

Quick
Reference
Guide

Version 2.0
February 2019

ProSuite™ **Tips and** **Tricks**

ProSuite™ Tips & Tricks

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Do you know about...

Integrations with title insurers

ProSuite's integrations with title insurers represent one of the best ways to work more efficiently. You have the ability to access their services directly in ProSuite, saving valuable time through information sharing and not having to open new programs.

For a detailed step-by-step on how to use these integrations, you can access the following individual Quick Start Guides:

[Stewart Title NextSTEPS Quick Start Guide](#)

[FCT Quick Start Guide](#)

[Chicago Title Quick Start Guide](#)

Integration with TCOL Canada

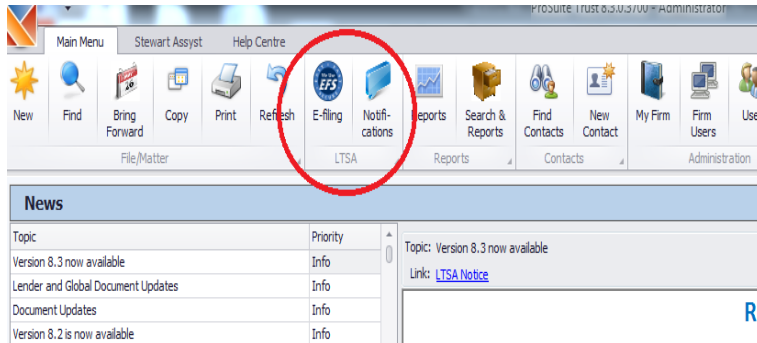
TCOL Canada provides tax certificates for over 90 different municipalities in BC. Through the integration, the necessary information from your ProSuite file will be sent to TCOL and a PDF version of the tax certificate will be returned and automatically placed in your file on your local system. If you are in a municipality that has access to the TCOL Plus feature (available only through ProSuite), the municipality data will populate directly into ProSuite's Taxes tab in addition to receiving the tax certificate.

In order to use this feature, you need an APIC account with a default credit card. [Click here](#) to register for an APIC account.

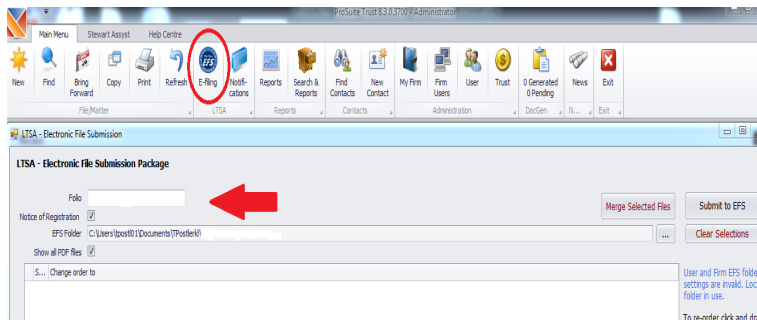
For a detailed step-by-step on how to use this integration, you can obtain a copy of the [ProSuite and TCOL Quick Start Guide here](#).

E-filing integration and notifications

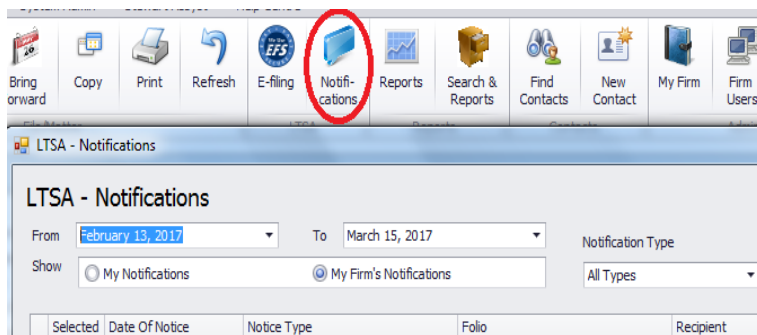
For immediate registration of documents at myLTSA, click the *E-filing* icon.



Complete the Folio with the package number/name and ensure all documents listed are in the proper order for registration. Click *Submit to EFS* and the documents will be submitted for registration. Once registered, copies of the documents with the registration number will be saved within the file under *Document Generation > Registered LTSA*.



Click on *Notifications* to view all myLTSA notifications.



Using the Mortgage Products Library

ProSuite provides a library which includes more than 90 mortgage products across all of the major lenders. Selecting mortgage products from the library will populate standard Form B details fields and provide the applicable product schedules saving you from entering the information manually. The library is regularly updated as our dedicated team proactively checks for and applies changes from the lenders so you don't have to track down the latest versions yourself.

