

# Electronic Mortgage Processing in The Conveyancer®

## Reference Guide for Processing a Mortgage



Version 3.1  
October 2013

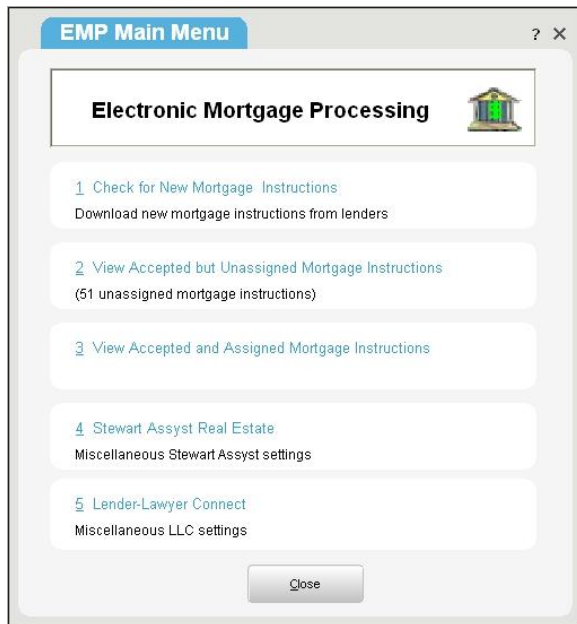


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## 1 Introduction



### The Conveyancer's Electronic Mortgage

**Processing** functionality enables you to receive mortgage instructions directly into the applicable transaction record and to submit preliminary and final reports electronically. These mortgage instructions consist of a combination of electronic documents (Adobe PDF files) and prepopulated data fields. You remain responsible for completing and/or modifying relevant data (e.g. to correct a legal description or the name of a mortgagor).

At designated times in the life of the mortgage process, data is electronically exchanged with the lender through **Stewart Assyst Real Estate**, such that lawyer data is transmitted from your transaction record to the lender, and updated lender data is received into your transaction record. Documents, including the preliminary and

final reports to the lender, are also delivered electronically.

The system is designed to maximize efficiency with minimum effect on your ordinary workflow.

The EMP Main Menu provides access to features described in this manual. To access this menu, click **Tools > EMP Options**.

## 2 Sign Up with Stewart Assyst Real Estate

**Stewart Assyst Real Estate** is the network through which data from the lender is communicated to you (i.e. into **The Conveyancer**) and through which your data is transmitted back to the lender.

To access **Stewart Assyst Real Estate**, each solicitor who will be acting on a transaction must sign up with **Stewart Assyst Real Estate**. The signup process requires a personal attendance by a **Stewart Assyst Real Estate** representative. The solicitor will be provided with login credentials as well as a digital signature to facilitate secure signing of preliminary and final reports.

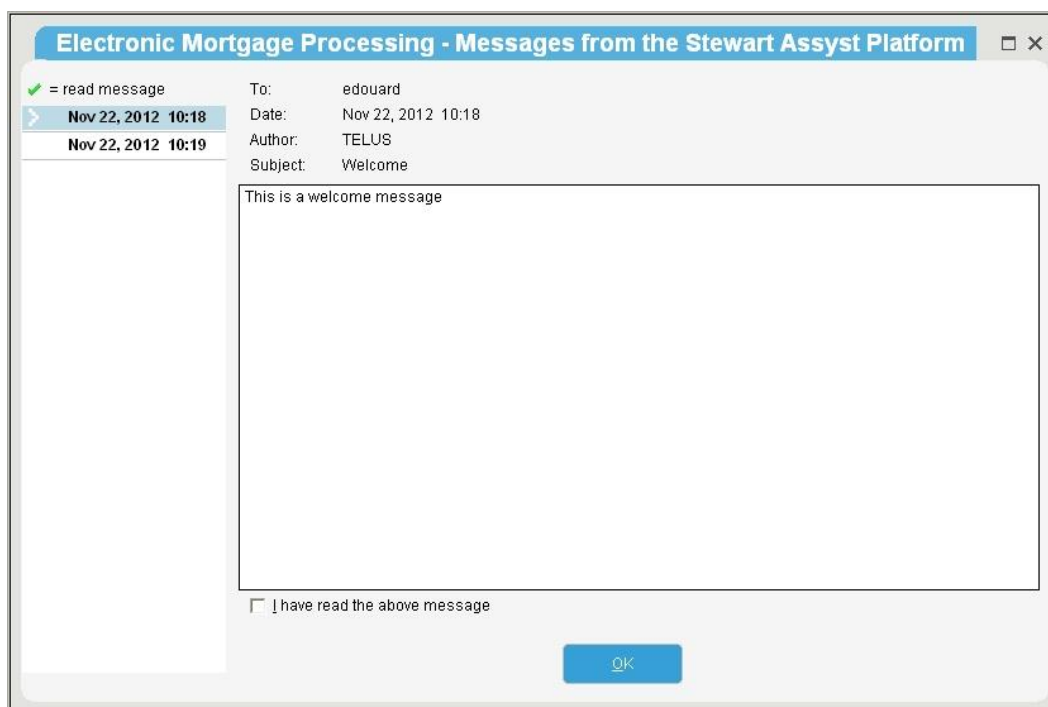
For more information on signing up for access to the platform, contact **Stewart Assyst Real Estate** at 1.866.969.9101.

