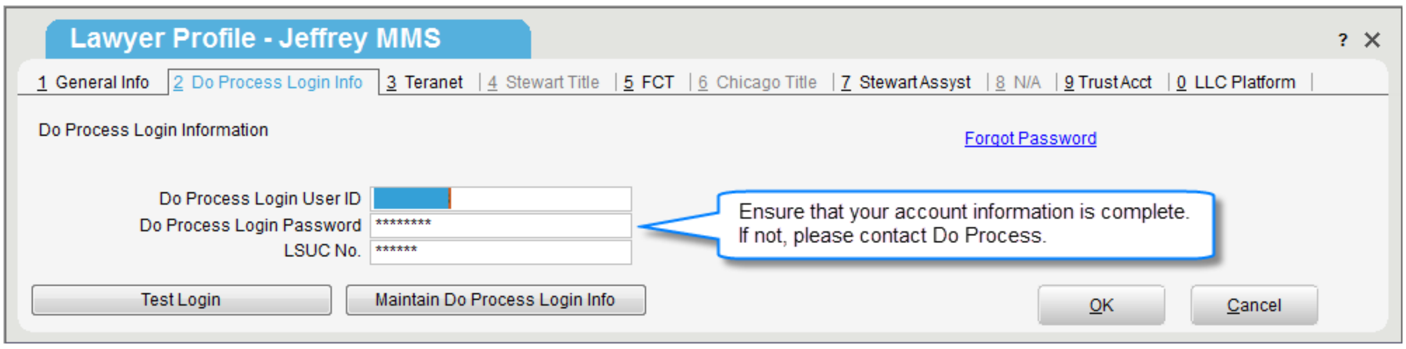
LLC Quick Reference Guide

The Conveyancer® (Do Process Software LP)

Once you obtain your User ID and Password from FCT by email and you are ready to setup your LLC Account, log into The Conveyancer application.

Step 1 – Confirm the Do Process Login Info is completed

To confirm, click the Databases button, click option '8 Lawyer Profiles', highlight the applicable lawyer from the list, click [**Edit**] and then Tab '2 Do Process Login Info'. Your screen should look like this:

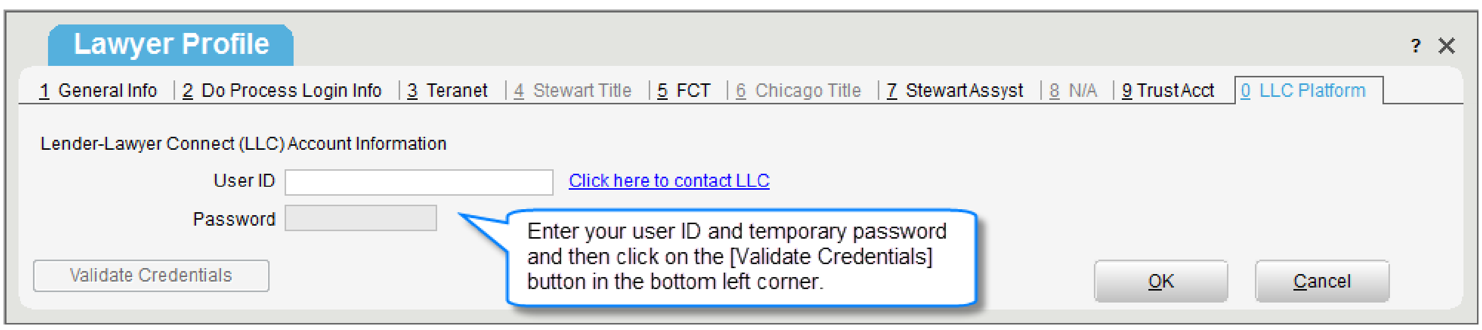


If you have Do Process credentials but have not entered them on this page, do so now, and then test your credentials by selecting [**Test Login**]. If you receive an error message, contact Do Process Support at 416.322.6111 (1.866.367.7648) for further assistance.

If new credentials are required, please complete and print the form located at http://www.lawyercentric.com/Main/Lawyers/Services_Register.aspx and then send email to inquiries@doprocess.com.

Step 2 – Complete your User ID and Password within Tab '0 LLC Platform' and validate your LLC Credentials

Once your LLC credentials have been validated, you will be prompted to change your temporary password and will be instructed to create a new password and then confirm it.

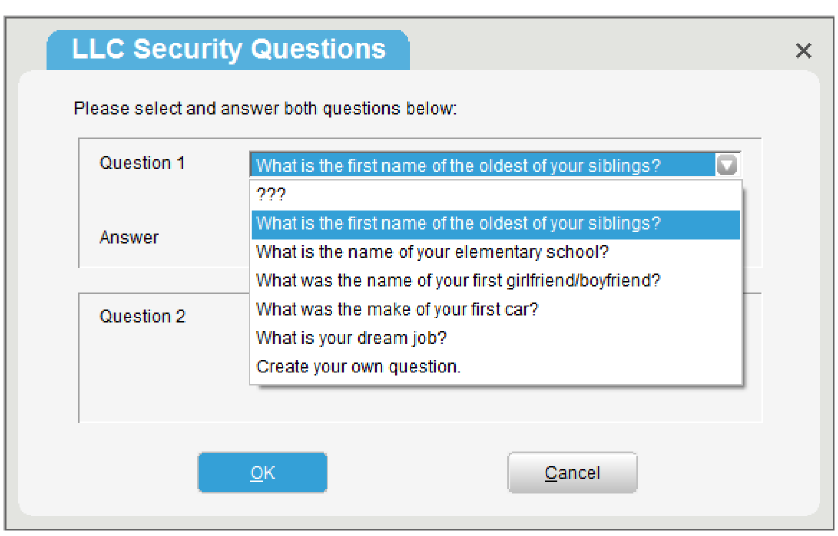


✎ Note: *If your 'New Password' and 'Confirm Password' are not the same, you will not be able to proceed.*

Networked Version: you are only required to enter the new password at one desktop.
Multiple Stand Alone Versions: you are required to enter the new password at each desktop.

Step 3 – Define the LLC Password Security Questions and Answers

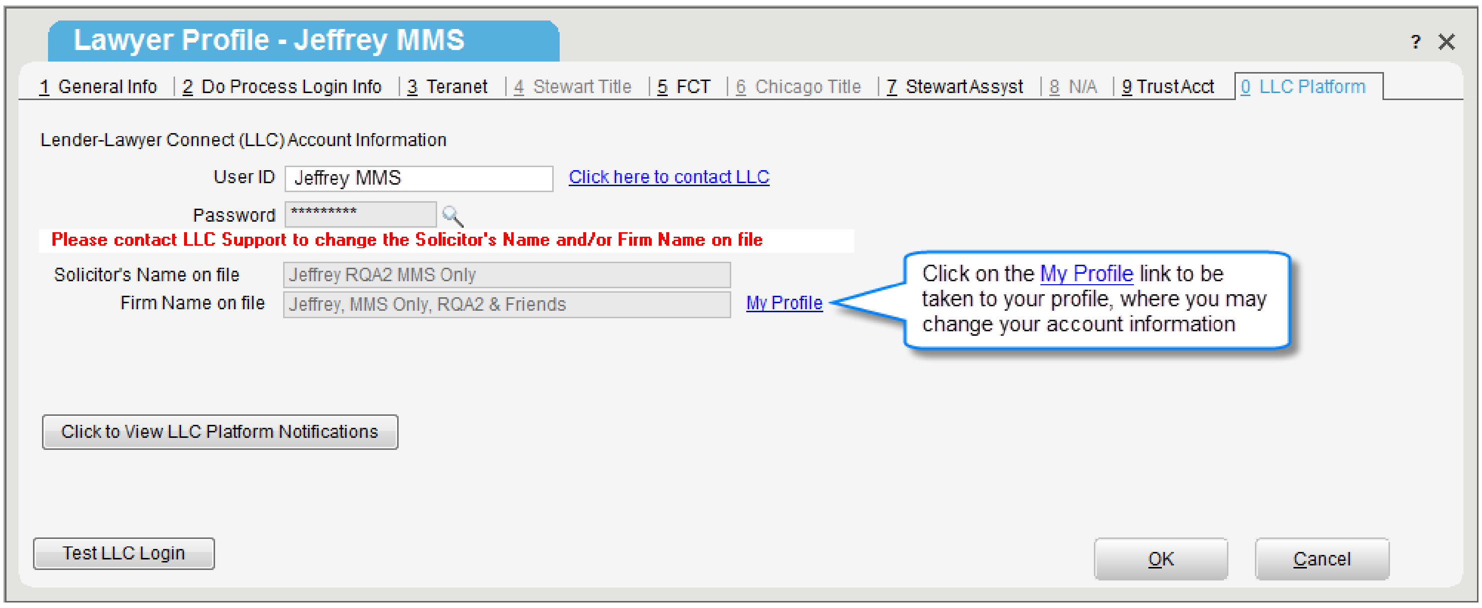
Once you have completed your password change, you will be prompted to complete two Password Security questions. You can select a pre-defined question or create your own.



✎ Note: *Security answers must have a minimum of 6 characters.*

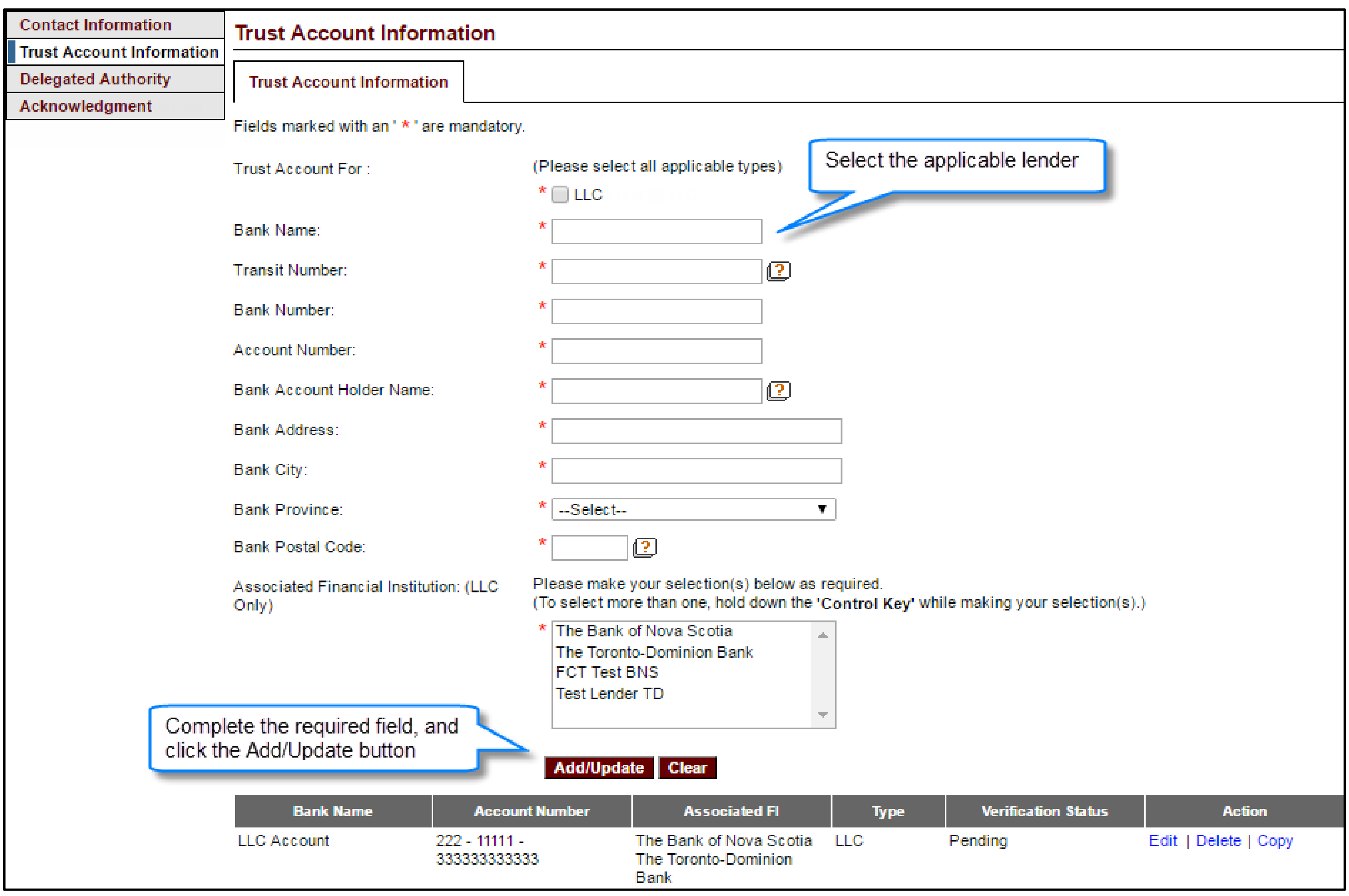
Step 4 – Set up the LLC Trust Account

Add the lawyer's trust account information (the account that the mortgage proceeds will be deposited into), by selecting the My Profile link on Tab '0 LLC Platform', within the Lawyer's Profile.



Note: *This will need to be repeated for each Lender to which you wish to associate a trust account.*

You will be taken to your profile. Click on the Trust Account Information tab on the left to add, update or delete accounts.