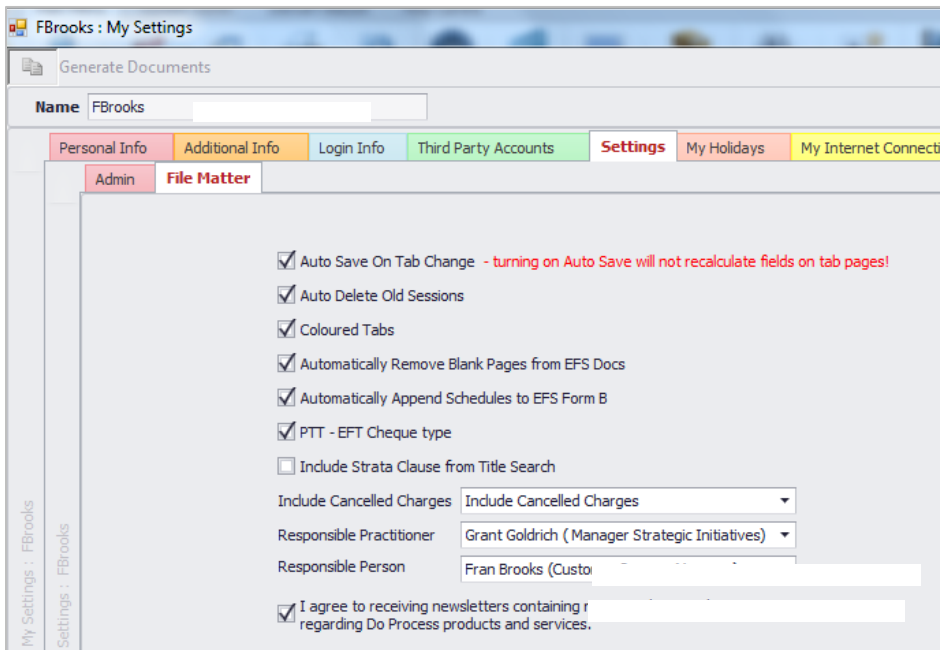
The Document Generation shortcut

To quickly access the Document Generation function, on the *Desktop* or the *Find Conveyance* window, right click on the file you need documents generated for and choose *Document Generation*.

Optimizing File Matter settings

ProSuite can save you time in a variety of ways but sometimes, it needs your authorization first to do so. By optimizing your File Matter settings, you instruct ProSuite to use key shortcuts multiple times on each transaction which greatly reduces the time it takes to complete them. To optimize your File Matter settings:

1. Go to *User > Settings > File Matter*
2. Match your settings to those shown in the following window. A detailed explanation of the benefit each selection provides follows.



FBrooks : My Settings

Generate Documents

Name: FBrooks

Personal Info Additional Info Login Info Third Party Accounts **Settings** My Holidays My Internet Connectio

Admin **File Matter**

- Auto Save On Tab Change - turning on Auto Save will not recalculate fields on tab pages!
- Auto Delete Old Sessions
- Coloured Tabs
- Automatically Remove Blank Pages from EFS Docs
- Automatically Append Schedules to EFS Form B
- PTT - EFT Cheque type
- Include Strata Clause from Title Search
- Include Cancelled Charges: Include Cancelled Charges
- Responsible Practitioner: Grant Goldrich (Manager Strategic Initiatives)
- Responsible Person: Fran Brooks (Custo
- I agree to receiving newsletters containing r regarding Do Process products and services.

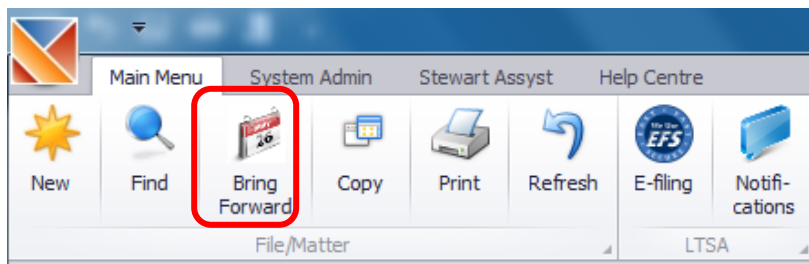
- a. *Auto Save On Tab Change* eliminates the requirement to click the *Save* icon before changing tabs in the file.
- b. *Auto Delete Old Session* eliminates the requirement to click to delete a second session of ProSuite if at login, a previous session of ProSuite was left open.
- c. *Automatically Remove Blank Pages from EFS Docs* eliminates the requirement to manually remove blank pages.
- d. *Automatically Append Schedules to EFS Form B* eliminates the requirement to manually append the Form E Schedules that do not require your input to the Form B Mortgage.