## 3 Configuration and Profile Information

Before using **Electronic Mortgage Processing** with **Stewart Assyst Real Estate**, some configuration is required, in particular to the **Lawyer Profile**. See [Appendix A](#) for configuration details.

### 4 View Messages from Stewart Assyst Real Estate

New messages from **Stewart Assyst Real Estate** will be displayed automatically when received. These messages include general information about the system and the lenders, and are not associated with a specific transaction. To re-access such messages, click **Tools > EMP Options > Stewart Assyst Real Estate > Check for Stewart Assyst Messages > select the required Stewart Assyst Real Estate user > Check for Stewart Assyst Messages**.



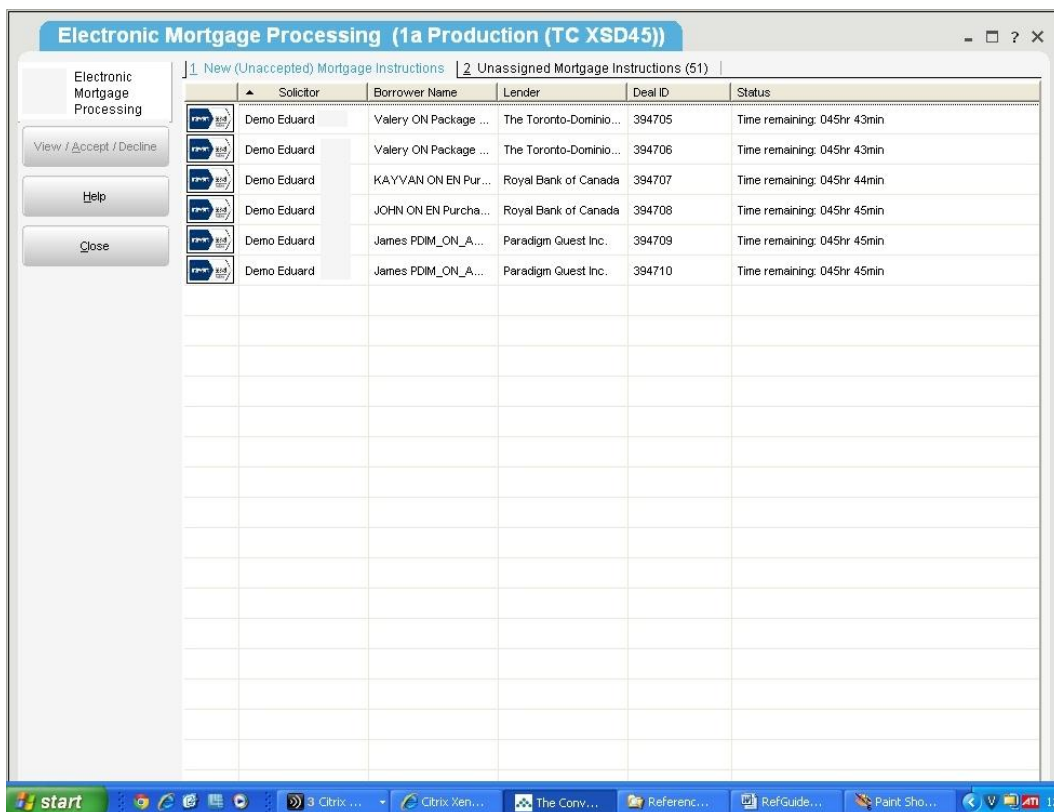
You must click **I have read the above message** for each new message to continue.

## 5 View New (Unaccepted) Mortgage Instructions

Unless disabled in your lawyer profile, you will be notified by email when new electronic mortgage instructions are available for you to pick up.

Click **[Check for New Mortgage Instructions]** in the **EMP Main Menu** to connect with the **Stewart Assyst Real Estate** platform to determine whether there are new mortgage instructions. Select the required solicitors and then click **Proceed**.