Note: *If you edit/delete a trust account, the Lender may contact you to verify the information.*

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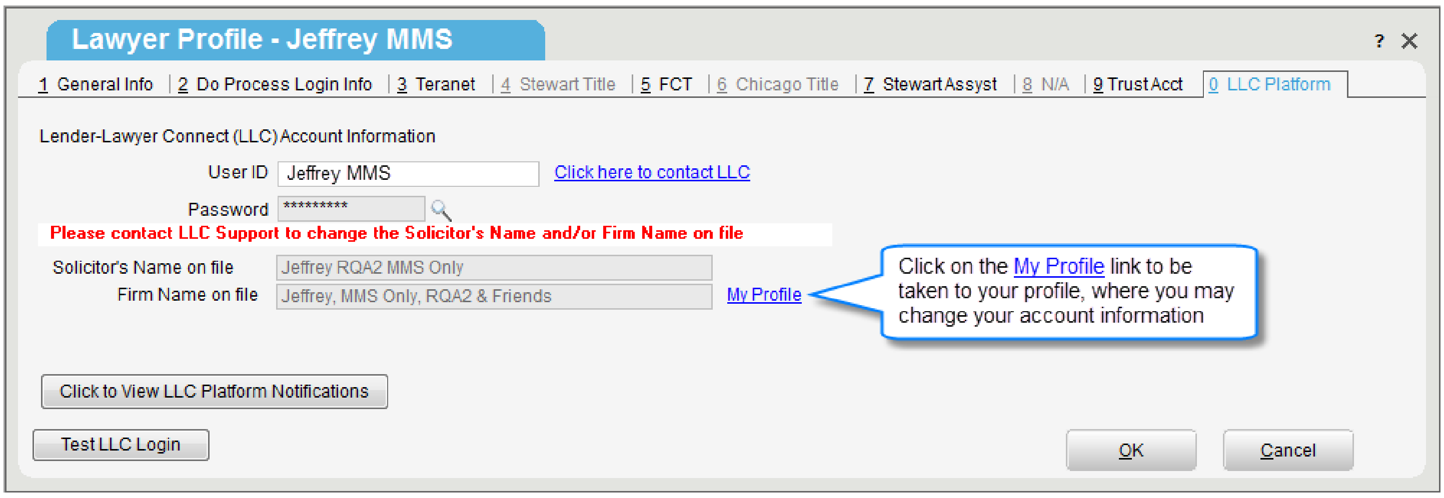
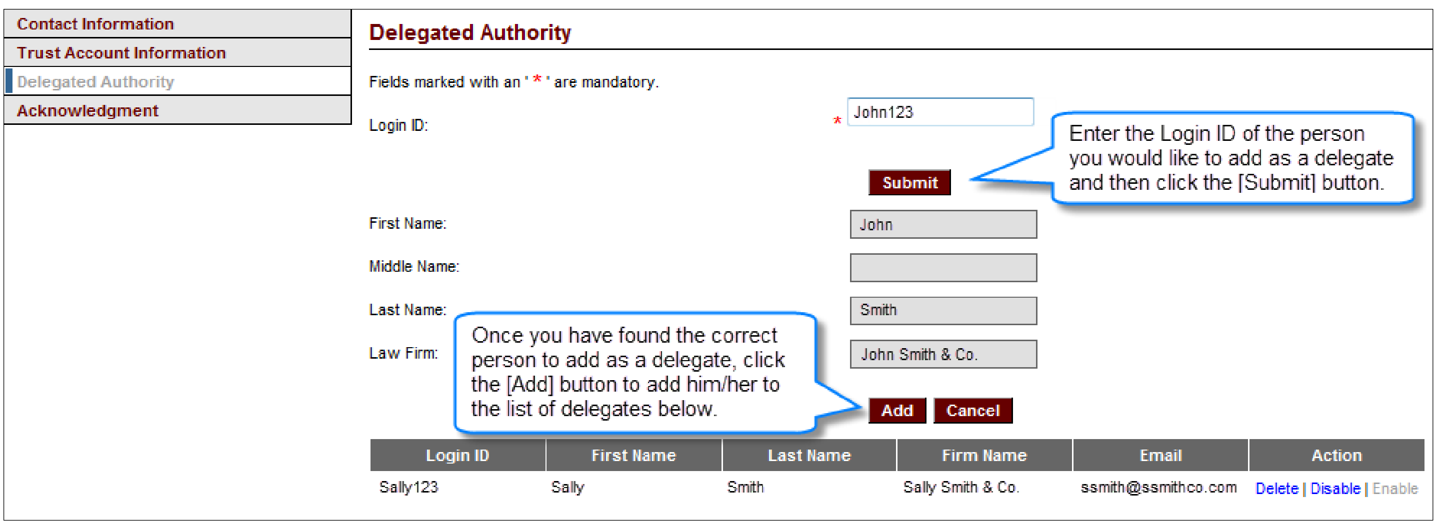
Step 5 – Setting up Email Notifications

To set up email notifications for Law Clerks/Legal Assistants select the My Profile link on Tab '0 LLC Platform', within the Lawyer's Profile.

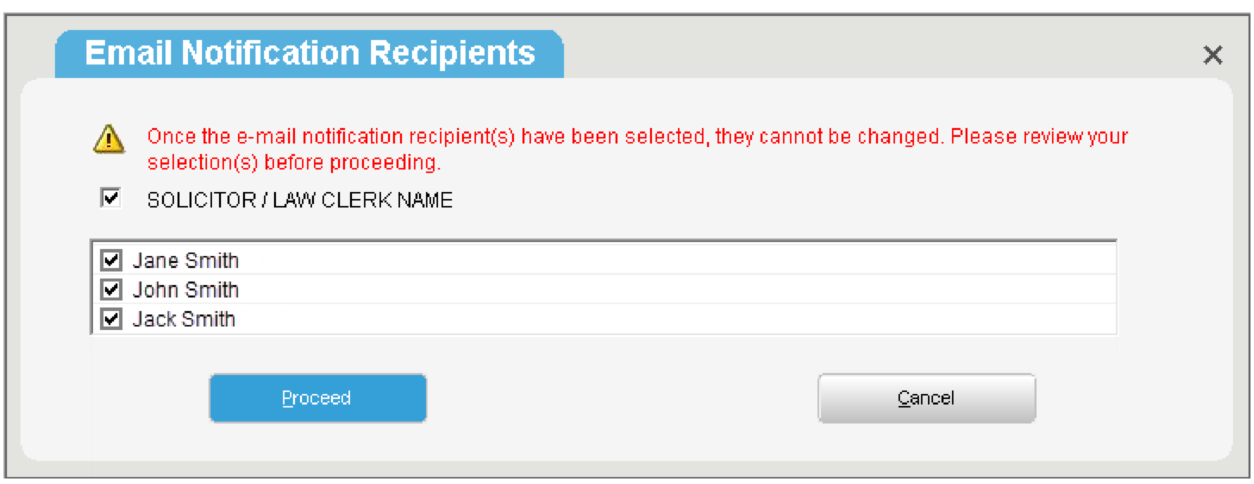


You will be taken to your profile. Click on the Delegated Authority tab on the left to add, delete, disable and enable your delegates.



Note: *To obtain delegate credentials, contact LLC Support at 1.877.929.0990 or LLCSupport@fct.ca*.

These delegates may then be associated to an MMS Transaction during the assign-deal process on a deal-by-deal basis.

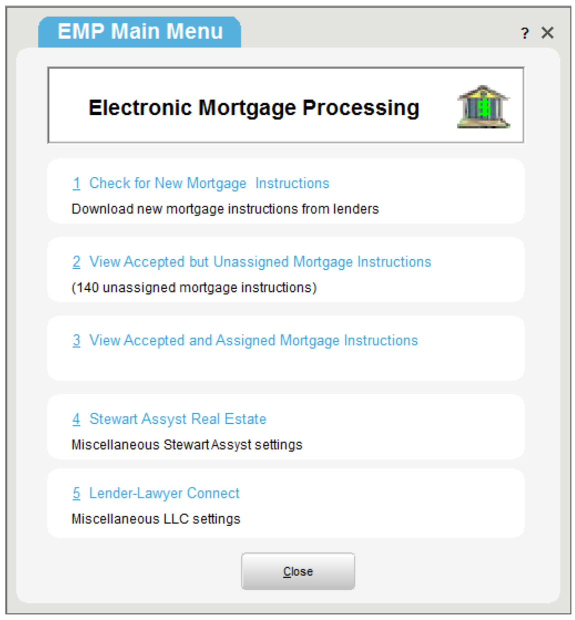


Whoever you assign as an Email Notification Recipient for a deal, he/she will receive the following emails for the corresponding deal:

- New Deal
- Deal Cancelled
- Amendment(s) to Deal
- New Deal Follow-up
- Post a Note (if applicable to lender)
- Actionable Notes (if applicable to lender)
- Follow-up for Final Report Notice
- Request for Funds Declined
- Deal Reactivated
- Request for Funds Follow-up

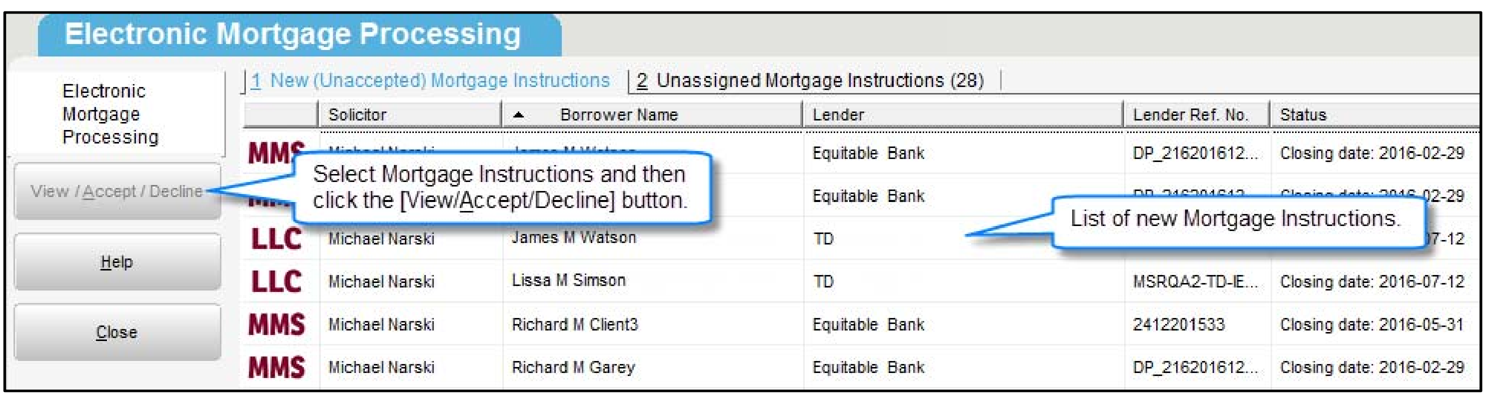
Step 6 – Accept or Decline New Mortgage Instructions

Select Electronic Mortgage Processing (EMP) from the 'Go To' menu to retrieve all new mortgage instructions sent from a lender.



✐ Note: *An email notification will be sent to you when a new set of mortgage instructions have been sent to you by a lender. If you have not accepted the deal and the closing date is less than seven days away, you will receive an email notification reminding you to accept or decline the deal every day until the day before closing.*

To accept a new deal click '1 Check for New Mortgage Instructions' from the EMP Main Menu. Click on the [**View/Accept/Decline**] button to proceed with accepting or declining a transaction.

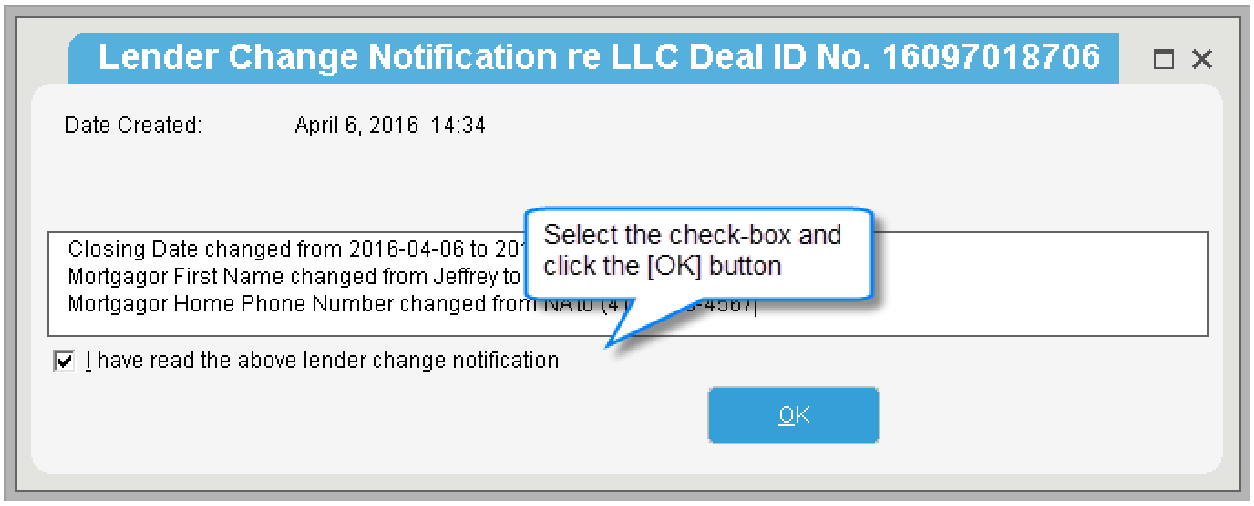


✐ Note: *When accepting a transaction, you can assign to an existing record or create a new record.*

Step 7 – Amendments

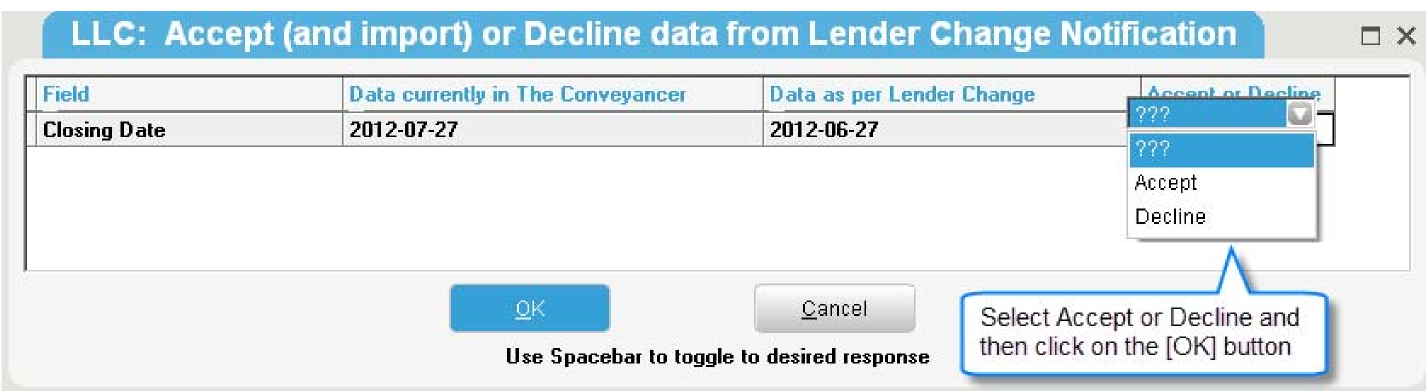
There are three types of LLC amendments: Lender Field Amendments, Shared Field Amendments and Lawyer field amendments.

To view the details of lender amendments, click [**Update Data**] located within Tab G and the 'Lender Change Notification' window will be displayed. Select the 'I have read the above lender change notification' checkbox and click [**OK**] to proceed.



✎ Note: *When a Lender sends an amendment or a new note on a deal, you will receive an email notification.*

If the amendment was made to a shared field (both the Lawyer and Lender can update it), you will need to indicate whether you accept or decline the amendment.