- e. *Include Strata Clause from Title Search* will populate the legal description with the strata wording on the title search that reads: "Together with a common interest..." Uncheck if you prefer not to include the wording as part of your legal description.
- f. *Include Cancelled Charges* eliminates the requirement to make the choice of whether or not to include cancelled charges on the *Property > Search* tab.
- g. Selecting a *Responsible Practitioner* eliminates the requirement to choose the responsible practitioner each time a file is created. (This can be changed when necessary at the time a file is created.)
- h. Selecting a *Responsible Person* eliminates the requirement to choose the conveyancer's name each time a file is created.

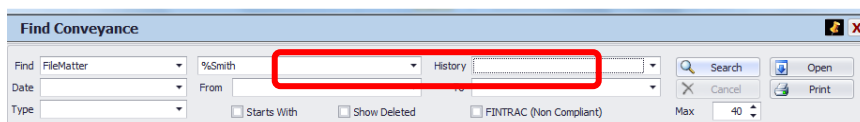
Using Wildcard to find files and Contacts

It can be difficult and time-consuming to find a particular file when you can't quite remember all the details. Thankfully the Wildcard feature is here to help! You can use the Wildcard feature in any lookup field throughout ProSuite. As an example, use the Wildcard to find all File Matters with a specified word in the file matter number field. This is also a great way to find groups of File Matters that may be related. To use the Wildcard function:

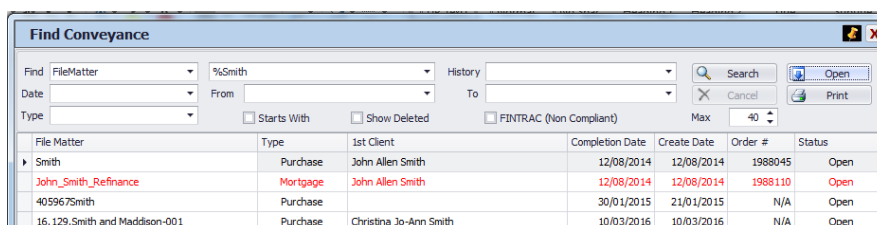
In the *Find Conveyancer* feature, go to *Find > File Matter*.



In the text field directly to the right, enter the word you want to find with a '%' sign in front. For example, if you wish to find file matters that contain the word "Smith", enter "%Smith".



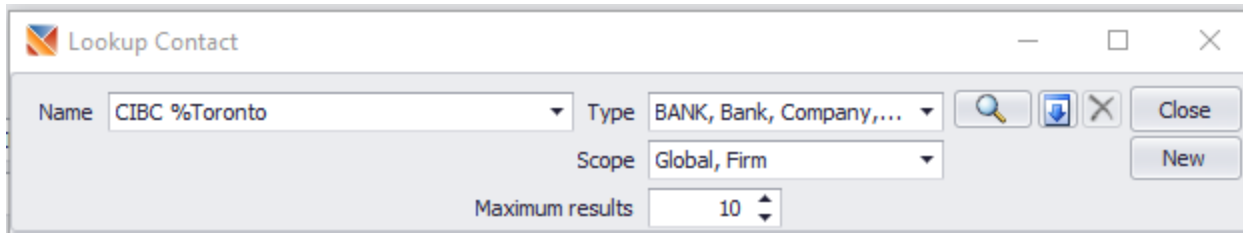
This will return a list of all File Matters that have your chosen word anywhere in the file matter number field.



