:

- Select whether you wish to show files on the calendar with the client name or file #.
- For a particular date, select the number of days to display the date relative to another date, for example:
 - You can set up the **Closing Date Tickler** to display 3 days before closing.
 - You would set up the **Closing Date** to display on the Closing Date itself.

Calendar Preferences

Changing Calendar Preferences
When you make a change to a calendar preference, first save your change here. Changes for an individual file will display on the calendar after you go into that file and save it.

Display on Clerk Calendar/ Display on Another Person's Calendar
For those firms logging in with multi-lawyer capability, calendar entries will show on every user's calendar unless you select "Display on Clerk Calendar" or "Display on Another Person's Calendar". If you login with an LSUC ID, then DO NOT use the Clerk or Another Person's calendar indicators.

Show files on Calendar by
 Client Name File #

Standard items

Description	Display	Date	Display on Clerk Calendar	Display on Another Person's Calendar
<input checked="" type="checkbox"/> Closing Date Tickler	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Closing Date	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Requisition Date Tickler	<input type="checkbox"/> days	Requisition Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Requisition	<input type="checkbox"/> days	Requisition Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> TP Pre-Approval Tickler	2 days before	ClosingDate	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Undertakings Complied with Tickler	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Mortgage Discharge Undertaking Complied with Tickler	60 days after	Closing Date	<input type="checkbox"/>	
<input type="checkbox"/> Outstanding Issues Resolved Before Closing Tickler	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input type="checkbox"/> Outstanding Issues Resolved After Closing	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input type="checkbox"/> Title Search Ordered	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	



Standard items

Description	Display	Date	Display on Clerk Calendar	Display on Another Person's Calendar
<input checked="" type="checkbox"/> Closing Date Tickler	3 days before	Closing Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Closing Date	<input type="checkbox"/> days	Closing Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Requisition Date Tickler	2 days before	Requisition Date	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Requisition	<input type="checkbox"/> days	Requisition Date	<input type="checkbox"/>	

- If you are logging in with **Advanced User Access**:
 - To show the event on everyone's calendar, leave the **Display On Clerk Calendar** and **Display on Another Person's Calendar** unchecked.
 - To show the event on just the Firm Contact's calendar, select **Display on Clerk Calendar**
 - To show the event on someone else's calendar, select that person from the dropdown underneath **Display on Another Person's Calendar**
- If you are logging in *without* **Advanced User Access**:
 - If you login with an LSUC ID, then DO NOT use the Clerk or Another Person's calendar indicators.
 - When making changes to a calendar preference, save it here. Changes for an individual file will display on the calendar only after you go into that file and save it.

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