New (unaccepted) mortgage instructions will be listed, and you have two business days from when they were submitted by the lender within which to accept (or decline) them. The remaining time for acceptance will be displayed in the list.



| Solicitor   | Borrower Name         | Lender                 | Deal ID | Status                      |
|-------------|-----------------------|------------------------|---------|-----------------------------|
| Demo Eduard | Valery ON Package ... | The Toronto-Dominio... | 394705  | Time remaining: 045hr 43min |
| Demo Eduard | Valery ON Package ... | The Toronto-Dominio... | 394706  | Time remaining: 045hr 43min |
| Demo Eduard | KAYVAN ON EN Pur...   | Royal Bank of Canada   | 394707  | Time remaining: 045hr 44min |
| Demo Eduard | JOHN ON EN Purcha...  | Royal Bank of Canada   | 394708  | Time remaining: 045hr 45min |
| Demo Eduard | James PDIM_ON_A...    | Paradigm Guest Inc.    | 394709  | Time remaining: 045hr 45min |
| Demo Eduard | James PDIM_ON_A...    | Paradigm Guest Inc.    | 394710  | Time remaining: 045hr 45min |

The lawyer profile contains an out-of-office notification feature, which should be used to alert lenders when you are away and unable to pick up mortgage instructions.

To proceed, select an entry and click the **[View / Accept / Decline]** button. A summary of the key mortgage details will be displayed, and you can proceed to accept or decline the instructions.

## 6 Accept or Decline Mortgage Instructions

Select an entry in the list of new mortgage instructions and click **[View / Accept / Decline]**. View the particulars and select to accept or decline the instructions. If you accept, the associated fee will be displayed and you will be prompted to confirm your acceptance of the terms and conditions as well as the billing terms.

**View / Accept / Decline Mortgage Instructions**

Solicitor: Demo Eduard  
Stewart Assyst File No.: 394705  
Program Type: New Loan  
Borrower(s): Valery ON Package 530108 Conventional - fixed - closed  
Lender: The Toronto-Dominion Bank  
Property Address: 1000 De Serigny Toronto, ON M3J 0G7  
Funding Date: May 16, 2012  
Interest Adj. Date: June 1, 2012  
First Payment Date: July 1, 2012  
Last Payment Date: June 1, 2014

**Accept Instructions** **Decline Instructions** **Cancel**

**Electronic Mortgage Processing: Terms & Conditions, Payment Info**

Billing Information

| FEE DESCRIPTION                                           | QUANTITY | RATE  | ITEM TOTAL   |
|-----------------------------------------------------------|----------|-------|--------------|
| Electronic Mortgage Instructions (after \$10.00 discount) | 1        | 39.00 | 39.00        |
| HST                                                       |          |       | 5.07         |
| <b>Total</b>                                              |          |       | <b>44.07</b> |

Terms and Conditions:  
To accept this file, you must accept the following agreement and confirm payment of the Assyst Real Estate fee.

**Click to View Terms and Conditions Document**

☐ I agree to the above terms and conditions

**Accept and Pay** **Close**

Once the instructions have been accepted, an invoice is displayed.

The screenshot shows a 'Payment' window with a blue title bar and a 'Confirm' button in the top right corner. The main content area is divided into two sections: 'Invoice' and 'Payment'.

**Invoice Section:**

|               |                                                         |         |         |         |
|---------------|---------------------------------------------------------|---------|---------|---------|
| File No.      | 394705                                                  | Amount: | \$39.00 |         |
| Main Borrower | ON Package 530108 Conventional - fixed - closed, Valery |         | GST:    | \$0.00  |
| Address:      | 1000 de serigny, TORONTO, ON, M3J0G7                    |         | HST:    | \$5.07  |
|               |                                                         |         | Total:  | \$44.07 |

**Payment Section:**

Credit Card Type: **Visa**


Credit Card Number: **5191\*\*\*\*\*2224**

Expiry Date: **12/2012** (MM/YYYY)

Cardholder Name: **Test Dopro 123**

☐ Update my profile  
Check the box if you want to save the information about your credit card within your profile.

[View service agreement](#)

  
powered by VeriSign  
ABOUT SSL CERTIFICATES

[Close](#)

Click **Confirm** in the top right corner and then **Close** in the bottom right corner. The entry is removed from the list of new (unaccepted) mortgage instructions. You can do one of the following:

- ✓ assign the mortgage instructions to a new transaction record, in which case you will be prompted to specify the new record number, file number and transaction type (purchase or mortgage);
- ✓ assign the mortgage instructions to an existing transaction record, in which case you will be prompted to select the transaction type (purchase or mortgage) and then select the target record from a list;
- ✓ defer this step until a later date, in which case it will be added to the list of **Unassigned Mortgage Instructions** (this list can be accessed from the **EMP Main Menu**).

