

May 30, 2014

## UPGRADE NOTICE

The Conveyancer Version 16.2A is now available for upgrade. This version contains a major enhancement to Electronic Mortgage Processing (EMP) provided by Stewart Assyst Real Estate powered by TELUS.

In this version, we have also included other new features that will continue to improve your workflow and help minimize errors. This is the second of four significant releases planned for The Conveyancer throughout 2014.

### Stewart Assyst Real Estate Supports Multiple TD Canada Trust EMP Mortgages

You may now attach up to four EMP mortgages to a transaction record when the lender is TD Bank.

- Each EMP deal must be assigned individually. The same steps you perform today for one EMP deal have to be performed for each EMP deal in the record (i.e. up to four times).
- When viewing new mortgage instructions, note that the **by borrower** column is now the default sort column.
- The **Mortgage Registration #** and **Date** fields are no longer mandatory when requesting a "Request for Funds".
- For more information, refer to the Stewart Assyst [Quick Start Guide](#) and [Reference Guide](#).

### Fix for Issue with Adobe® Reader® and Acrobat® Version XI

In May 2013, upgraded versions of Adobe Reader and Acrobat were released; however, these updates prevented documents in the **Forms** tab of The Conveyancer from being generated. This version of The Conveyancer contains a fix to this problem and you may now upgrade Adobe Reader and Acrobat to Version XI.

## General Enhancements

**Specifying Gender** – For NextSTEPS from Stewart Title, specifying gender for a party is no longer required.

**Archiving** – Transaction records for which the LOFTI premium remains unpaid can now be archived.

**Larger Text Box** – Increased size of the municipality text box in lawyer and law clerk (legal assistant) profiles.

## Dividing the Real Estate Commission

Have you ever been asked to prepare commission cheques for both the selling and listing brokers? We have developed a simple way for you to do this via the **RE: Broker / commission** topic of a Sale transaction record.

- A new field labeled **Commission paid to** has been added to Tab H of a Sale transaction record. When set to **Vendor's broker only**, the program continues to behave as before; when set to **both Vendor's and Purchaser's brokers**, fields related to the different brokers appear.
- Indicate if the commissions should appear as separate entries in the Trust Ledger.
  - In the Trust Ledger, click F9 to populate the fields with the commission(s) calculated in Tab H.
- Indicate whether the commission will be based on a fixed percentage of a sale price (or a fixed amount).
  - If based on a fixed percentage, enter the total commission percentage and the vendor's and purchaser's brokers' percentage of commission.
  - Commissions are automatically calculated.
- There is a new **Deposit held by** field which is defaulted to **Vendors**. When this field is set to Vendors and the commission is a percentage, then the **Deposit** field appears for the Vendor's broker. If the **Deposit held by** field is set to Purchasers and the commission is a percentage, the **Deposit** field appears for the Purchaser's broker.
- In **Configuration > Other**, select whether the default option for the real estate commission will be **vendor's broker only** or **both Vendor's and Purchaser's broker** in new records.



## Displaying the Cash Shortfall Amount in the Trust Ledger Statement

Instead of manually adding a line to the Trust Ledger to indicate a Cash Shortfall, The Conveyancer will now do this automatically for you.

If you wish to display the Cash Shortfall in all new records, go to **Configuration > Trust Ledger Statement** and check **Automatically insert “Cash Shortfall” as required**. This feature can also be activated for the current record in the Trust Ledger topic.

- Note the following special handling for Mortgage transaction records when using this feature:
  - If the **Auto Insert F9** and **Cash Shortfall** boxes are both checked and the **Received from you** row is read-only, the value is set to \$0.00 and the field is editable.
- The cash shortfall row cannot be deleted or itemized.
- If the cash shortfall is \$0.00 or there is no shortfall, then the row is automatically deleted.

You may change the description **Cash Shortfall** to whatever you prefer.

## Need Help Upgrading?

Visit the [Customer Resource Centre](#) for instructions or contact Customer Service at 1.866.367.7648 or [inquiries@doprocess.com](mailto:inquiries@doprocess.com).

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