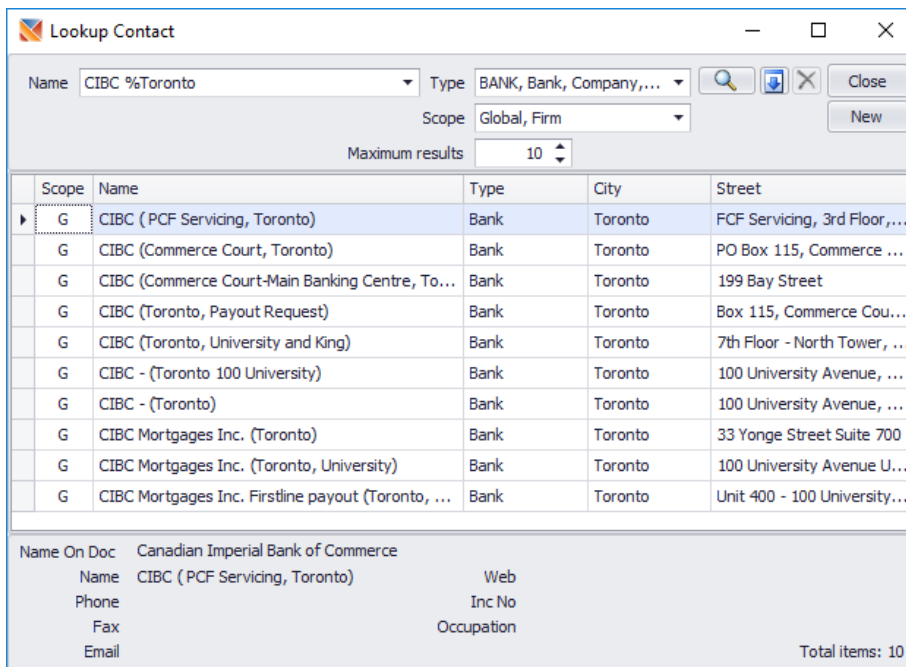
File Matter	Type	1st Client	Completion Date	Create Date	Order #	Status
Smith	Purchase	John Allen Smith	12/08/2014	12/08/2014	1988045	Open
John_Smith_Refinance	Mortgage	John Allen Smith	12/08/2014	12/08/2014	1988110	Open
405967Smith	Purchase		30/01/2015	21/01/2015	N/A	Open
16.129.Smith and Maddison-001	Purchase	Christina Jo-Ann Smith	10/03/2016	10/03/2016	N/A	Open

The wildcard can also be used when searching for Contacts.

When looking for a lender you may find it helpful to limit the search results by City. For Example, if you wish to see a list of all of the CIBC contacts in Toronto, In the Name field on the Lookup Contact window enter CIBC %Toronto



This will return a list of all CIBC branches available in the global contacts list that are located in Toronto.



Scope	Name	Type	City	Street
G	CIBC (PCF Servicing, Toronto)	Bank	Toronto	FCF Servicing, 3rd Floor,...
G	CIBC (Commerce Court, Toronto)	Bank	Toronto	PO Box 115, Commerce ...
G	CIBC (Commerce Court-Main Banking Centre, To...	Bank	Toronto	199 Bay Street
G	CIBC (Toronto, Payout Request)	Bank	Toronto	Box 115, Commerce Cou...
G	CIBC (Toronto, University and King)	Bank	Toronto	7th Floor - North Tower, ...
G	CIBC - (Toronto 100 University)	Bank	Toronto	100 University Avenue, ...
G	CIBC - (Toronto)	Bank	Toronto	100 University Avenue, ...
G	CIBC Mortgages Inc. (Toronto)	Bank	Toronto	33 Yonge Street Suite 700
G	CIBC Mortgages Inc. (Toronto, University)	Bank	Toronto	100 University Avenue U...
G	CIBC Mortgages Inc. Firstline payout (Toronto, ...	Bank	Toronto	Unit 400 - 100 University...

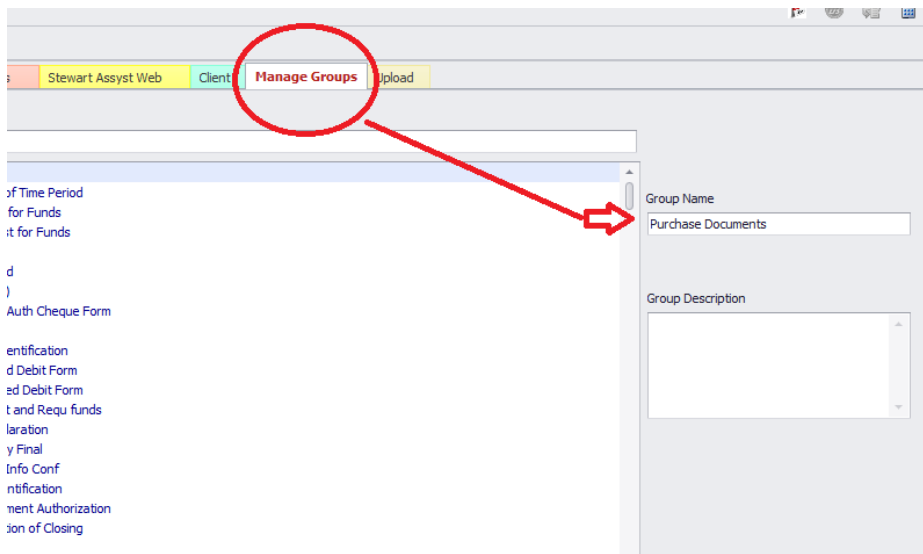
Name On Doc	Canadian Imperial Bank of Commerce	
Name	CIBC (PCF Servicing, Toronto)	Web
Phone		Inc No
Fax		Occupation
Email		

