Customizing Standard Conveyancer™ Microsoft Word Documents

Standard Conveyancer™ produces documents by combining data from individual closing files with Microsoft Word™ master documents. The benefit of this system is that information entered only once will be used for multiple documents. Also, if last-minute changes are made to the data the documents can be generated again immediately.

The master documents contain special field codes that correspond to the data entry fields in *Standard Conveyancer*™. When data from a closing file merges with a master document, the field codes in the document fill in with the corresponding data from the *Standard Conveyancer*™ file. (You may be using certain older documents that print directly from the program rather than use this merge process)

Your copy of *Standard Conveyancer*™ has hundreds of documents for real estate closings, including letters, mortgages, notes, riders, deeds, IRS forms, certifications, homestead declarations and many other documents. Each document in *Standard Conveyancer*™ can be customized for your specific needs. You may also create your own documents and add them to the *Standard Conveyancer*™ document database.

In addition to customizing the content of documents, you can choose the settings for which (if any) print batch a document appears in and the conditions under which it appears (i.e., sale, refi, or both).

The basic process of customizing or creating new documents involves three steps: (1) choosing a document similar to the one you want to create from the list of existing documents; (2) having the program add your new document to the list by making a copy of the original; and (3) customizing the copy and the settings for the print batch selection. These three steps will be outlined below as we go through creating a custom introductory letter to buyer-borrowers.

1. **Selecting a document similar to the one you want to create:**

In order to create a new document you need to choose which existing *Standard Conveyancer*™ document you want to base it on. In some cases this is easy – if you want to do a custom letter to the buyer, you should use the existing letter to the buyer. This will make things simpler, as most of the field codes you will need will already be in place. If you want to create a document that will need signatures and notarization, choose something like an existing affidavit.

To view a list of existing *Standard Conveyancer*™ documents click **Info - Document Setup** to open the **Document Information** window.

> To view a list of documents, click the **Document** button OR click the **List** button and the **Choose a Document** window opens.
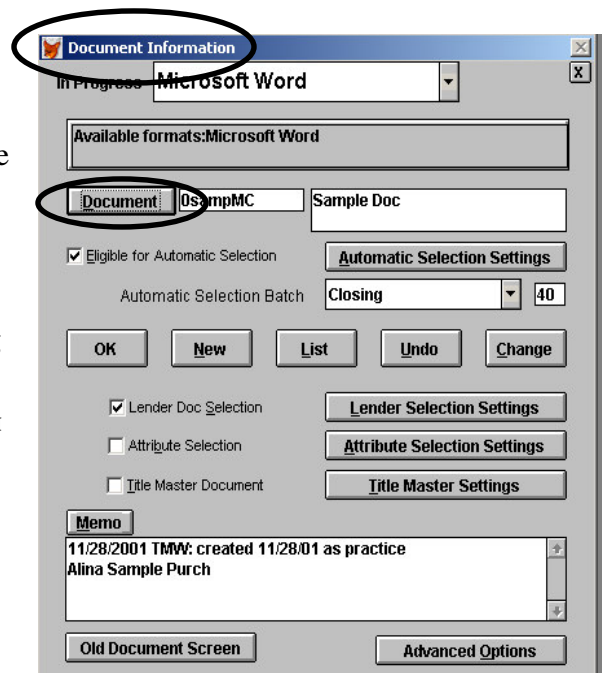
The first column in the **Choose a Document** window lists the document name and the second column provides a description of the document.