## Electronic Mortgage Processing in The Conveyancer

Assign Accepted Mortgage Instructions to Transaction Record

Mortgage instructions successfully accepted.

|                          |                                                        |
|--------------------------|--------------------------------------------------------|
| Solicitor:               | Demo Eduard                                            |
| Stewart Assyst File No.: | 394705                                                 |
| Program Type:            | New Loan                                               |
| Borrower(s):             | Valery ON Package 530108 Conventional - fixed - closed |
| Lender:                  | The Toronto-Dominion Bank                              |
| Property Address:        | 1000 De Serigny Toronto, ON M3J 0G7                    |
| Funding Date:            | May 16, 2012                                           |
| Interest Adj. Date:      | June 1, 2012                                           |
| First Payment Date:      | July 1, 2012                                           |
| Last Payment Date:       | June 1, 2014                                           |

Remarks from Lender:

SOLICITOR PROVIDING ONHW AND CERTIFICATE OF COMPLETION PRIOR TO CLSG. -

Assign to New Transaction Record

Assign to Existing Transaction Record

Assign Later



## 7 View Lender Data

Information pertaining to the mortgage, as provided by the lender, will be displayed in the five **Mortgage Instructions** screens identified in the menu in the left panel of **Tab G**. The five screens are:

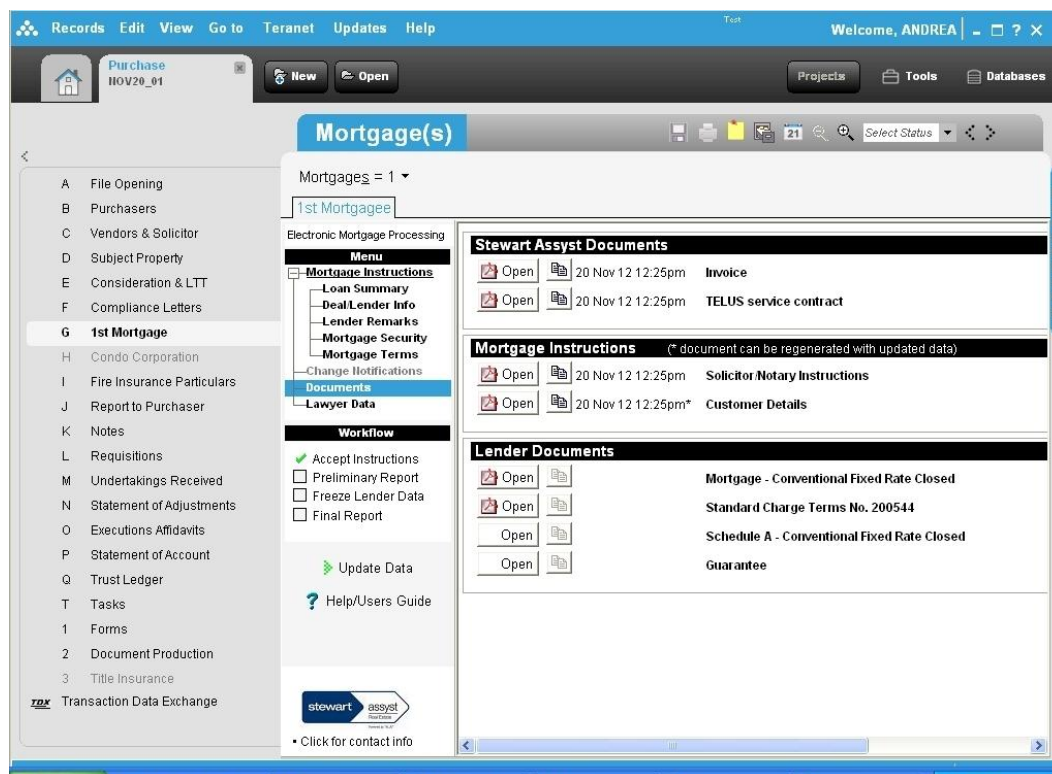
- ✓ **Loan Summary** – Sets out key terms of the mortgage, such as the parties, subject property, loan number, etc. (as it is a summary, this data is also found in other screens).
- ✓ **Deal/Lender Info** – Contains the **Stewart Assyst Real Estate** deal number and lender details.
- ✓ **Lender Remarks** – Special instructions or comments from the lender.
- ✓ **Mortgage Security** – Identifies the borrowers, guarantors, subject property, etc.
- ✓ **Mortgage Terms** – Loan amount, key dates and payment details, etc.