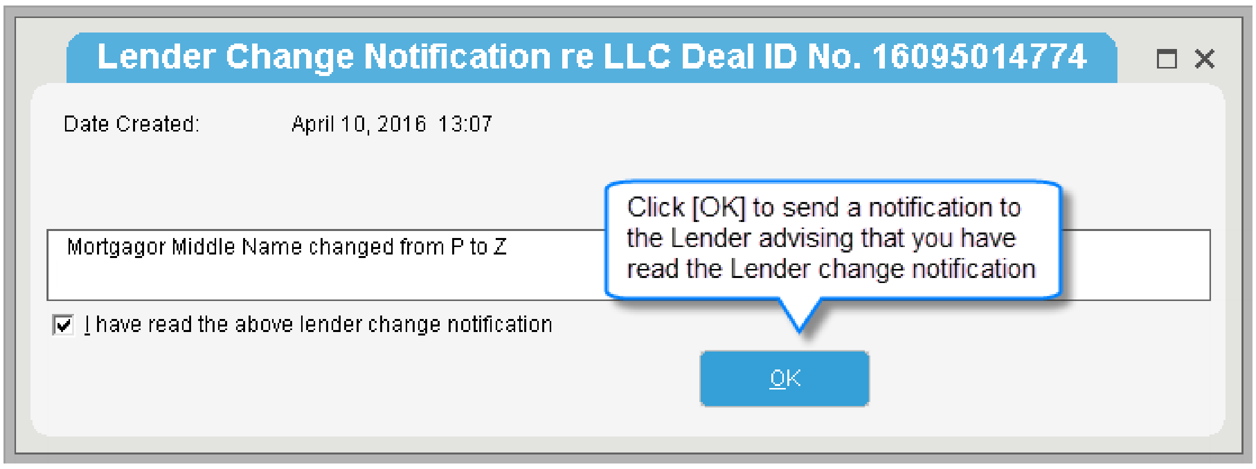
✎ Note: *Some Lenders prefer to be contacted by phone if you decline the amendment; a message will be displayed to you if this applies to the Lender on your deal.*

Accepting Amendments to Mortgagor Name

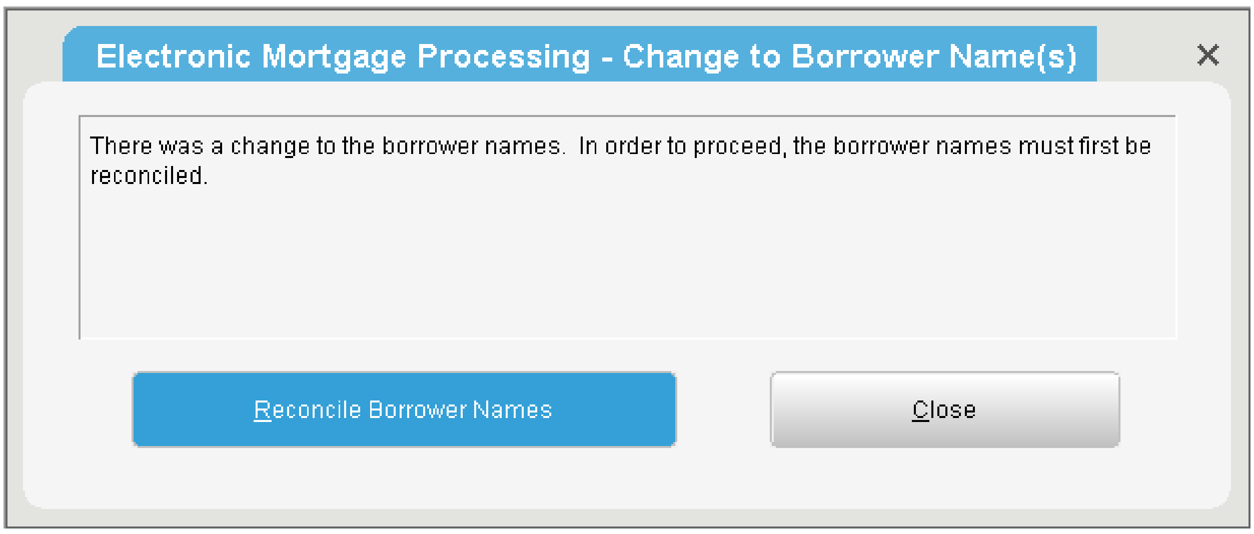
1) To view the details of the Mortgagor Name amendment, go to Tab G and click on [**Update Data**].

2) The Lender Change Notification pop-up window will appear and lists the Mortgagor Name change sent by the Lender.

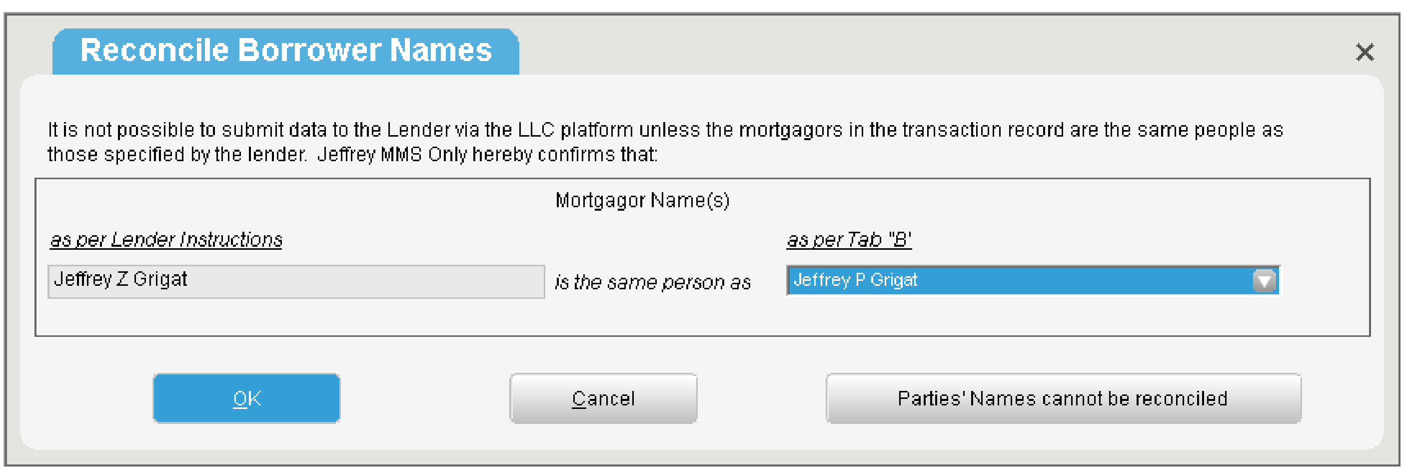
3) Acknowledge the Lender change(s) and click on [**OK**].



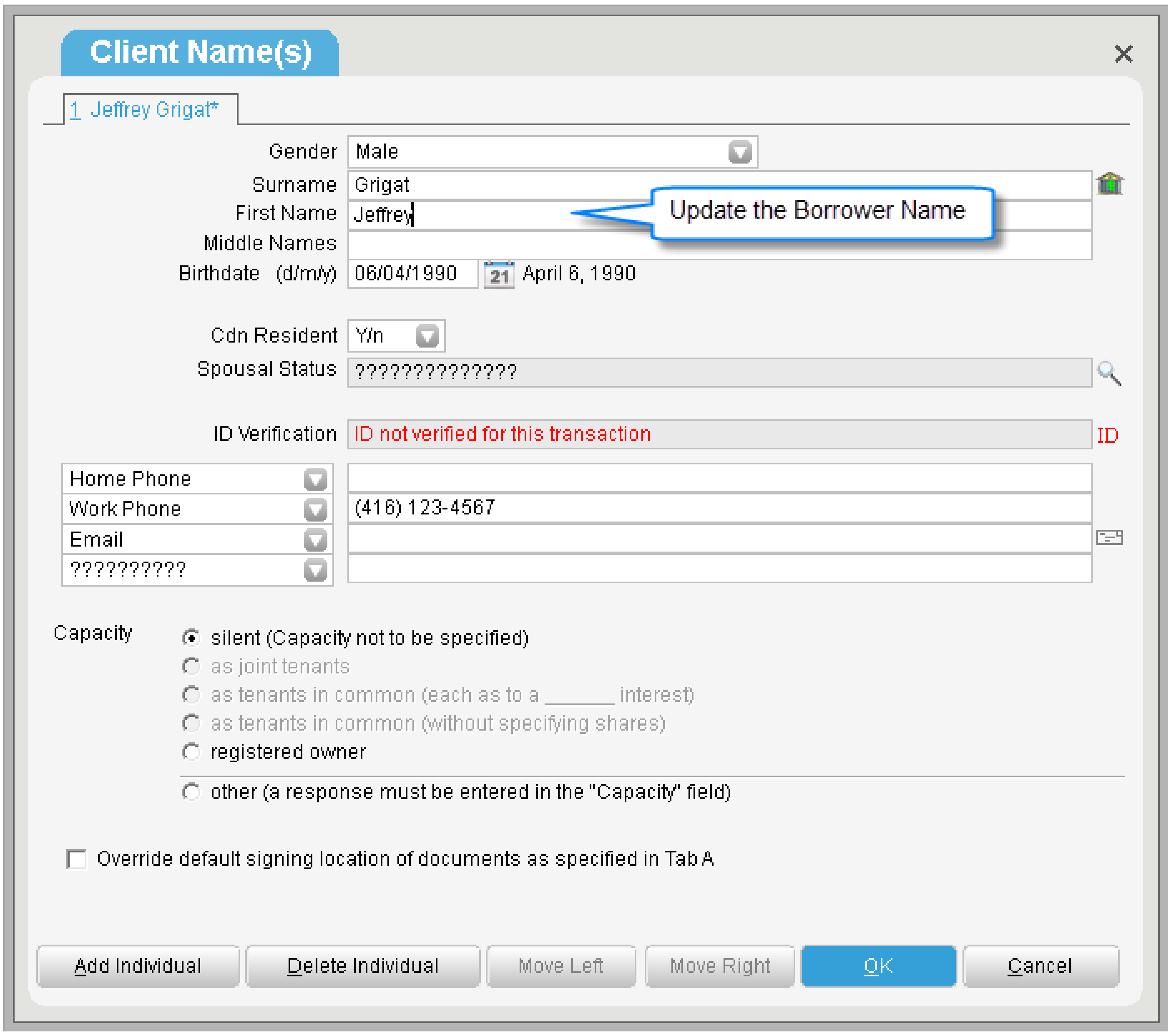
4) To accept the lender's changes, click [**Reconcile Borrower Names**] from the Change to Borrower Name(s) screen.



5) Reconcile the Borrower's name.

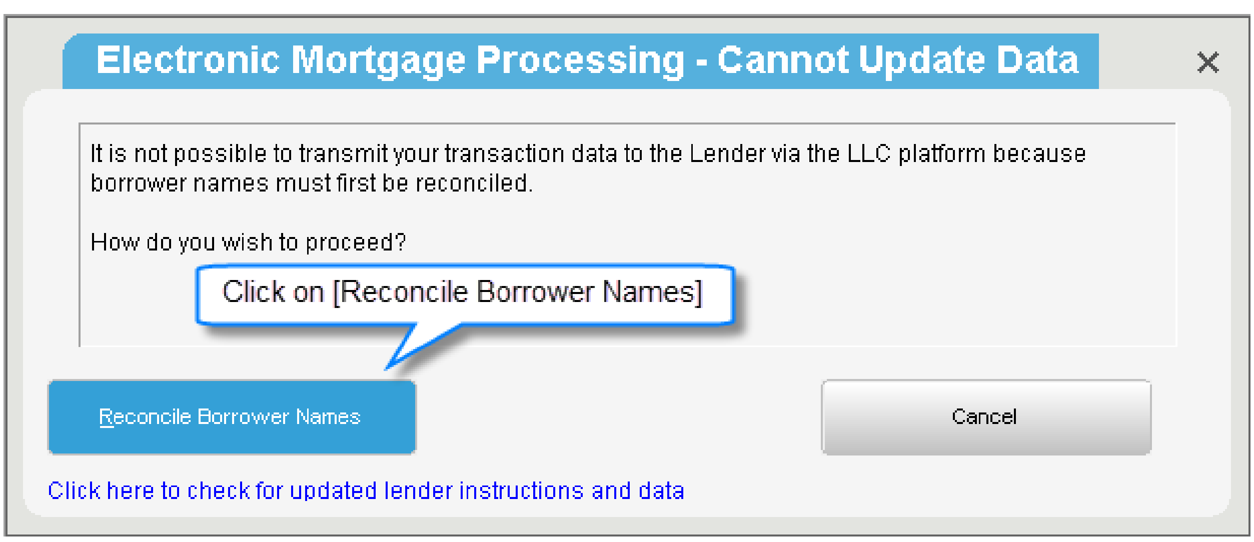


6) Proceed to update the Mortgagor Name within the Purchaser field in Tab B with the changes sent by the Lender.



7) Once the Mortgagor Name has been updated and the changes saved, proceed to notify the lender that you have reconciled your data by clicking on the [**Update Data**] button located within Tab G.

8) Select the [**Reconcile Borrower Names**] button to proceed.



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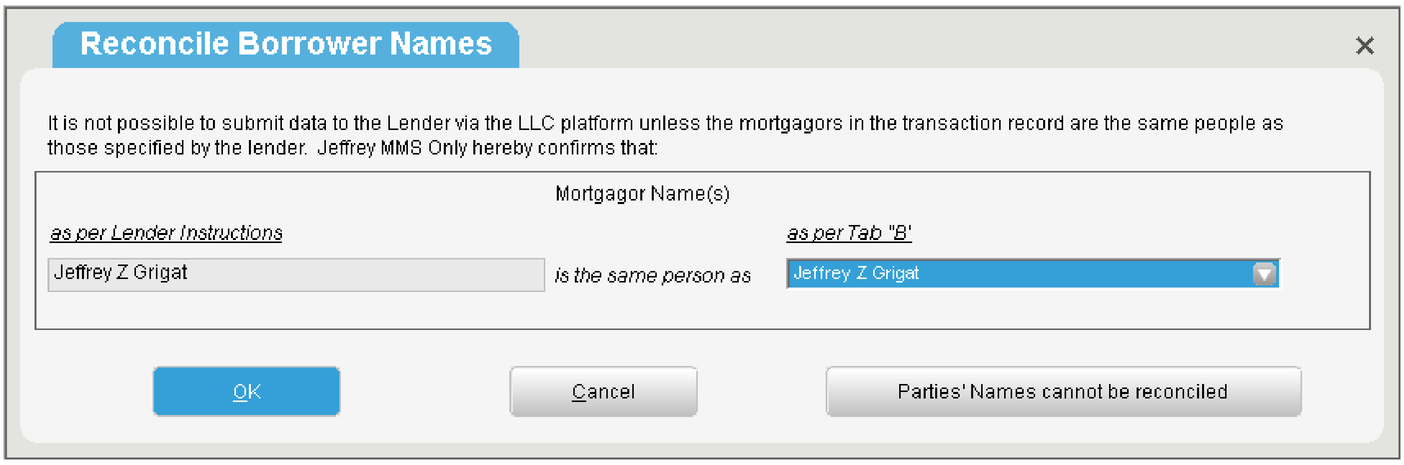
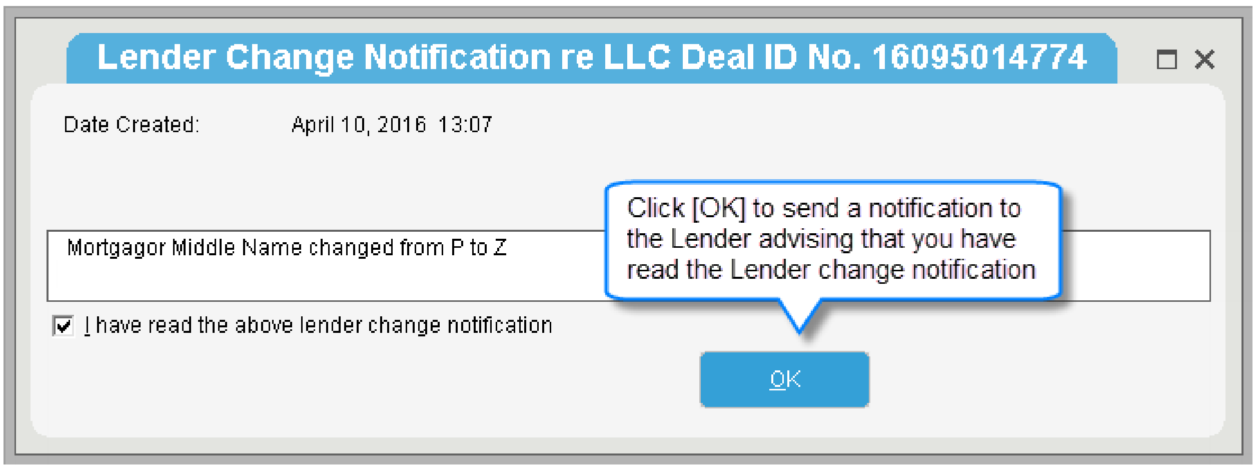
9) Click on the Mortgagor Name from the dropdown menu and select [**OK**] to proceed.



