

October 8, 2014

## UPGRADE NOTICE

The Conveyancer Version 16.3B is now available for upgrade. This version contains a variety of new features that will continue to improve your workflow and help minimize errors. This is the third of four significant releases planned for The Conveyancer throughout 2014.

### Support for Bridge Financing

The Conveyancer now supports Bridge Financing in Purchase and Sale transaction records. Use this time-saving feature accessed from the Mortgages topic to help your clients bridge the gap when they have two different buying and selling transaction dates and require a short-term loan.

Note that the "bridge financing" loan must be the last priority in Purchase and Sale transactions and there can only be one mortgage designated as "bridge financing".

When bridge financing is selected, a Receipt line or a Paid to item is automatically added to the Trust Ledger, appearing as "Received from Bridge Financing - <bank name>" or "Paid to Bridge Financing <bank name>".

To designate a loan as Bridge Financing:

- In a Purchase record > Tab G > <mortgage #> Mtgee > select "Bridge Financing" in the "Is Mtg-New/Assume/VTB/Bridge Loan" field.
- In a Sale record > Tab F > Existing <mortgage #> Mtg > select "Bridge Financing" in the "Mortgage is to" field.

Existing Master Documents have been updated to support Bridge Financing and new ones have been added. Go to Updates > Import selected master documents from Do Process Software and search for new and revised documents in the Purchase Masters and Sale Masters categories.

- **If you modify the Master Documents for your firm, it is strongly recommended that you make a backup of your Master Documents folder (i.e. \tcwin\Masters) before updating your documents.**

## Introducing the NEW Do Process Help Centre

The NEW Online Help Centre provides access to support and training materials 24/7 for your convenience. From the Help Desk you can open a request and interact with live agents during business hours. The new system efficiently expedites and manages requests for even faster resolutions.

- On the Home Page, click [Help Centre](#) to access valuable material about The Conveyancer, such as support guides and training videos.
- In the Document Production topic, click [Letterhead Request](#) or [Master Document Request](#) to access the appropriate form. Remember to attach samples.

On Forms tab > Lender Documents, click [Request New Form](#) to access the appropriate form.

## It's Reward Time

When adding a new solicitor (either in the Solicitors' Database or in Tab C), you have the opportunity to refer your colleagues to Do Process and earn Referral Rewards! Click the [referralreward\$] button and earn up to \$75 each time you submit a successful referral to Do Process!

## General Enhancements

**Insert Names of Parties in Trust Ledger** – In the Trust Ledger, you have the option to automatically insert the names of parties into the appropriate line item.

- This feature is set by the Default user in Configuration > Trust Ledger Statement > Show name(s) in all Trust Ledger entries.
- For example, when this feature is activated, the name of your client(s) will appear in the "Received from you" line item.

**Support for Mobile Homes on GST/HST Form** – Mobile Home information is now supported on the GST/HST New Housing Rebate Application.

**Including New Items in Statement of Account & Trust Ledger** – Include new items added in Configuration to the Trust Ledger or to disbursements in the Statement of Account.

- To ensure these items appear in an existing Purchase, Sale or Mortgage transaction record, press [Reset] in the Statement of Account and Trust Ledger topics.
- The new items will automatically be included in new records

**CMHC Mortgage Default** – The default value for CMHC Mortgage? has been changed to N/y in Tab G.

**STGC Premium Calculator** – When selecting title insurance from Stewart Title Guaranty Company in the LOFTI box accessed from Tab A, view the Premium Calculator by clicking on the link.

**Real Estate Broker/Commission** – For the Real Estate Broker / Commission, when there is a single RE broker who is holding the deposit, the deposit appears in the Trust Ledger as a receipt.

## How Do You Upgrade?

All users must log out of The Conveyancer during the upgrade. Then the Default user goes to **Configuration > Live Upgrade > [Check for Update]** and follows the installation directions. If you require further assistance, contact Customer Service at 1.866.367.7648 or [inquiries@doprocess.com](mailto:inquiries@doprocess.com)

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