The screenshot displays the Stewart Assyst Real Estate software interface. The top menu bar includes 'Records', 'Edit', 'View', 'Go to', 'Teranet', 'Updates', and 'Help'. The user is logged in as 'ANDREA'. The main window is titled 'Mortgage(s)' and shows a list of mortgages with '1st Mortgagee' selected. The left sidebar contains a menu with options like 'File Opening', 'Purchasers', 'Vendors & Solicitor', 'Subject Property', 'Consideration & LTT', 'Compliance Letters', '1st Mortgage', 'Condo Corporation', 'Fire Insurance Particulars', 'Report to Purchaser', 'Notes', 'Requisitions', 'Undertakings Received', 'Statement of Adjustments', 'Executions Affidavits', 'Statement of Account', 'Trust Ledger', 'Tasks', 'Forms', 'Document Production', 'Title Insurance', and 'Transaction Data Exchange'. The central workspace shows the 'Mortgage Instructions' menu with options like 'Loan Summary', 'Deal/Lender Info', 'Lender Remarks', 'Mortgage Security', 'Mortgage Terms', 'Change Notifications', 'Documents', and 'Lawyer Data'. The 'Loan Summary' form on the right contains the following data:

|                        |                                                        |
|------------------------|--------------------------------------------------------|
| Stewart Assyst Deal ID | 394705                                                 |
| Last Communication     | November 20, 2012 12:25 PM                             |
| Designated Solicitor   | Demo Eduard                                            |
| Lender                 | THE TORONTO-DOMINION BANK                              |
| Loan No.               | 121120095123                                           |
| Priority of Mortgage   | 1st                                                    |
| Borrowers              | Valery ON Package 530108 Conventional - fixed - closed |
| Guarantors             |                                                        |
| Property Address       | 1000 De Serigny, Toronto, Ontario M3J 0G7              |
| Legal Description      | LOT 102R PLAN M3                                       |
| Principal              | \$211,200.00                                           |
| Funding Date           | May 16, 2012                                           |

## 8 View Documents

The mortgage instructions and other documents submitted by the lender (and **Stewart Assyst Real Estate**) are accessed from the **Documents** screen in the Tab “G” menu. Read the mortgage instructions for the specific transaction as well as the general instructions.



## 9 Read Lender Change Notifications

Each time that the lender makes a change to the data, the system generates a note describing the change. The changes, if any, for a particular transaction can be viewed from the **Change Notifications** menu option.

**Lender Change Notification re Stewart Assyst Deal ID No. 394705**

☒ = Read Notification

**November 21, 2012 1:**

**November 21, 2012 1:**

Notification ID: 8541  
Date Created: November 20, 2012 21:00  
Date Modified: November 21, 2012 11:53  
Author: systeme  
Subject: TDCT Request for funds reminder

Dear Edouard DoProcess

Re: Mortgage #: 121120095123 (please quote number on all correspondence)

Mortgagor(s): Valery ON Package 530108 Conventional - fixed - closed

Property Address: 1000 de serigny, TORONTO, Ontario, M3J 0G7

Mortgage Amount: \$211,200.00  
Closing Date: 2012-05-16

Further to our instructions to you on the above-noted Mortgage transaction, you undertook to complete a Request for Funds/Information form, sign it by digital signature and send it via the Assyst Platform at least 2 business days before the anticipated Closing Date.

☐ I have read the above notes

OK



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### 10 Complete File Information

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You are required to complete data fields in the transaction record in the usual way (e.g. mortgagors' names, legal description, property address, etc.).

With respect to fields for which the lender and the lawyer might have different recorded data:

- ✓ The lawyer's data-entry field in **The Conveyancer** will contain a  icon which, if clicked, will display the lender version of the data; the user then has the option to apply the lender's data to populate the field.
- ✓ The **Tab G** representation of the mortgage instructions will contain a yellow icon with the letter of the tab containing the corresponding lawyer data (e.g. ) which, if clicked, will display the lawyer version of the data as entered in such tab.

The solicitor's version of "overlapping" data will prevail in documents you generate. However, if there is a substantive difference in the data (e.g. a different property owner as opposed to a different spelling of the owner's name), it remains the solicitor's obligation to notify the lender, outside of the **Stewart Assyst Real Estate** platform.

## 11 Submit the Preliminary Report

Click the **Preliminary Report** label in the **Workflow** list when you wish to view or submit your preliminary report. If applicable, you will be alerted as to mandatory data which has not yet been completed. The report is in Adobe PDF and, where possible, fields will be prepopulated with the available data. Prior to submitting the report, you are required to verify the data and complete the document as you would a paper form report.

To submit the report, you must apply your digital signature (provided to the solicitor as part of the **Stewart Assyst Real Estate** sign-up process or in Manitoba, as provided by Legal Data Resources Corporation) by clicking the box embedded in the top right corner of the form. Refer to [Appendix B](#) for detailed instructions on applying your electronic signature to a document. Upon exiting the preliminary report, it will be saved (and can be reopened when you next click the **Preliminary Report** label in the **Workflow** list). A green checkmark (✓) in the **Workflow** list indicates that the report was digitally signed and submitted to the **Stewart Assyst Real Estate** platform.