10) Acknowledge the Lender change(s) and click [**OK**]. Upon selecting [**OK**], a notification will be sent to the lender advising that you have accepted the change.

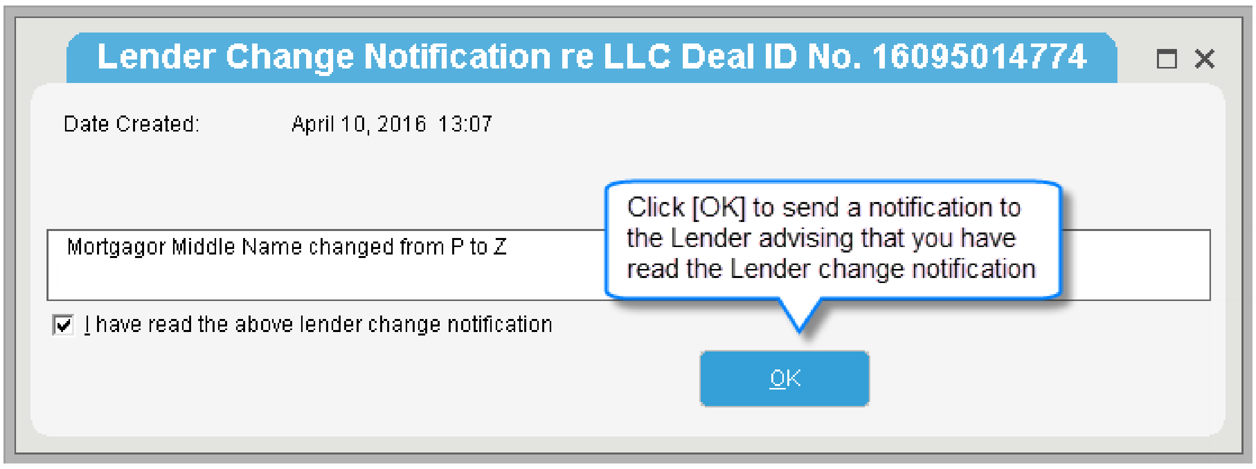


Declining Amendments to Mortgagor Name

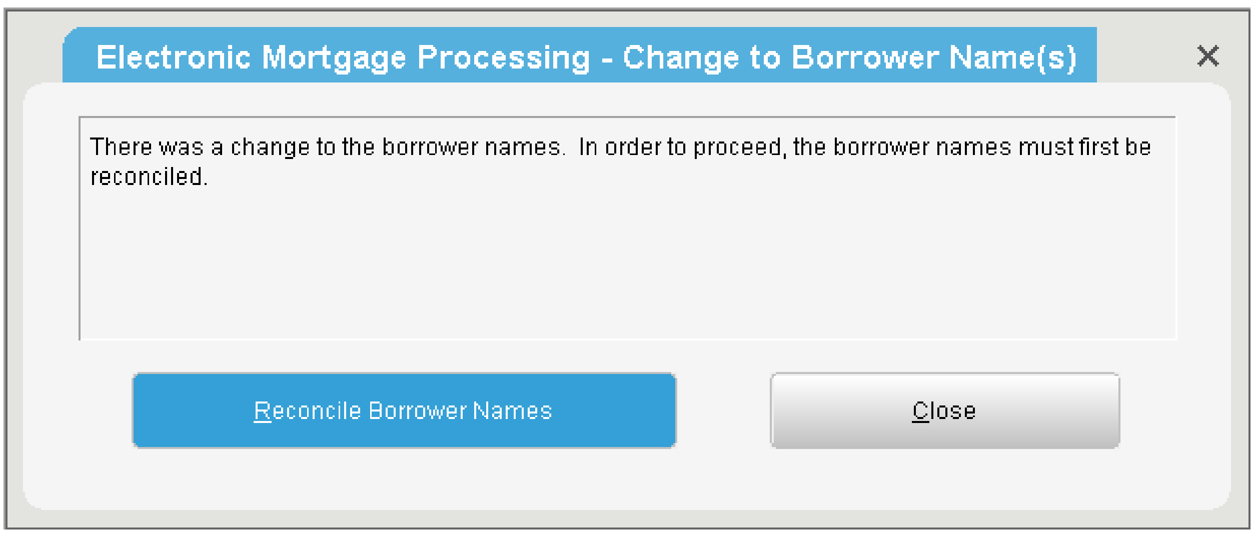
1) To view the details of the Mortgagor Name amendment, go to Tab G and click on [**Update Data**].

2) The Lender Change Notification pop-up window will appear and lists the Mortgagor Name change sent by the Lender.

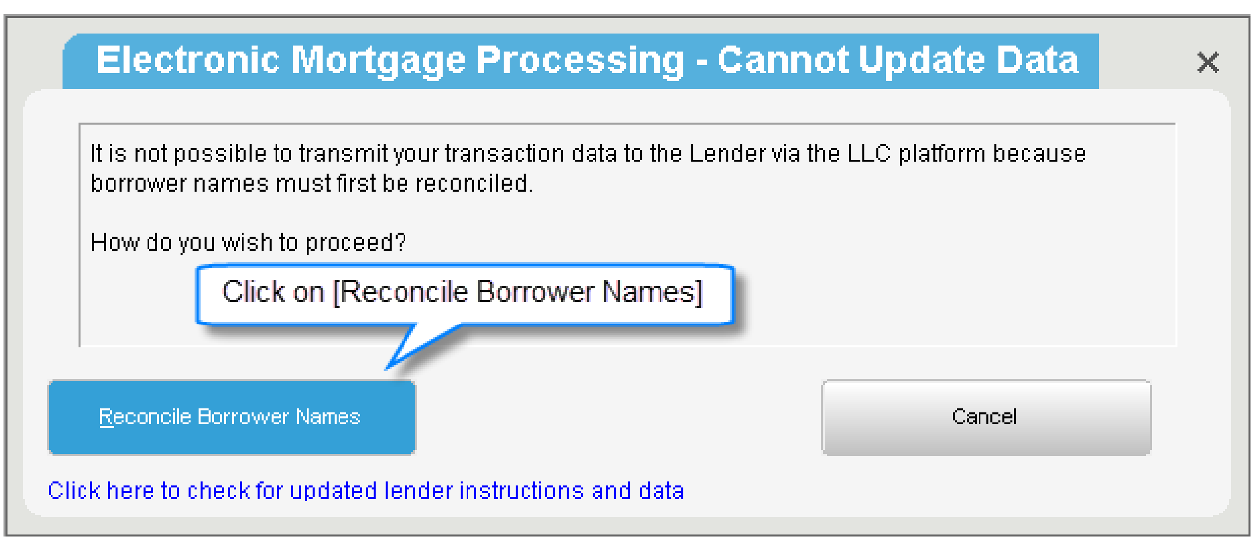
3) Acknowledge the Lender change(s) and click on [**OK**].



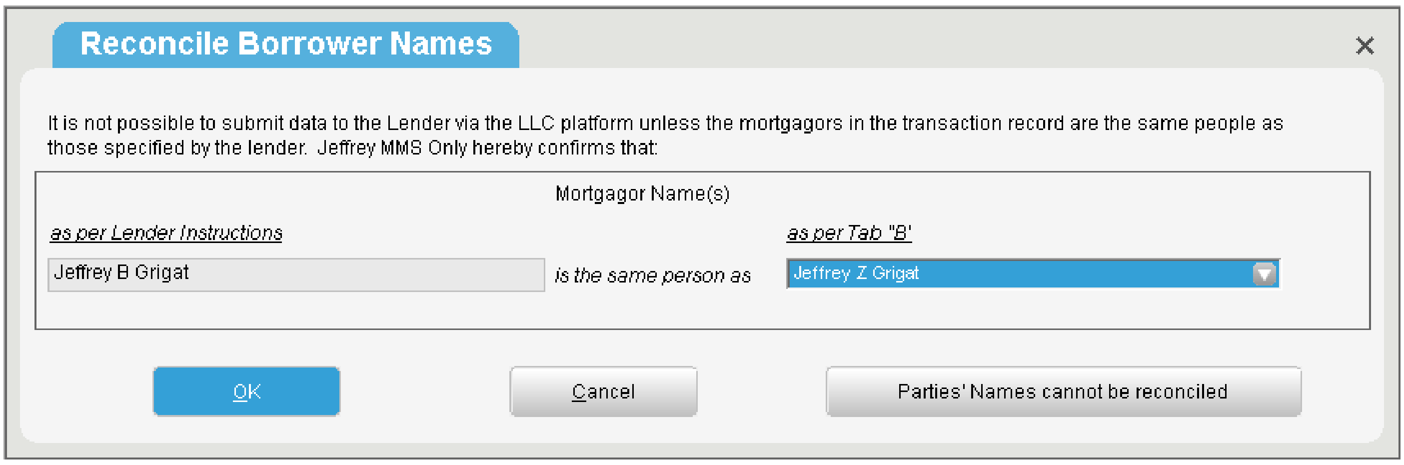
4) To decline the lender's changes, click [**Close**] from the Change to Borrower Name(s) screen.



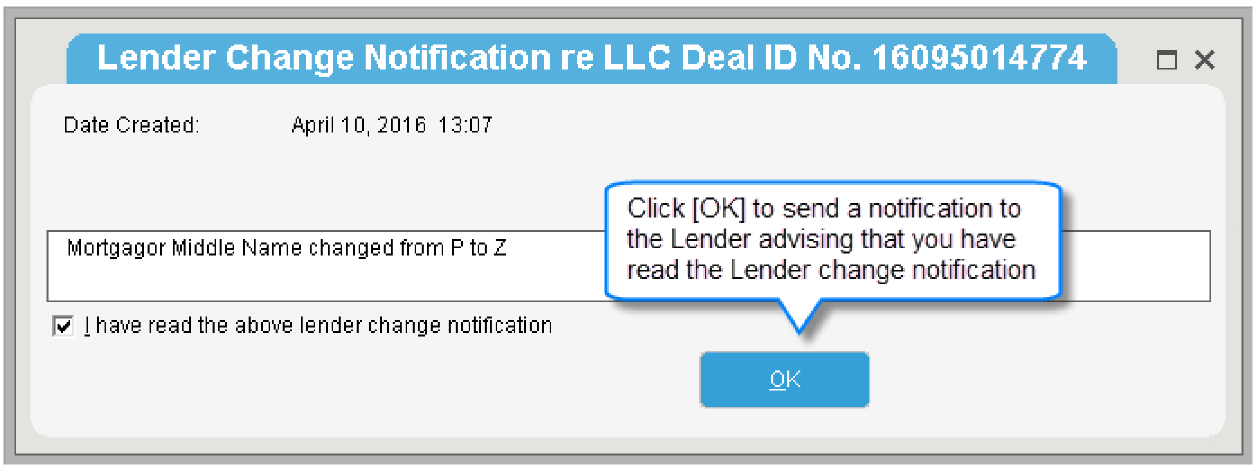
5) Without amending any data in the deal, select [Update Data] button located within Tab G. Select the [Reconcile Borrower Names] button to proceed.



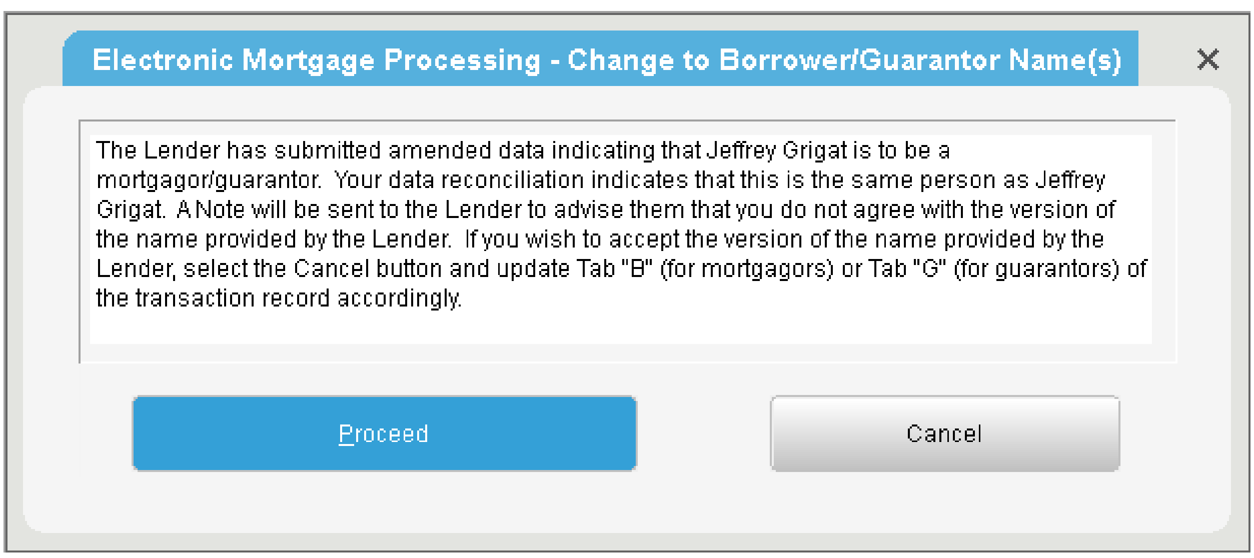
6) Click on the Mortgagor Name from the dropdown menu and select [**OK**] to proceed.



7) Acknowledge the Lender Change Notification and click [**OK**].