Total items: 10

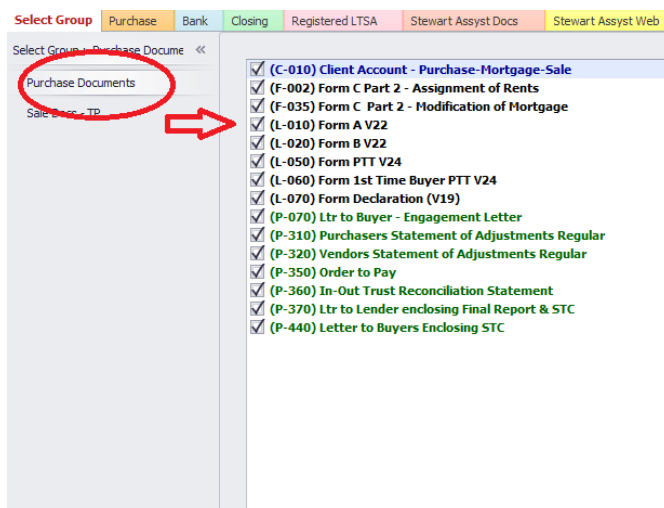
Creating Groups

Creating Groups of commonly used documents can save time on every file. To create a new Group:

In the *Generate Documents* window, go to the *Manage Groups* tab, click on the green plus sign and enter a Group Name.



Select each document you wish to include in your group and click **Save**.

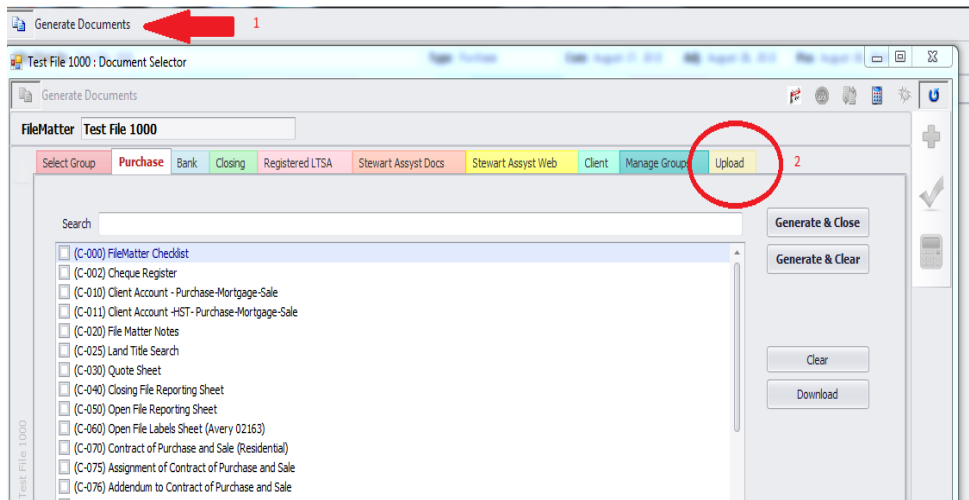


To use your new group, select it from the sidebar menu in the *Select Group* tab. All documents in your group are selected by default. Deselect any documents you do not want to generate. Click *Generate & Close*.

Customization of documents

You have the ability to control how your documents look and feel. You can make small or large changes to paragraphs, sentences or specific undertakings in a matter of minutes and store those customized documents in one central location that makes it easy for your entire staff to find. To customize a document:

Select the document you wish to customize from the *Generate Documents* window and click *Download*. Save the template to your local system.