**Form 3328 (03-02-2012)**

Digitally signed by  
Andrea Parks  
DN: cn=Andrea Parks,  
o=FDOLP, ou=  
est.com, c=CA  
Date: 2012.11.20  
16:16:44 -05'00'

**RBC**

**REQUEST FOR MORTGAGE FUNDS**

**Please ensure we receive this request at least three days before the funds are required.**

|                                                                                                                                                                                                                                            |                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> For All Provinces and Territories, except Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>10 York Mills Road - 3rd Floor<br>Toronto, ON - M2P 0A2<br>Fax: 1-877-794-9325 | <input type="checkbox"/> For Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>P.O. Box 6011, Centre-Ville Station<br>Montreal, QC H3C 3B8<br>Fax: 1-866-718-1577 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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### 12 Request Freeze of Lender Data


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At your option, you can direct **Stewart Assyst Real Estate** to terminate the ability of the lender to make further modifications to the mortgage instructions for a transaction. The lawyer would typically do this a few days prior to closing, perhaps when the appointment with the client has been scheduled. When the user clicks the **Freeze Lender Data** option, the status name changes to **Freeze Requested** and the lender has one business day within which to verify the mortgage terms and effect any changes, after which the **Lender Data** will be frozen on the system. Any changes required thereafter will be made by the lender directly with the borrower.

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### 13 Generate and Print Closing Documents


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Click **Documents** from within the EMP Menu in the left panel; then click  **Open** to access, generate and print the lender closing documents. There is no need to download documents from the lender's website or to use **The Conveyancer's Lender Documents** feature.

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### 14 Complete the Transaction

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Close the mortgage transaction in the usual manner. In Ontario only, to add a **Stewart Assyst Real Estate** document (from the **Documents** menu option) as an attachment to an **e-reg** document, click the  icon adjacent to the document name, and then copy and paste the file name into the appropriate **Teraview** field.

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### 15 Submit the Final Report

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Following closing, enter the registration particulars in the **Lawyer Data** screen in **Tab G** and then click the **Final Report** label in the **Workflow** list so as to submit your final report to the mortgagee. The procedure, including the requirement to apply a digital signature, is identical to that described above for **Preliminary Report**. In general, no enclosures or attachments are required with the final report (an exception is the requirement to forward the signed, original, personal guarantee, if applicable).

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### 16 Close the File

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Retain all relevant information about the transaction before closing the file. Files will be automatically closed on **Stewart Assyst Real Estate** 30 days after submission of the final report and will cease to be accessible by electronic communication with **Stewart Assyst Real Estate** after approximately six months.

## 17 Contact Information

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If you have any questions or encounter any problems involving **The Conveyancer's** integration with **Stewart Assyst Real Estate**, contact the **Stewart Assyst Service Desk** or **Do Process** as required.

### Stewart Assyst Service Desk:

**Telephone:** 1.866.969.9101

**email:** [stgtorsoftwaresupport@stewart.com](mailto:stgtorsoftwaresupport@stewart.com)

### Do Process LP:

**Telephone:** 416.322.6111 or toll-free at 1.866.367.7648

**email:** [inquiries@doprocess.com](mailto:inquiries@doprocess.com)

### Appendix A: Configure the Application

#### Enter the Stewart Assyst Real Estate Account Information

Before using the **Electronic Mortgage Processing** functionality with **Stewart Assyst Real Estate**, some configuration is required.

Configure the following from within the **Stewart Assyst** tab of the **Lawyer Profile** for each lawyer who will be acting on such transactions:

- ✓ complete the information associated with your **Stewart Assyst Real Estate** account (address, phone, fax, email, etc.) as well as your **Stewart Assyst Real Estate User Name** and **Password**;

The screenshot shows a web application window titled "Lawyer Profile - Demo Eduard". It has a tabbed interface with tabs: 1 General Info, 2 Do Process Login Info, 3 Teranet, 4 Stewart Title, 5 First Canadian Title, 6 Chicago Title, 7 Stewart Assyst (selected), 8 N/A, 9 Trust Acct, and 10. The "Stewart Assyst" tab is active, displaying the "Stewart Assyst Account Information" form. The form includes fields for User Name (edouard), Password (masked with asterisks), Personal Email (edouard@doprocess.com), Alternate Email (checked N/A), Phone (416-222-2222), Fax (123-456-0987), Address (123 Test Street, Calgary Alberta, C1C 1C1), and Language (English). There is also a field for "Your Stewart Assyst Name" (Edouard DoProcess). Below these fields are sections for "Incoming Alerts" and "Out-of-Office Notification". The "Incoming Alerts" section has a dropdown for "Email address for Incoming Alerts" (set to Personal Email) and two checked checkboxes: "Send me an email if new mortgage instructions become available" and "Send me an email in the event of a Lender Change Notification". There is a "View Stewart Assyst Messages" button. The "Out-of-Office Notification" section has a field for "I will be out of the office from" (Fri Nov 30 2012 to Fri Dec 14 2012). At the bottom left is a "Test Stewart Assyst Login" button, and at the bottom right are "OK" and "Cancel" buttons.