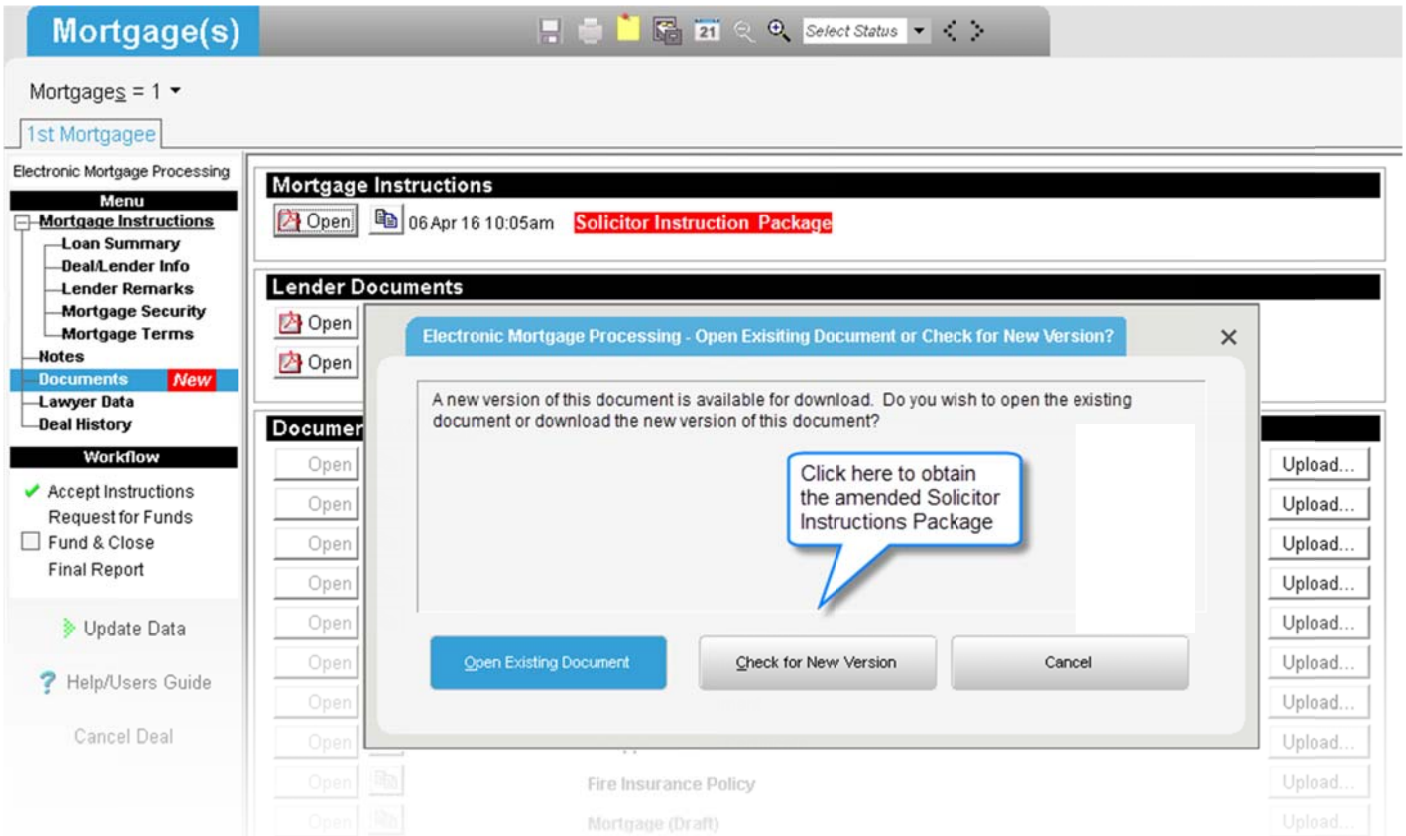
8) You will be presented with a message indicating that you do not agree with the version of the name provided by the Lender. Click [**Proceed**].



✐ Note: *A notification will be sent to the Lender advising that you have declined the change. Some Lenders prefer to be contacted by phone if you decline the changes; a message will be displayed if this applies to the Lender on your deal.*

Updated Solicitor Instruction Package

To view the amended Solicitor Instruction package, click the [**Open**] option for the Solicitor Instruction Package and choose the [**Download New Version**] option.



✐Note: *The [**Download New Version**] option will overwrite the previous version.*

Step 8 – Notifying the Lender of Changes

You are able to make amendments to any of the Shared fields or Lawyer fields.

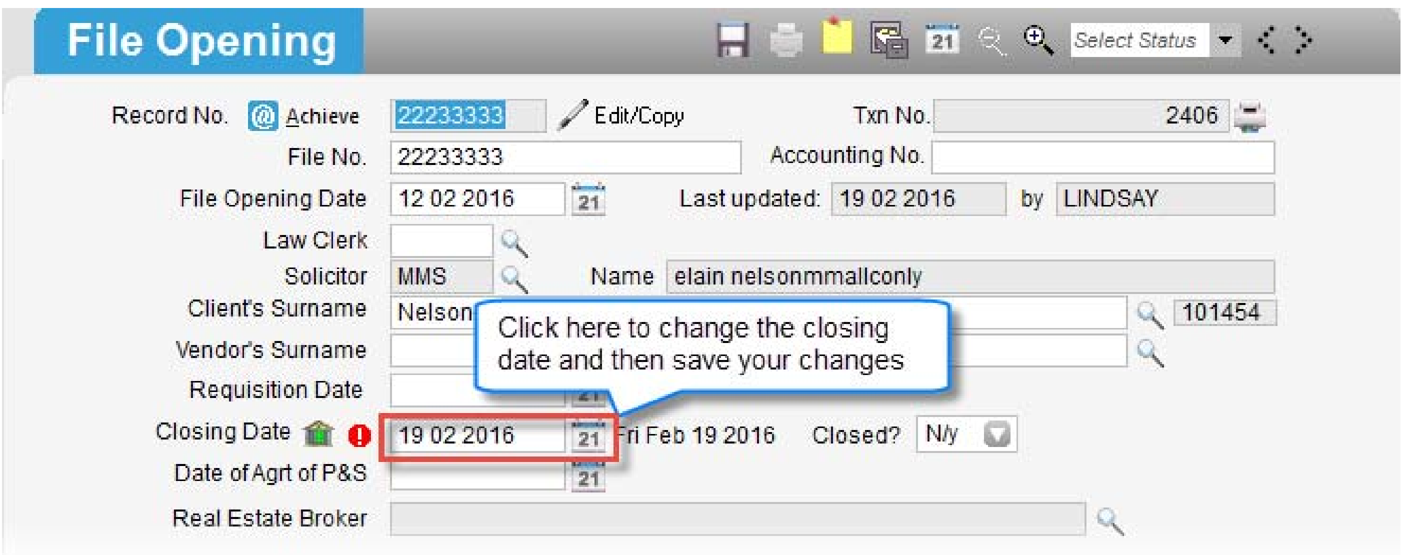
Key Shared Fields include:

- Closing Date (Tab A)
- Purchaser (Mortgagor/Borrower) (Tab B)
- Property Address (Tab D)
- Guarantor (Tab G)

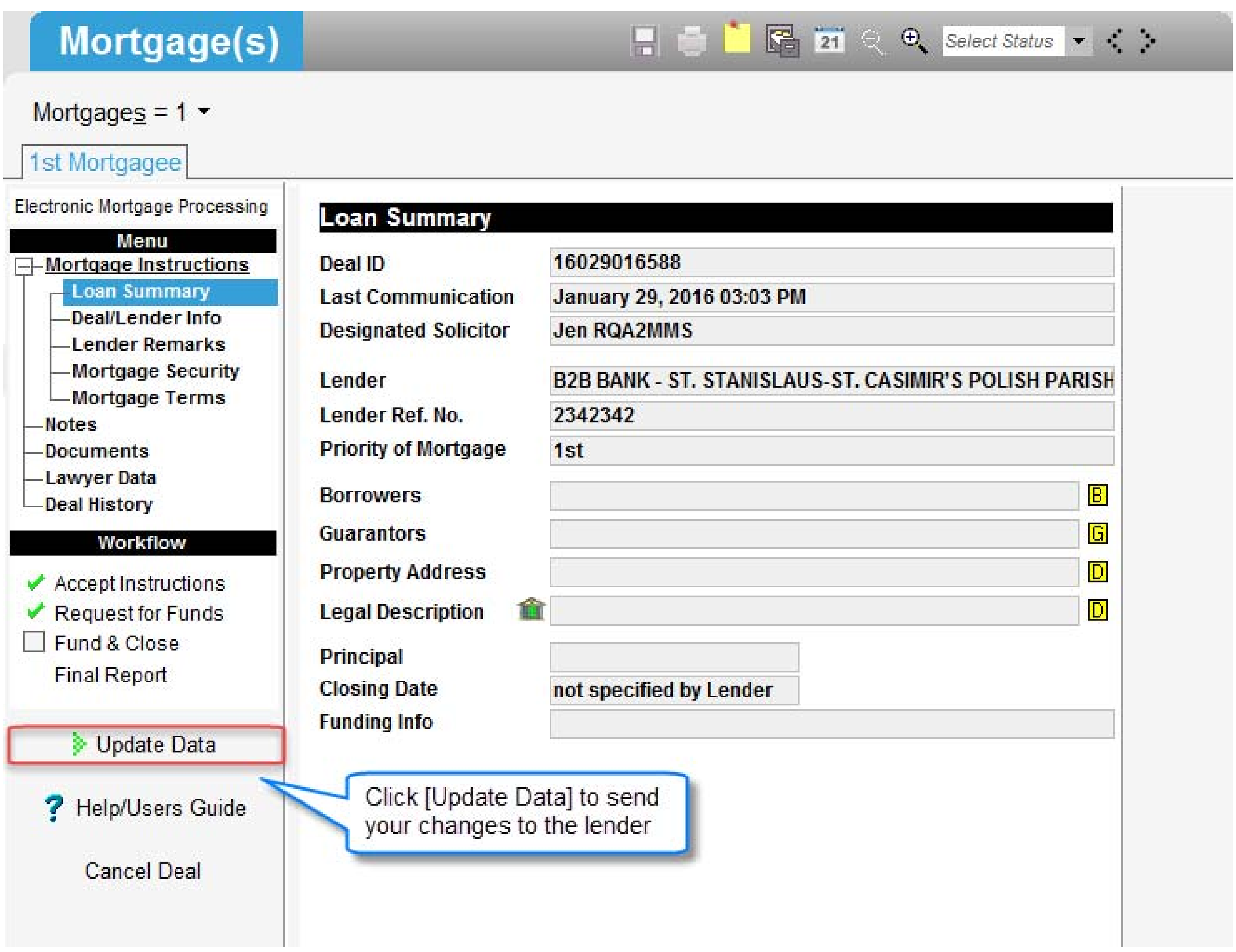
Lawyer fields are fields that only a Lawyer can update, such as fire insurance details.

Amendment Example – Closing Date

1) To notify the Lender of a change to Closing Date, update the applicable field directly within the application and then save your changes.



2) Navigate to **Tab G** and click [Update Data] to send the Lender your change:



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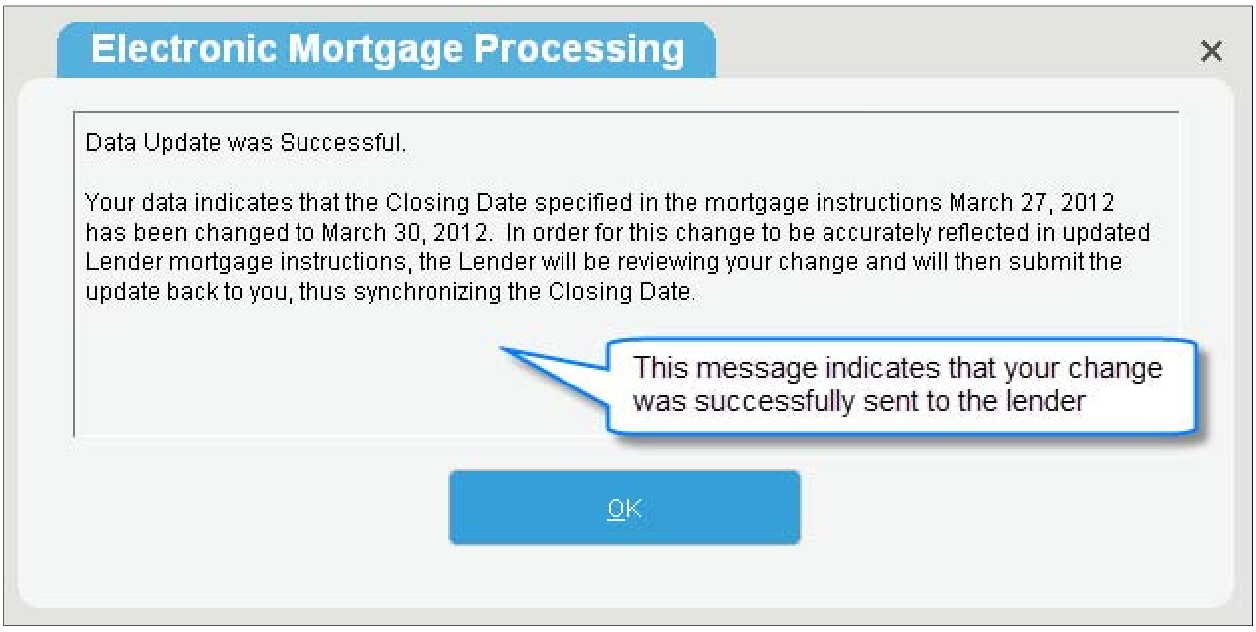
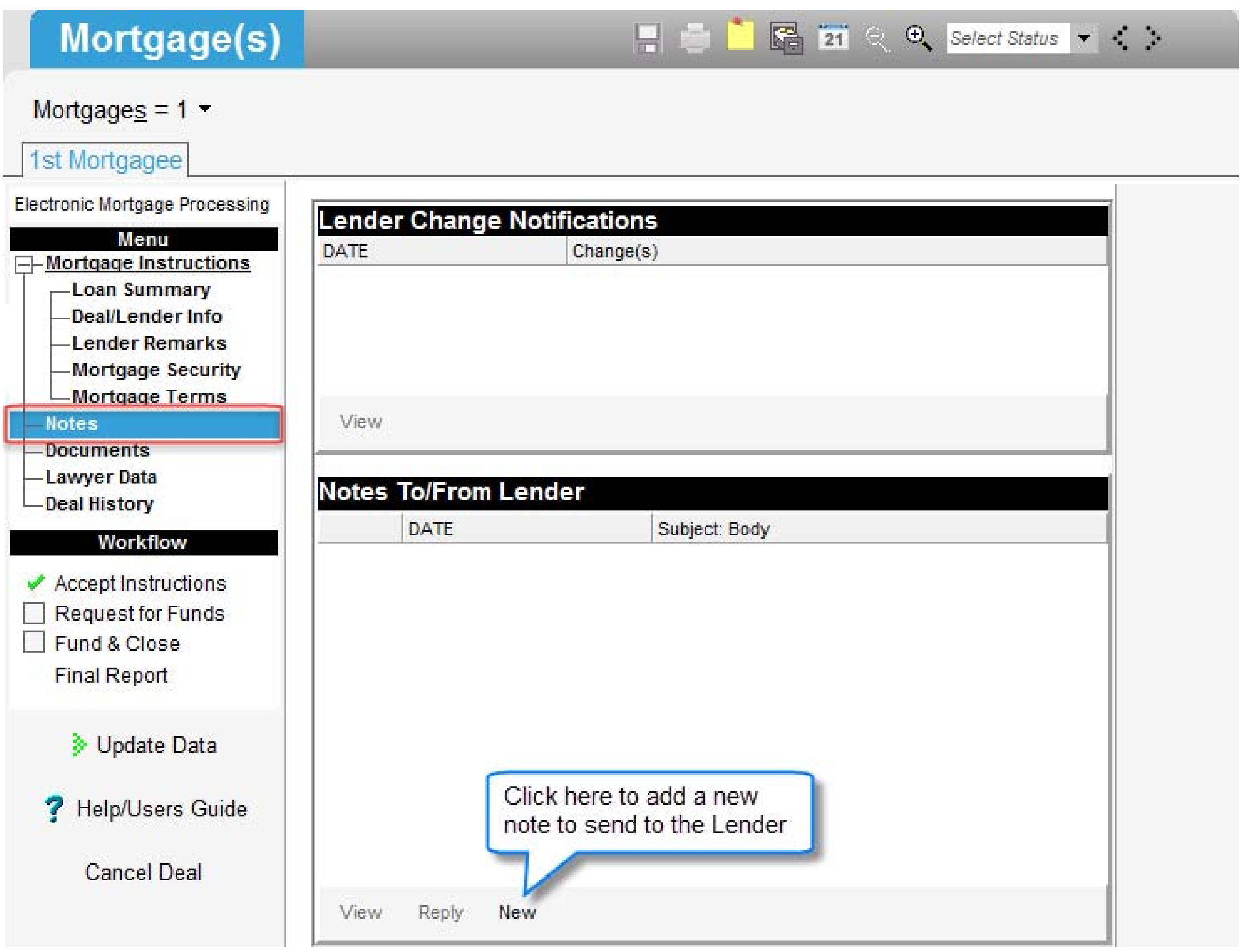
3. Once [**Update Data**] is successfully completed, the Lender is immediately notified of your change:



Step 9 – Sending Notes to a Lender (if applicable to the lender)

To add a new note to a deal, click the Notes link from the left navigation menu and then click [**New**].