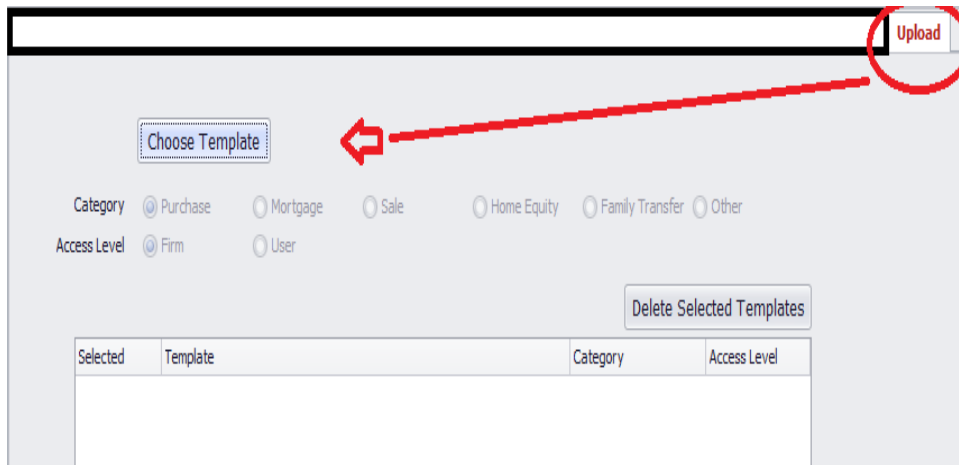
Open the template in Microsoft Word and make the required wording changes, being careful not to alter the document codes, which are indicated by square brackets, and save the template. It is recommended that you add your firm name to the template name when saving. Note that ProSuite templates have an .rtf extension and this should not be change.

```

[[LawFirm-(Name)]]
QUOTE SHEET as of [[Today]]
Fees & Disbursements
Re: → [[Gen-(ConvType)]] of [[Gen-(CivicAdr)]]
[[Notaryfirm (IWe <Caps>)]][[NotaryFirm-(AmAre)]] pleased to provide the following quote of
fees and disbursements to be incurred with respect to the above transaction.
FEES: → [[AccTotal-(AllFees$)]][[If Not (AccTot (HST?))]]
GST on Fees: → [[AccTotal-(FeesGST$)]]
PST on Fees: → [[AccTotal (FeesPST$)]][[Else]]
HST on Fees: → [[AccTotal (FeesHST$)]][[EndIf]]
TAXABLE DISBURSEMENTS:
[[AccTaxDisb (Desc [Tab] Amount$ <List>)]]
Taxable Disbursements Sub-Total: → -[[AccTotal-(TaxDisb$)]]
NON-TAXABLE DISBURSEMENTS:
[[AccNonTaxDisb (Desc [Tab] Amount$ <List>)]]
Non-Taxable Disbursements Sub-Total: → -[[AccTotal-(NonTaxDisb$)]]
TOTAL DISBURSEMENTS: → [[AccTotal-(AllDisb$)]][[If Not (AccTot (HST?))]]
GST on Disbursements: → [[AccTotal (DisbGST$)]][[If (AccTotal (DisbPST$))]]
PST on Disbursements: → [[AccTotal (DisbPST$)]][[EndIf]][[Else]]
HST on Fees: → [[AccTotal (FeesHST$)]][[EndIf]]
TOTAL ESTIMATED ACCOUNT → [[AccTotal-(Account$)]]
[[LawFirm (SigBlk)]]
All figures are estimated
E. & O.E.

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From the *Upload* tab, click *Choose Template* and navigate to the modified template. Select the category where the template will be available and select the *Access Level*. Selecting an *Access Level of Firm* will ensure others in your firm can see and generate the custom template.



The screenshot shows the ProSuite interface with the 'Upload' tab selected. A red circle highlights the 'Upload' tab, and a red arrow points from it to the 'Choose Template' button. Below the button are radio buttons for 'Category' (Purchase, Mortgage, Sale, Home Equity, Family Transfer, Other) and 'Access Level' (Firm, User). A 'Delete Selected Templates' button is also visible. At the bottom, there is a table with columns for 'Selected', 'Template', 'Category', and 'Access Level'.

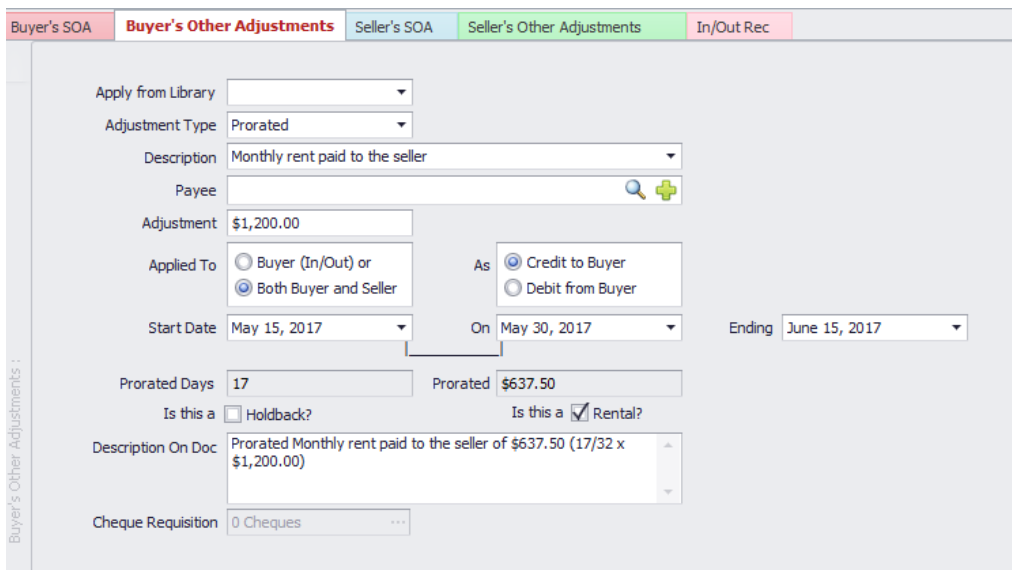
Selected	Template	Category	Access Level
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Click *Save* to complete the upload process. Once the upload process is complete, the document will appear in the *Upload* tab. The custom document will now be available for generation from the *Client* tab. Custom documents can also be added to any document Group.