- ✓ specify whether you wish to receive notification of the arrival of new mortgage instructions and/or notification of each update or change effected by the lender to existing mortgage instructions;
- ✓ ensure that **Do Process** login credentials have been entered in the **Do Process Login Info** tab. If you do not have these credentials, please contact **Do Process** at 416.322.6111 or 1.866.367.7648.
- ✓ complete the **Trust Acct** tab of the **Lawyer Profile**.



The first password you receive from **Stewart Assyst Real Estate** will be a temporary password. This password will be automatically changed (and the updated password will be displayed to you) when **The Conveyancer** communicates to **Stewart Assyst Real Estate** that the **Stewart Assyst Real Estate** profile information has been completed.

In the event that **The Conveyancer** is installed on multiple standalone (non-networked) computers, the **Stewart Assyst** tab must be completed in the same manner on each workstation, except the password entered on all workstations after the first should be the updated one rather than the temporary one.

The password will continue to be changed automatically every couple of months for security reasons, and each time that the password is changed, the updated password will be displayed to you. In the event that **The Conveyancer** is installed on multiple standalone (non-networked) computers, the updated password must be recorded in the **Stewart Assyst** tab of the **Lawyer Profile** for each other workstation.

Changes in the Stewart Assyst tab of the Lawyer Profile should be concluded by clicking the **[Submit changes to Account Information to Stewart Assyst Real Estate]** button.

**Note:** To test the validity of the user name and password, click the **[Test Stewart Assyst Login]** button at the bottom of the tab.

**Note:** If you will be unable to pick up incoming mortgage instructions by reason of absence from the office, this information can be submitted to **Stewart Assyst Real Estate** through the designated fields in the **Lawyer Profile**.

**Note:** If you lose or forget your **Stewart Assyst Real Estate** password, you can direct, from within the **Lawyer Profile**, that it be sent to the individual's personal email address on record with **Stewart Assyst Real Estate**.

## Configure the System for Multiple Solicitors

By default, when checking for new mortgage instructions, the system will check on behalf of all solicitors for whom **Stewart Assyst Real Estate** login information has been recorded.

To override this setting so that you will be prompted to confirm which individuals' instructions are being requested, click **Tools > EMP Options > Stewart Assyst Real Estate > Configuration > Manually select from list of solicitors and law clerks**.

### Appendix B: Apply an Electronic Signature

Upon completion of a **Preliminary Report** or **Final Report**, the solicitor must apply a digital signature (provided to the solicitor as part of the **Stewart Assyst Real Estate** sign-up process or in Manitoba, as provided by Legal Data Resources Corporation) by clicking in the box situated in the top right corner of the first page:


**SAVE DATA**  
Form 3328 (03-02-2012)  
[Click here to sign and submit the document to the lender](#)

**RBC**

**REQUEST FOR MORTGAGE FUNDS**

Please ensure we receive this request at least three days before the funds are required.

|                                                                                                                                                                                                                                            |                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> For All Provinces and Territories, except Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>10 York Mills Road - 3rd Floor<br>Toronto, ON - M2P 0A2<br>Fax: 1-877-794-9325 | <input type="checkbox"/> For Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>P.O. Box 6011, Centre-Ville Station<br>Montreal, QC H3C 3B8<br>Fax: 1-866-718-1577 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Click in the box in the top right corner to display the **Sign Document** box. Insert the password for your digital signature in the **Password** field and click . The assigned signature appears in the box:

**RBC**

**REQUEST FOR MORTGAGE FUNDS**

Please ensure we receive this request at least three days before the funds are required.

|                                                                                                                                                                                                                                            |                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> For All Provinces and Territories, except Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>10 York Mills Road - 3rd Floor<br>Toronto, ON - M2P 0A2<br>Fax: 1-877-794-9325 | <input type="checkbox"/> For Quebec and Iqaluit:<br>Royal Bank / Royal Trust<br>Personal Service Centre<br>P.O. Box 6011, Centre-Ville Station<br>Montreal, QC H3C 3B8<br>Fax: 1-866-718-1577 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Form 3328 (03-02-2012)  
Digitally signed by  
Andrea Parks  
DN: cn=Andrea Parks,  
o=TDCLP, ou=  
Legal/Andrea@doproc,  
email=Andrea@doproc,  
c=CA  
Date: 2012.11.20  
16:16:44 -05'00'

## Appendix C: Generate Transaction Reports

From the **EMP Main Menu**, accessed from **Tools > EMP Options**, you can generate the following types of reports:

- ✓ **New (Unaccepted) Mortgage Instructions – The Conveyancer** will connect to **Stewart Assyst Real Estate**, and a list will be displayed showing the new mortgage instructions available for pickup by all solicitors in your law firm with **EMP** credentials (or, depending on your configuration, for those selected from a list). If not accepted or declined within two business days of submission by the lender, mortgage instructions will be removed from the list.
- ✓ **Accepted but Unassigned Mortgage Instructions** – If mortgage instructions have been accepted, but not assigned to a specific transaction record, they appear in this list. Click the appropriate button in the left panel to assign the mortgage instructions to either a new or existing transaction record, or to view the deal summary, the **Stewart Assyst Real Estate Terms and Conditions** or the **Stewart Assyst Real Estate Transaction Invoice**.

| Solicitor   | Borrower Name      | Lender                 | Deal ID | Accepted On         | Status                             |
|-------------|--------------------|------------------------|---------|---------------------|------------------------------------|
| Doproce     | Roots Albert       | The Toronto-Dominio... | 390900  | 2011-08-10 02:25 PM | Not assigned to Transaction Record |
| Doproce     | Roots Sara         | The Toronto-Dominio... | 390901  | 2011-08-10 02:34 PM | Not assigned to Transaction Record |
| Demo Eduard | Principal Borrower | Royal Bank of Canada   | 389220  | 2010-11-04 11:37 AM | Not assigned to Transaction Record |
| Demo Eduard | Paris France       | Royal Bank of Canada   | 389293  | 2010-11-08 10:44 AM | Not assigned to Transaction Record |
| Demo Eduard | Vegas Nevada       | Royal Bank of Canada   | 389296  | 2010-11-08 10:52 AM | Not assigned to Transaction Record |
| Demo Eduard | Ottawa Canada      | Royal Bank of Canada   | 389299  | 2010-11-05 02:47 PM | Not assigned to Transaction Record |
| Demo Eduard | Mathieu Proulx     | Royal Bank of Canada   | 389537  | 2010-11-22 01:05 PM | Not assigned to Transaction Record |
| Demo Eduard | Sidney Rice        | The Toronto-Dominio... | 390411  | 2011-04-13 03:28 PM | Not assigned to Transaction Record |
| Demo Eduard | VINCENT JACKSON    | Royal Bank of Canada   | 390414  | 2011-04-13 03:31 PM | Not assigned to Transaction Record |
| Demo Eduard | JERROCHO COTCHE... | Royal Bank of Canada   | 390415  | 2011-04-13 03:32 PM | Not assigned to Transaction Record |
| Demo Eduard | Austin Colie       | The Toronto-Dominio... | 390598  | 2011-05-27 10:46 AM | Not assigned to Transaction Record |
| Demo Eduard | Brandon Snow       | ???                    | 390682  | 2011-06-15 01:05 PM | Not assigned to Transaction Record |
| Demo Eduard | April Variable     | Royal Bank of Canada   | 391236  | 2011-09-14 04:09 PM | Not assigned to Transaction Record |
| Demo Eduard | jones Emma         | Royal Bank of Canada   | 391237  | 2011-09-14 04:11 PM | Not assigned to Transaction Record |
| Demo Eduard | jones Steven       | Royal Bank of Canada   | 391238  | 2011-09-14 04:13 PM | Not assigned to Transaction Record |
| Demo Eduard | joe MELL           | The Toronto-Dominio... | 391240  | 2011-09-15 08:58 AM | Not assigned to Transaction Record |
| Demo Eduard | joe MELL           | The Toronto-Dominio... | 391241  | 2011-09-15 09:01 AM | Not assigned to Transaction Record |
| Demo Eduard | B Laura            | The Toronto-Dominio... | 391243  | 2011-09-15 10:17 AM | Not assigned to Transaction Record |
| Demo Eduard | Bay Ali            | The Toronto-Dominio... | 391244  | 2011-09-15 10:18 AM | Not assigned to Transaction Record |
| Demo Eduard | Blais Brendon      | The Toronto-Dominio... | 391245  | 2011-09-15 10:39 AM | Not assigned to Transaction Record |
| Demo Eduard | Green John         | The Toronto-Dominio... | 391246  | 2011-09-15 10:41 AM | Not assigned to Transaction Record |
| Demo Eduard | Verte Johnathan    | The Toronto-Dominio... | 391247  | 2011-09-15 10:44 AM | Not assigned to Transaction Record |
| Demo Eduard | Tran Shi           | The Toronto-Dominio... | 391247  | 2011-09-15 10:57 PM | Not assigned to Transaction Record |

- ✓ **Accepted and Assigned Mortgage Instructions** – View a list of all the accepted and assigned mortgage instructions for all the lawyers with **Stewart Assyst Real Estate** credentials in your firm. For any entry, you can open the transaction record to which the mortgage instructions were assigned.
- ✓ **Cancelled Mortgage Instructions** – This list is available only if mortgage instructions have in fact been cancelled, and is accessed from the **Stewart Assyst Real Estate** option in the **EMP Main Menu**.