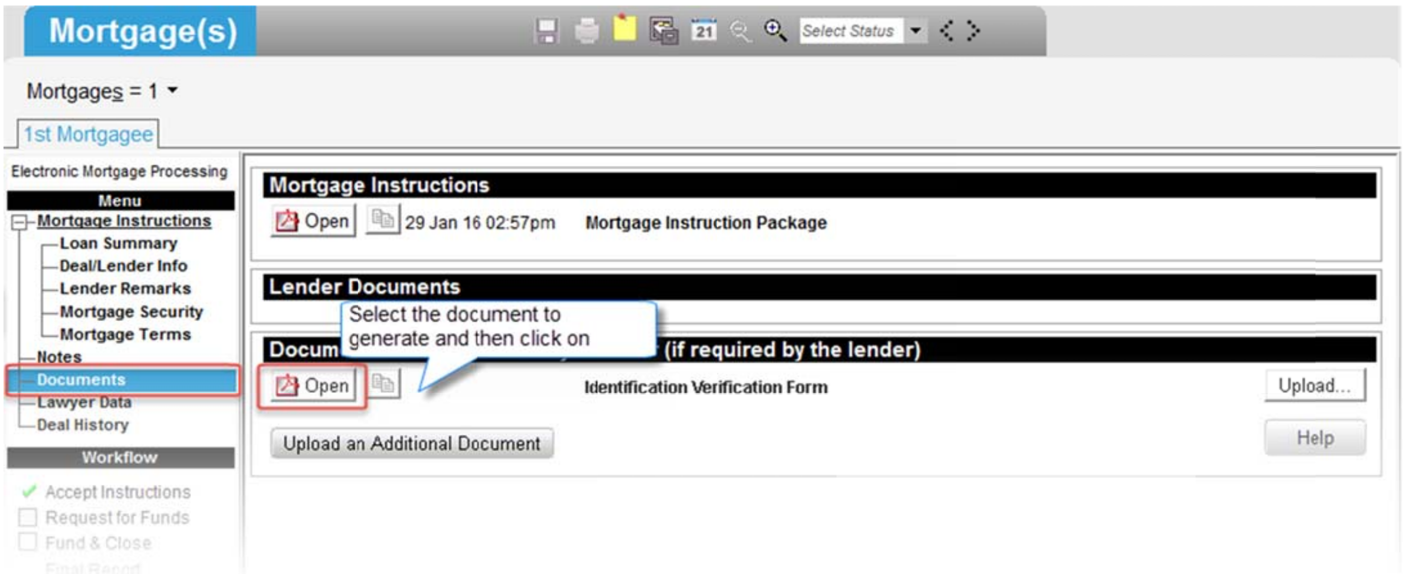
Enter the note details and select [**Send**]. Upon selecting [**Send**], the note, along with any applicable updated shared fields, will be sent to the lender.



Note: *Please note that some Lenders prefer to be contacted directly and do not have the notes capacity. A message will be displayed on the Notes screen if this applies to the Lender on your deal.*

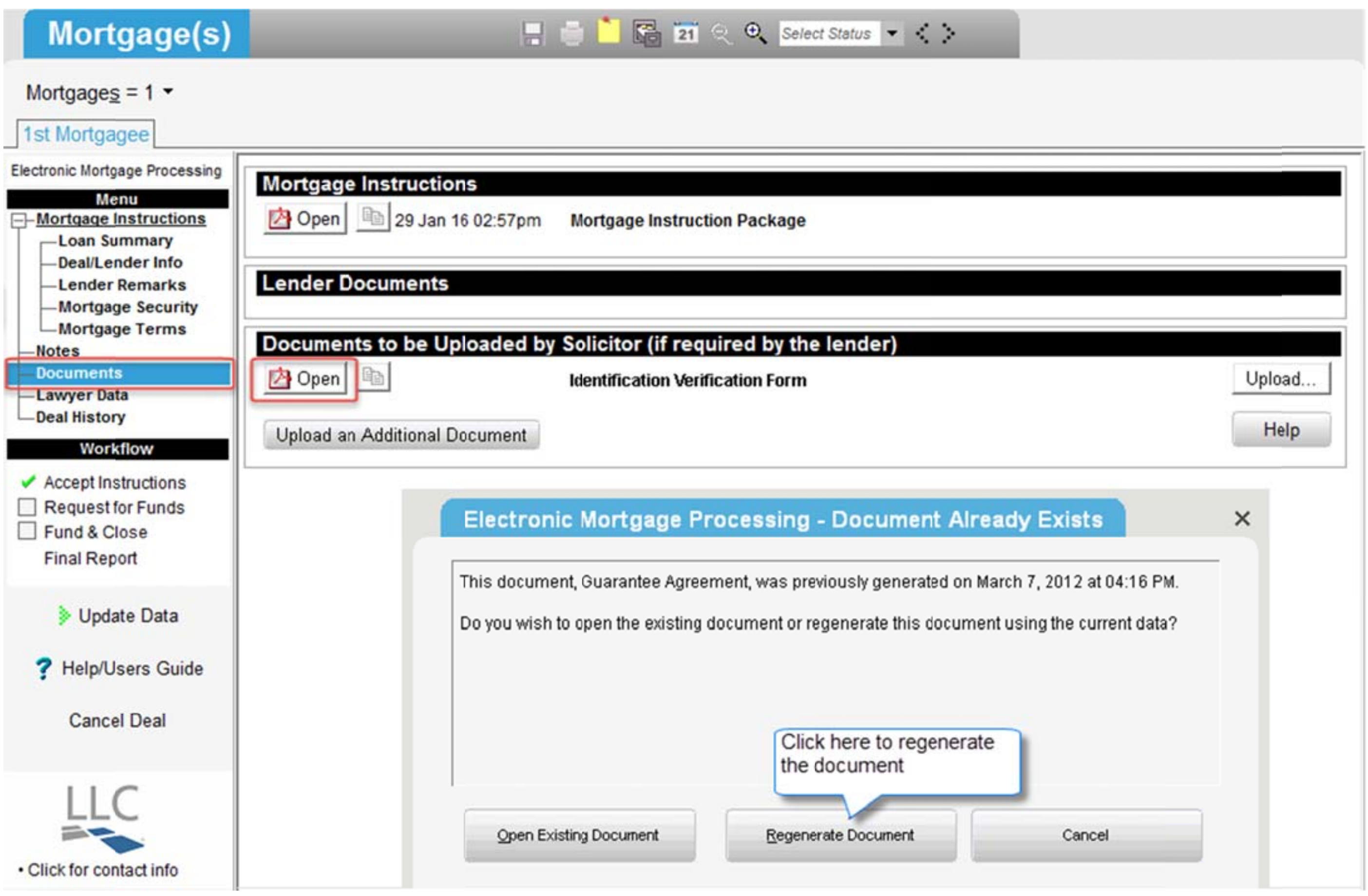
Step 10 – Generating and Downloading Documents

Prepopulated Lender documents are sent with each transaction and are found under the Documents link within Tab G.



✐Note: *Some documents require you to enter additional information. These editable fields will be highlighted in blue.*

Regenerating documents: if you update a deal, you will need to regenerate previously generated documents to capture the updated information. To regenerate a document, click on [**Open**] and then select [**Regenerate**] from the 'Document Already Exists' window. Review the information and change any editable fields, if applicable.



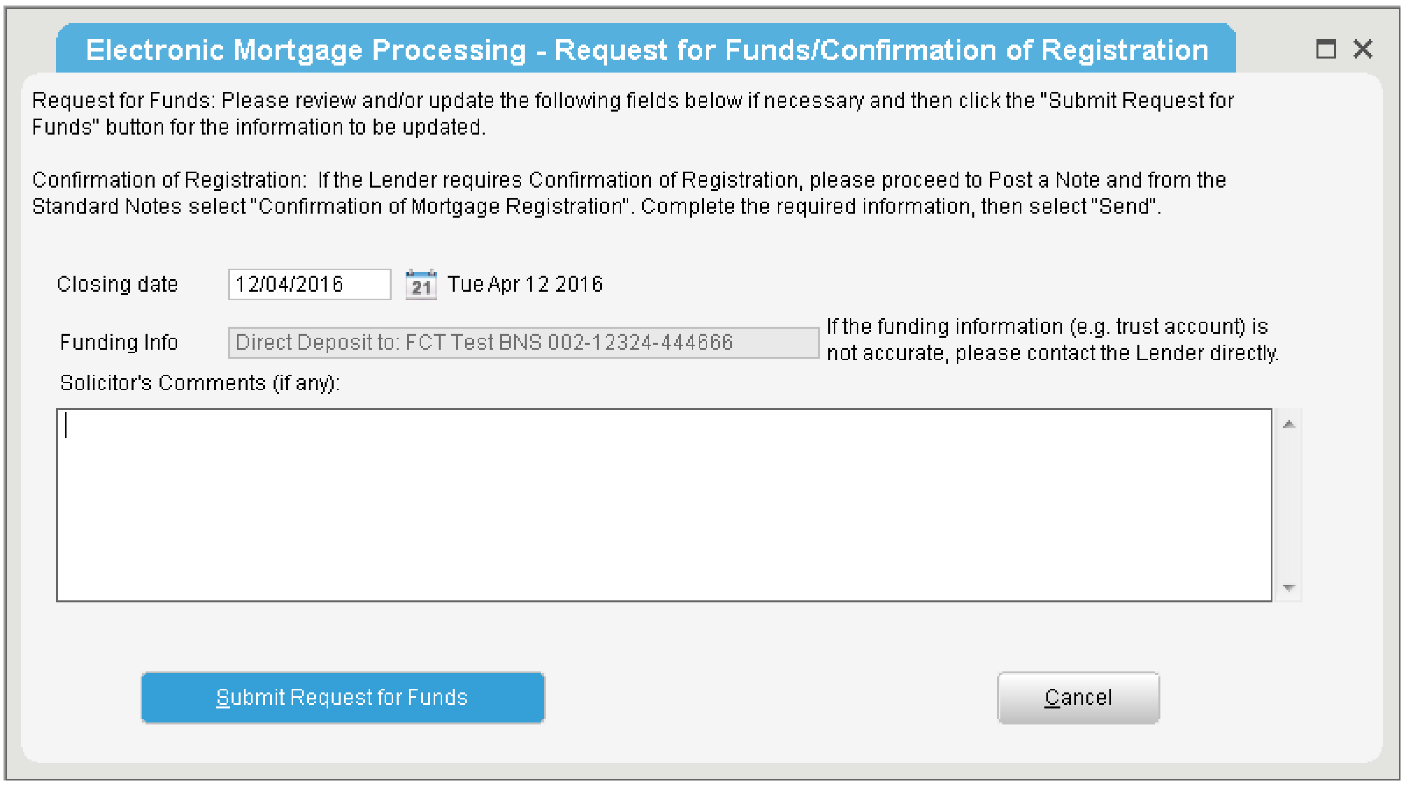
Step 11 – Submitting the Request for Funds (RFF)

Some Lenders require that a RFF document be submitted in order to request funds, while other Lenders will only require you to submit an electronic request without a document. Both methods are described below.

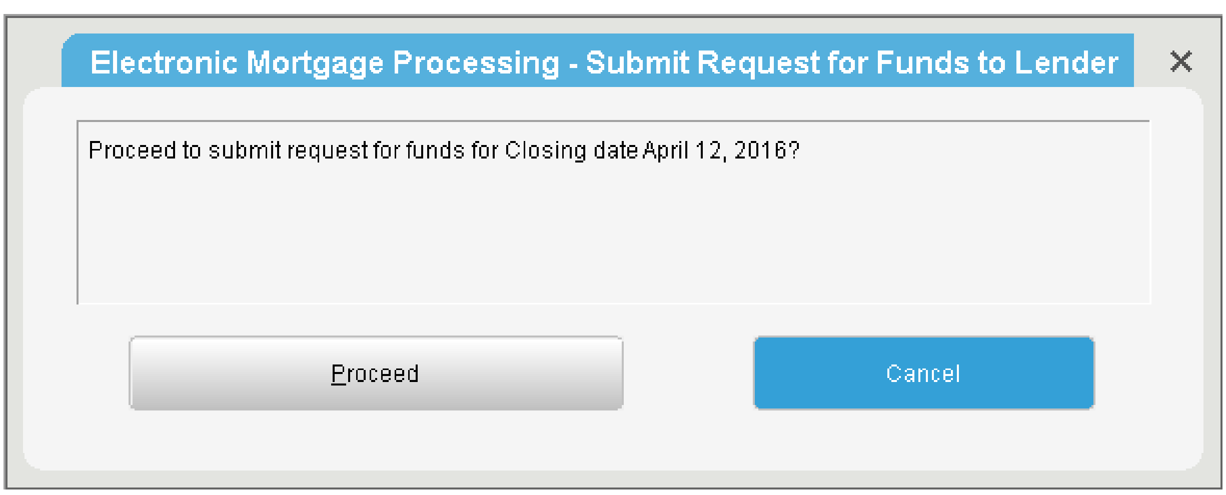
Submitting the RFF – For a Lender that does not require a RFF Document

When the lender sends you a new deal, they will indicate in the Solicitor Instructions whether or not you will be required to request funds. If the Request for Funds is not required for your deal, 'N/A' will display next to the link within **Tab G** and the Request for Funds screens will not be accessible.