How do I...

Complete a rental adjustment?

On the *Adjustments > Buyer's Other Adjustments* tab, create a *Prorated Adjustment Type* completing the *Description*, *Adjustment Amount*, *Start Date* and *Ending* fields. If the rent has already been paid to the Seller, then the *As* field should be set to *Credit to Buyer*. If the rent will be collected by the Buyer, then the *As* field should be set to *Debit from Buyer*. Select *Is this a Rental* to ensure proper calculation of the Prorated amount.



The *Description on Doc* field will be populated for you based on information entered into this screen. You can edit this field.

Input multiple persons buying a property with separate interests?

The easiest way to answer this is with an example. Let's say six persons are buying (three couples) and each couple will have an undivided 1/3 interest as joint tenants. Simply input the 1/3 interest and mark *Joint Tenants* for the second, fourth and sixth buyer while not specifying any interest or tenancy for the first, third and fifth buyers.

Print title insurance policy documents?

Policy documents are accessed differently for each of the title insurance providers available through ProSuite. If you are having difficulties printing PDF policy documents, please note there are a number of different versions of Adobe Acrobat and many different computer setups. Often the resolution is as simple as changing a couple of settings. Please call ProSuite customer service at 866.367.7648 and they will be happy to assist you in resolving the issue.

Preserve the formatting of LTO forms?

To preserve the formatting of your LTO forms, including the spacing of your signature block, ensure you always say *Yes* when prompted to save the document on closing, even if you didn't make any changes.

Schedule training on ProSuite?

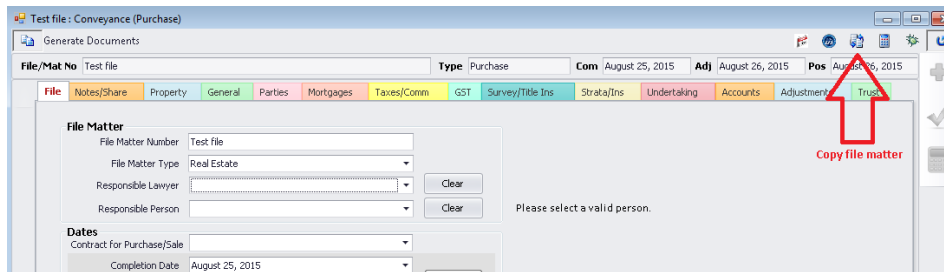
We want to provide you every opportunity to learn about and maximize the use of your software. You can register for online webinars ranging from introductory to advanced levels in our [Training Calendar](#) or you can reach out to your local [Customer Success Manager](#) to book one-on-one training.

Copy a file matter?

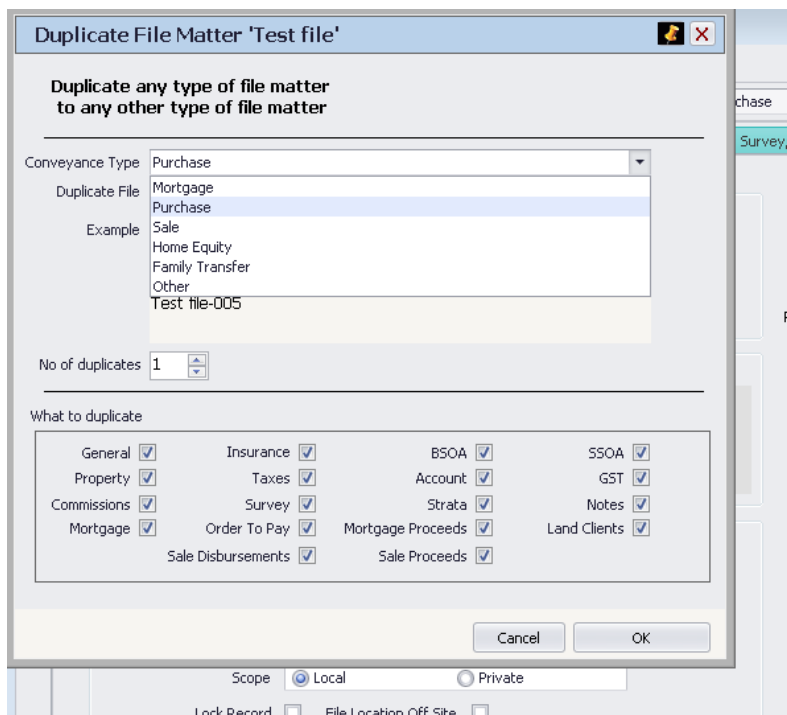
There are times when you might want to start at new file matter but use the information from a file that you have previously started. You can do so by making a copy of the file. You can also change the transaction type when the new file is created.