To request funds, click the Request for Funds link from the left navigation menu located within **Tab G.**



Review the information displayed, and change if required. Enter comments, if necessary, and select the [Submit Request for Funds] button. You will be prompted to confirm that you wish to submit the request.



✎NOTE: *The Request for Funds can be submitted multiple times for a given deal.*

✎NOTE: *The Request for Funds screen may vary depending on what information is determined to be required to fund the deal.*

Submitting the RFF – For a Lender that requires a RFF Document

For Lenders that require a document to be submitted in order to request funds, follow the below steps:

Click the Request for Funds link from the left navigation menu located within Tab G

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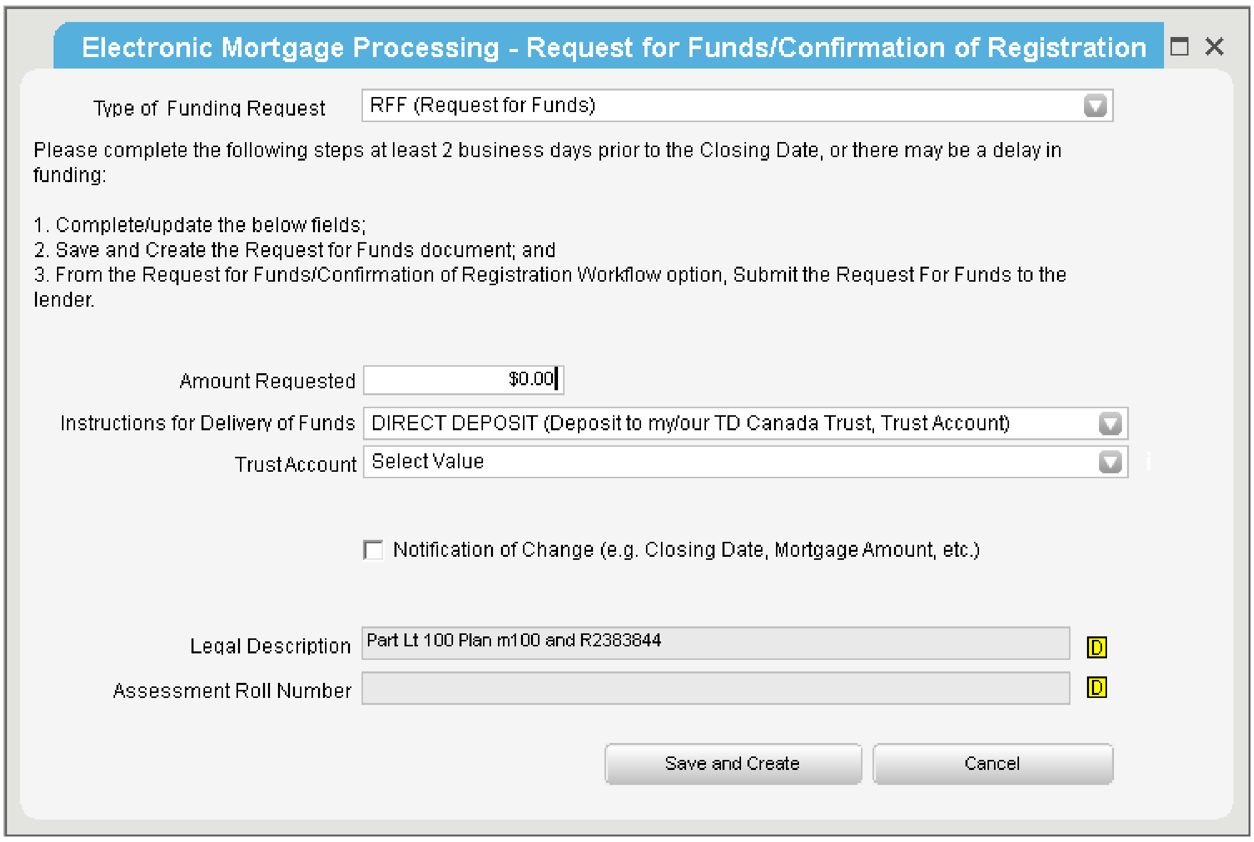
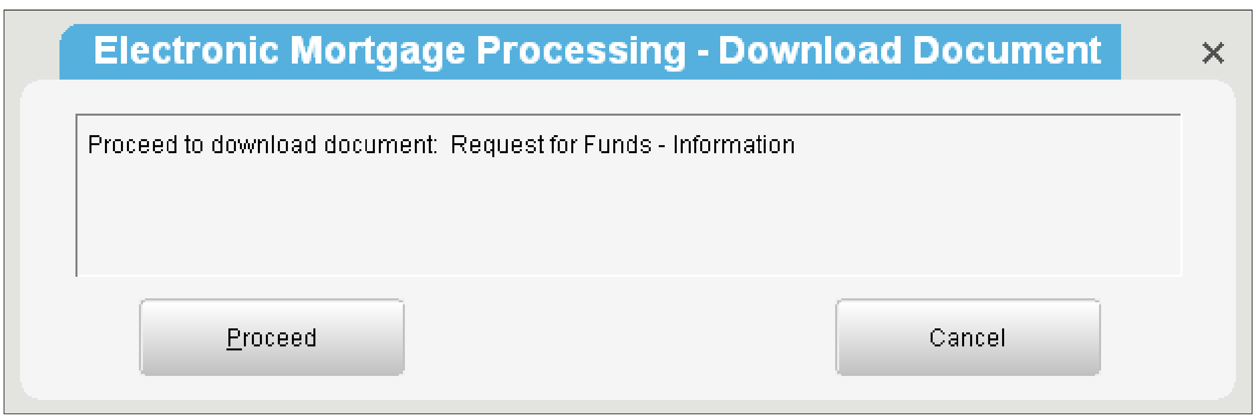
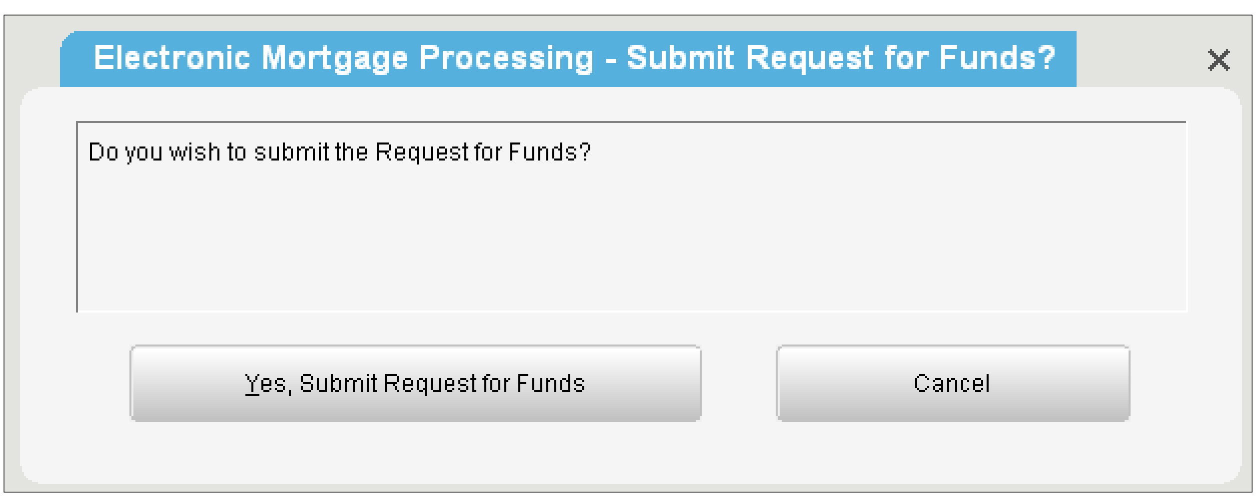


Complete all of the required information and click on the [**Save and Create**] button.

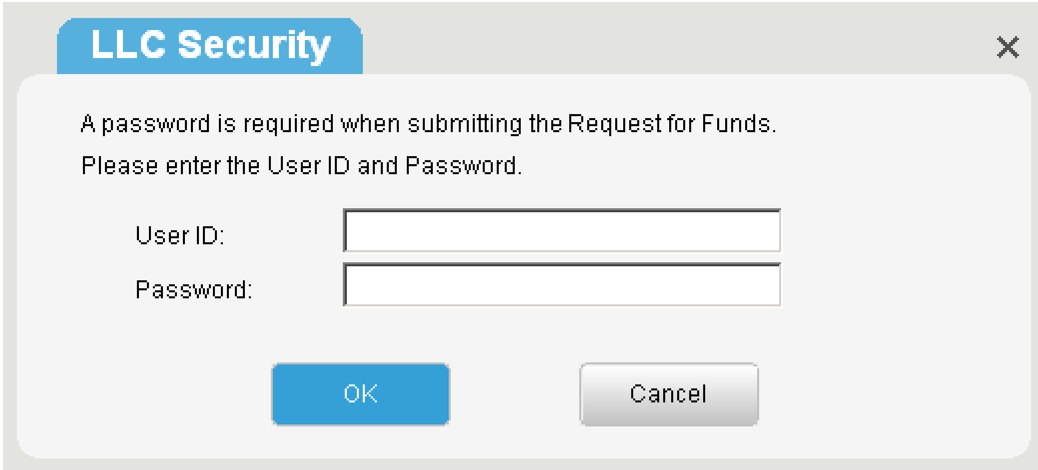


Click [**Proceed**] to generate the document; the document will be opened in a new window. Review the document and close it once you are done. A message will be displayed asking if you are ready to submit the request for funds to the Lender.

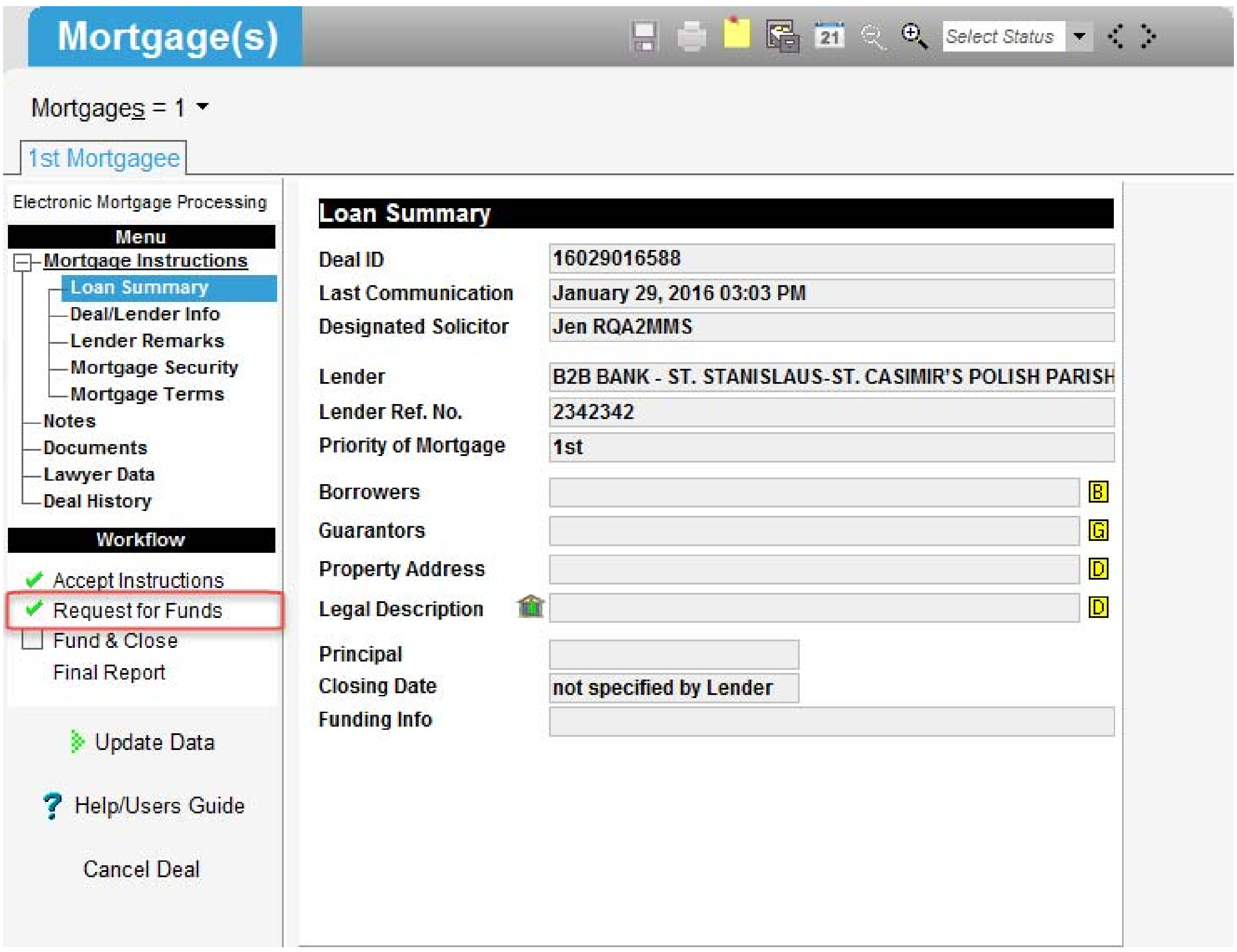


Click [**Yes, Submit Request for Funds**] to proceed.

Provide your password and click [**OK**]



Your request for funds will now be sent to the Lender and the Request for Funds workflow item will now be completed.

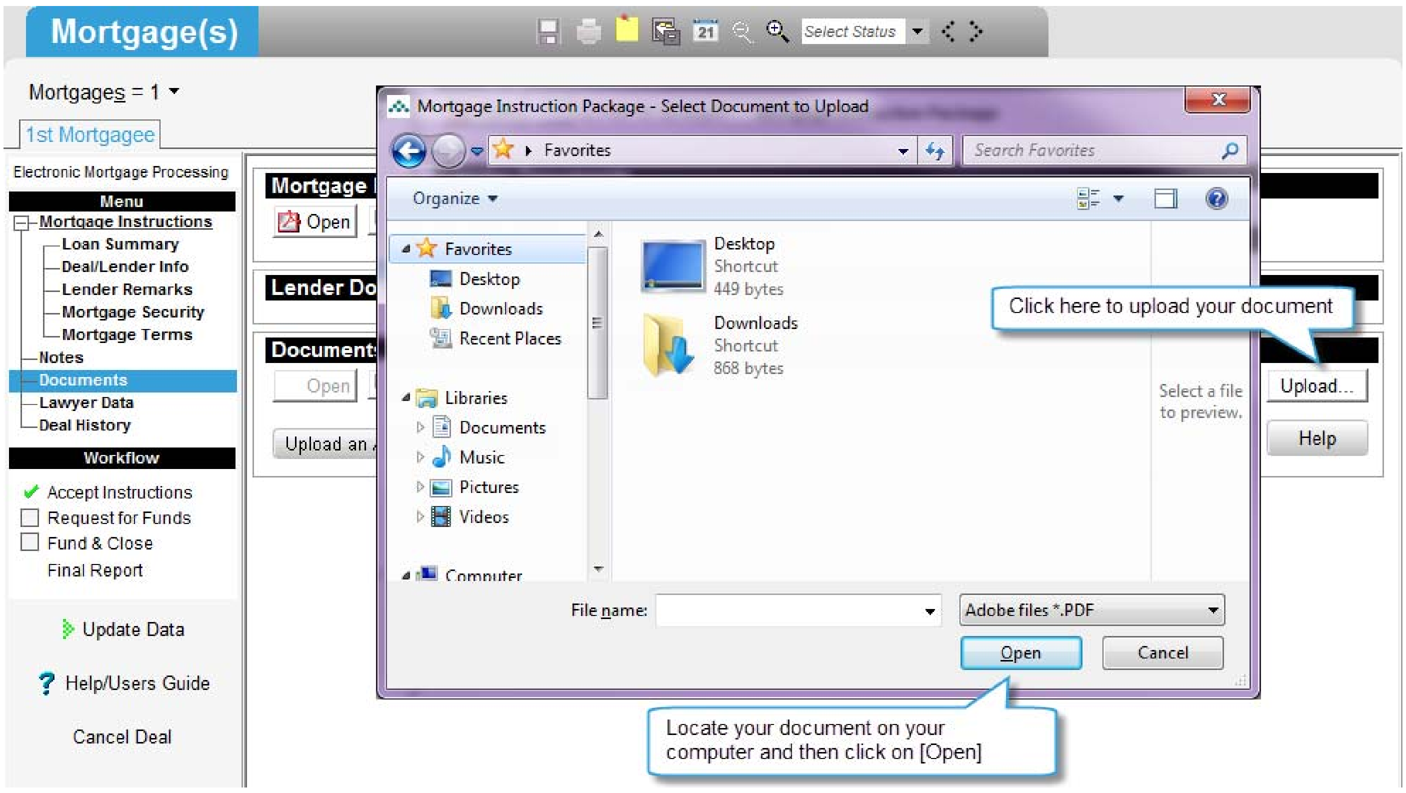


Step 12 – Scanning and Uploading Final Documents (if applicable to the Lender)

Some Lenders will require you to upload supporting documentation; please see the Solicitor Instructions for the documents the Lender requires.

To upload your final documents, scan your documents and save them within your computer. When in the Documents section, click [**Upload**] beside your document and click [**Browse**] to locate your file. Once you click on the [**Upload**] button, the document is immediately posted to the lender.

If the document list does not contain the document you need to upload, click on the [**Upload an Additional Document**] button, enter the document name and follow the above steps.



NOTE:

1. The lender will be notified that final reporting documents have been uploaded only when the Solicitor's/Notary's Report on Title has been submitted electronically (step 13 below).

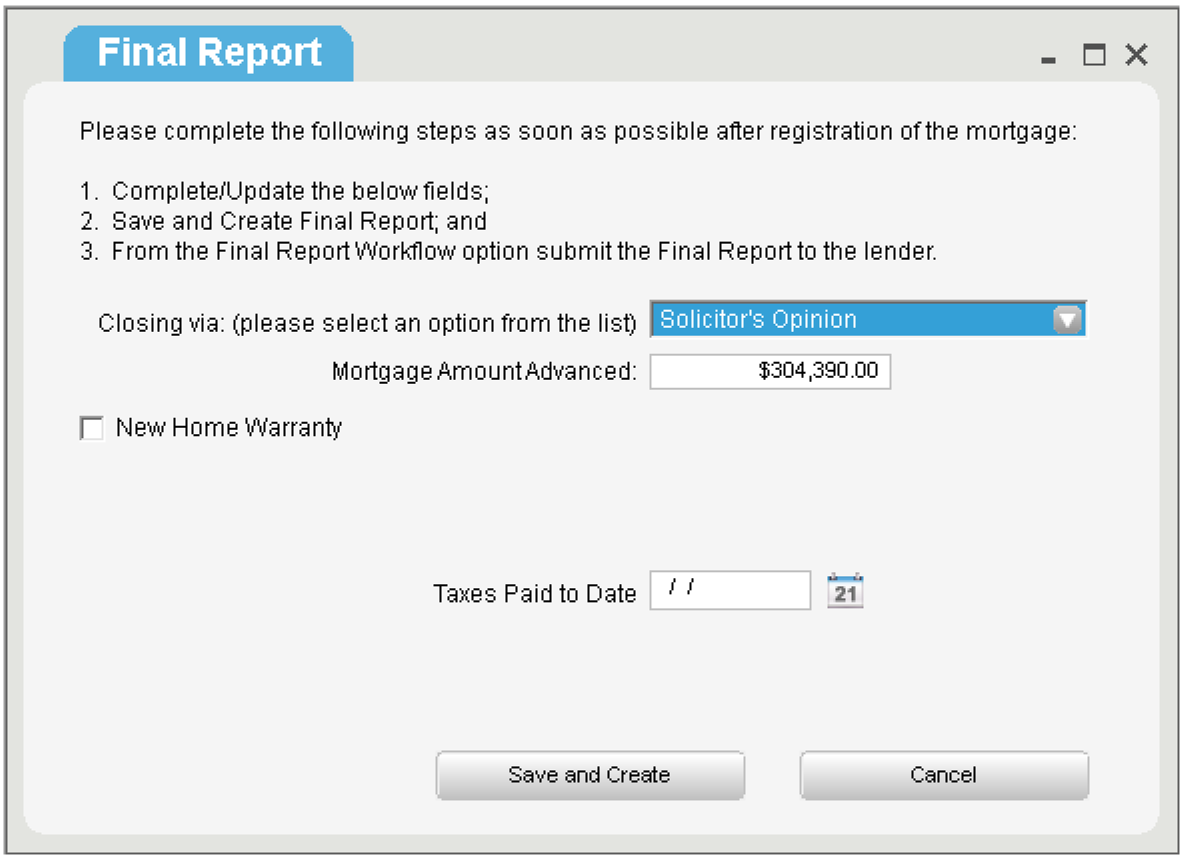
2. The lender requires you to scan and upload only the documents identified in the instruction package.

3. Documents that have been submitted electronically are not to be mailed to the lender.

Step 13 – Submitting the Solicitor's Final Report on Title

To submit the Solicitor's Final Report, click the Final Report link from the left navigation menu located within Tab G.

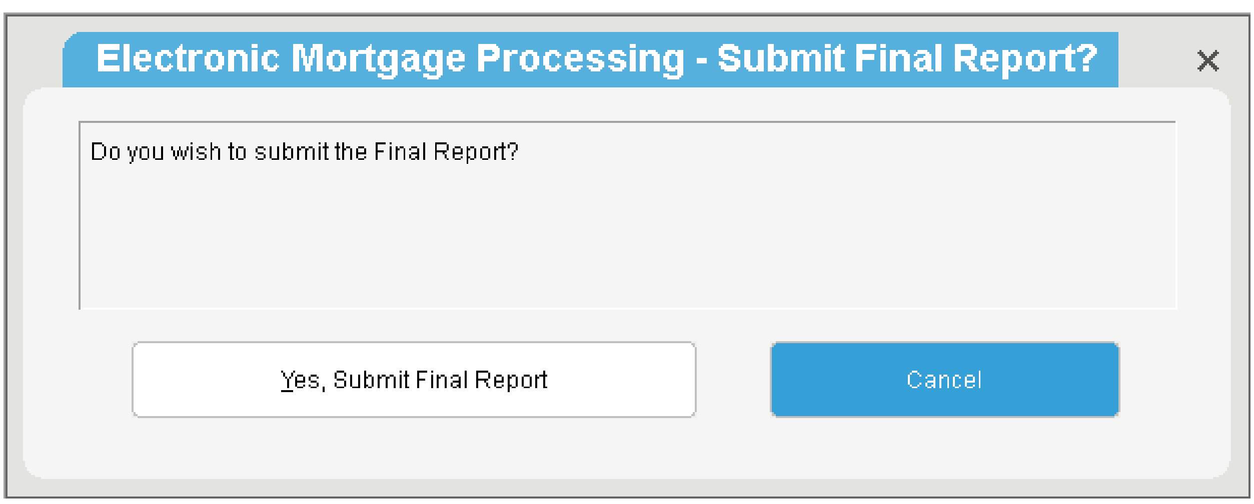
If the Lender requires additional information for the Final Report, a screen will be displayed where you can enter in the required information.

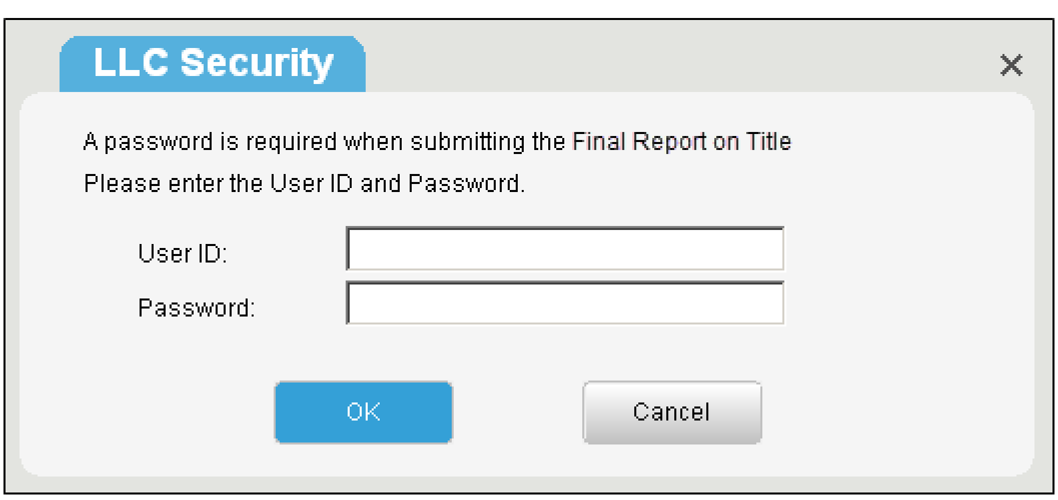


Once completed, click on the [**Save and Create**] button to continue.

Click on [**Proceed**] when prompted to download document. Review and close the document.

Continue on to submitting the Final Report, when prompted. The Lawyer will then be required to enter the LLC Password.



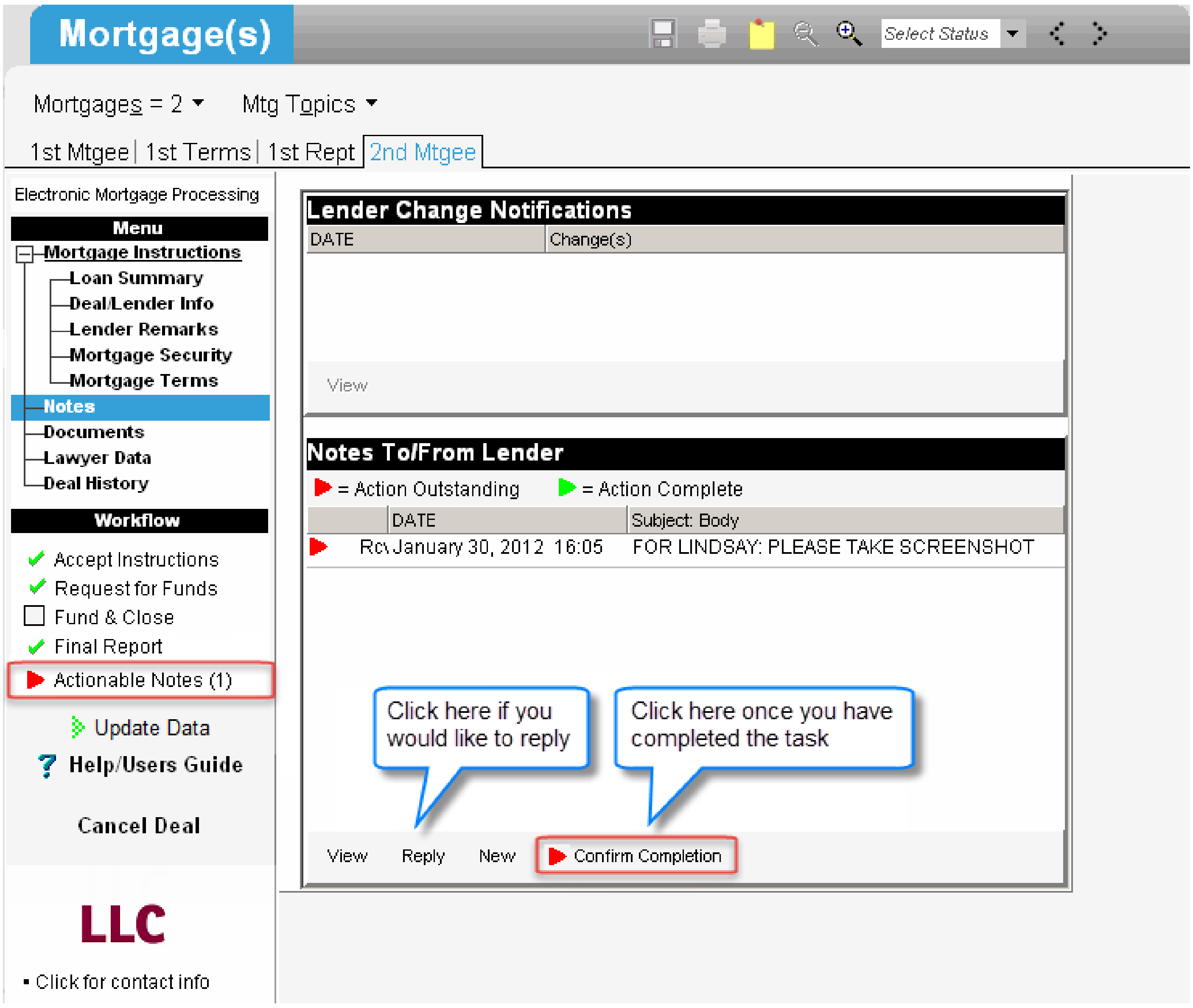


Step 14 – Completing Actionable Notes (if applicable to the Lender)

The lender will post an actionable note if they determine that the Final Report is missing information and/or documents. When the Lender posts an actionable note, an email notification will be sent to you.

To acknowledge a newly received actionable note, click [**Update Data**] within Tab G of the applicable deal which will display the applicable actionable note details. Once you have viewed the note details, click [**Acknowledge**].

Once you have completed the actionable note task, select the [**Actionable Note**] link, located under Tab G within the Workflow section, and then click [**Confirm Completion**].



NOTE: *The Actionable Notes link will be removed from the workflow section once all actionable notes have been confirmed.*

If you have any questions, please contact LLC Support at 1.877.929.0990 or at LLCSupport@fct.ca