Note: Standard charges apply when making copies of file matters.

While viewing a file matter select the *Copy File Matter* button on the top right corner of the window.



If required, when creating the new copy of the file you can change the transaction type in the *Conveyance Type* drop down. Select the appropriate options in the *What to duplicate* section and click *OK*.



Order ProTrust cheques?

Each box of cheques contains 1000 blank cheques. To order cheques, please email inquiries@doprocess.com and include the following information:

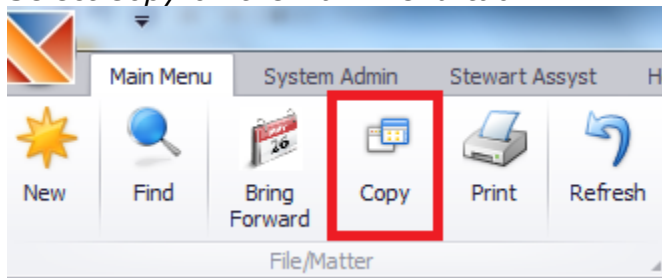
- Account Number and Firm Name
- Shipping Address
- How many boxes of cheques you would like to order

Once the order has been processed, you will receive a confirmation email and shipping will take approximately 2-3 days. Details regarding pricing can be obtained [here](#).

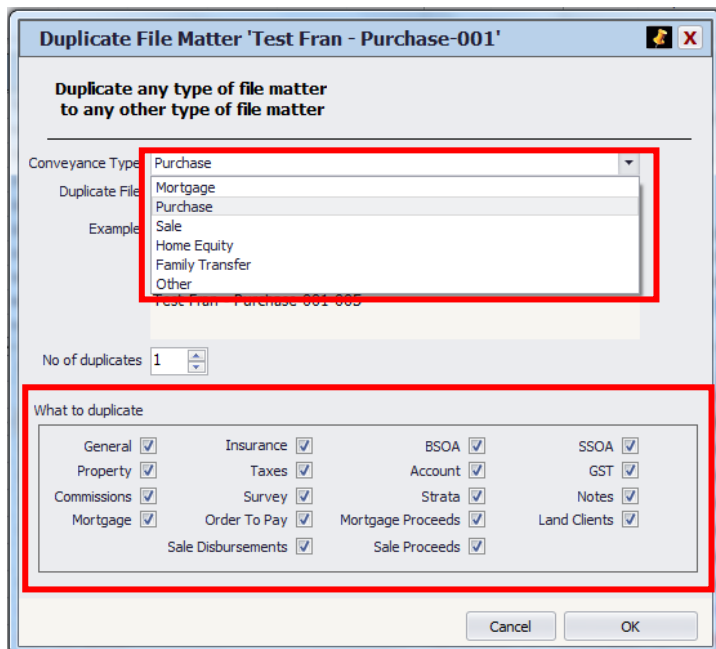
Correct a File Type mistake after doing a title search?

When a file has opened as the incorrect File Type (e.g. opened as a Purchase/Mortgage when it should be a Mortgage Only) and the title search has already been done through LTSA, you can correct the error without paying for a second search.

Select *Copy* on the *Main Menu* tab.



Select the correct file type from the dropdown menu. Also select what information should be duplicated into the new file.



General Questions

When new versions of the LTO forms are released, why do they not automatically appear in my custom document groups?

New versions of LTO forms are added as new documents in ProSuite. When a new document is added, each individual user must determine which document group, if any, they would like to add the document to. Groups can be managed using the *Manage Group* tab in the *Generate Documents* window.

Note: If edits are made to an existing document that is in one of your custom groups, the document in your group is automatically updated.

The charges remaining on title that are entered in my ProSuite file do not populate the Next Steps Title Qualifications page. Will this capability be available in the future?

We are committed to having discussions with Stewart Title in order to investigate if an improvement can be made to address this in the future.

Can I order a Stewart Title policy through ProSuite on a transaction with more than one property?

When a transaction has more than one property, you are currently unable to order a Stewart Title policy through ProSuite. We are committed to having discussions with Stewart Title in order to investigate if an improvement can be made to address this in the future.