Document	Descript	Dtype	MW	WP	Batch	Docnum	Docuse
FN2MMtCT	FNMA 2nd Mtg Mtg #3807CT	MW	mw	wp	40	3807	
FN2MMtMA	FNMA 2nd Mtg #3822MA	MW	mw	wp	40	3822	
FN2MMtNH	FNMA 2nd Mtg #3820 NH	MW	mw	wp	40	3822	
FN2MMtRI	FNMA 2nd Mtg Mtg #3840RI	MW	mw	wp	40	3840	
FN2MNtCT	FNMA 2nd Mtg Note #3907CT	MW	mw	wp	40	3907	Note
FN2MNtMA	FNMA 2nd Mtg Note #3922MA	MW	mw	wp	40	3922	Note
FN2MNTNH	FNMA 2nd Mtg Note #3922 NH	MW	mw	wp	40	3822	Note
FN2MNtRI	FNMA 2nd Mtg Note #3940RI	MW	mw	wp	40	3940	Note
FN2Mtest	?FNMA 2nd Mtg #3822MA	MW	mw	wp	40	3822	
FNAffRI	Fannie Mae Affidavit RI	WP		wp	40		
FNAgreNY	FNMA Agreement for NY	WP		wp	40		
FNAgrNY	FNMA Agreement - NY	WP		wp	40		
FNBalRdr	FNMA Balloon Rider #3180	MW		wp	40		Rider
FNBB51AR	5-1 Adj Rate Mtg Disclosure	WP		wp	40		
FNBBARIn	Autho to Release Info	WP		wp	40		
FNBBCFlo	Cert of Flood Insurance	WP		wp	40		
FNBBCoCh	Convntl Doc Check List	WP		wp	40		
FNBBCong	CONGRATULATIONS!	WP		wp	40		
FNBBCoPu	Convnt'l Purchase Conditions	WP		wp	40		
FNBBFIM	Fire Insurance Memo	WP		wp	40		

[Select] [Browse] [Copy] [Top] [Bottom] [Find] [Delete] [Exit]

To create a new buyer letter based on the existing buyer letter (**LtBrwPur**), find the entry for **LtBrwPur** document, click the document and click the Select button twice. This will retreive the name of the document into the Document Information window (below).

2. **Adding a new document to the system.**

Click the **New** button in the **Document Information** window to open the **Create a New Document** window.

NOTE: To search for a listing in the document database or any other database, press **<Ctrl>F** and enter the term you wish to search on. (Selecting **Wrap Around** will allow the search to continue at the top of the list once it has reached the bottom.) To find the next occurrence of your search term, use **Ctrl-G**.

In the **Create Document** field enter the name of the new document you are creating and press the tab key. In this example, enter **MyBrwLtr.**

NOTE: You may use a maximum of 8 letters when naming a document.

The **Copy Selection, etc**. field automatically fills in the name of the new document being copied from. In this example **LtBrwPur** will fill in.

Press the <Tab> key and the **Copy Document File from** field fills in and displays the document path of the document to be copied.

Click **OK** when finished.

If your copy of Standard Conveyancer has any lenders with lender document selections, the system will show you the lender document selection list for the document you are creating.

You need not do anything here.

For more information see the text box below.

?	Document	Ldstatus	Lender File	Priority	Form	Ldversion	Lddteadd	Lddtype
Y	MyBrwLtr	20	ABC 4 BANK		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Booker Bank		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Brian's Lender		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Cash		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Citizens		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Freedom-Count		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	JS Lender		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	JS-RR		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Julie's Lender		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	LDS Test Lend		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Lender ID		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	MMI-WaMu		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Mort Spec - Ea		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Nelson		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	New Lender rer		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	ORG-INV Doc		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Stellato		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	TEST example		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Test Again		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Test Org-Inv		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	This is my Lenc		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Tina's Lender		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	Webster First F		Letter	0	04/21/2000	MW
Y	MyBrwLtr	20	XYZ Bank		Letter	0	04/21/2000	MW

Select | Browse | Copy | Top | Bottom | Find | Delete | Exit

Lender Document Selection is a feature that allows you to set a reduced document selection list on a lender-by-lender basis, for lenders that require you to produce only a reduced document package.

The **Lender Document Selection** window displays a list of all lenders that have a Lender Document Selection list. The first column contains either a **Y**, which indicates that the document being customized will appear in the print batch for that lender, or an **N**, which indiates that the document will NOT appear in the print batch for that lender.

The second column lists the name of the newly created document. In this example, **MyBrwLtr** and the third column lists the print batch in which the document will appear. In this example, the document will appear in the New File batch which is batch #20.

Press <Esc> to return to the **Document Information** window.

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3. Customizing the new document you have added to the system.

At this point you have added a new document listing called MyBrwLtr. You now need to customize the actual Word document from the copy of LtBwrPur that was created when you added your new document. You also need to choose the print batch settings for the document.

The **Document** field contains the name of the newly created document - **MyBrwLtr**. Tab to the next field and enter a descriptive name of the customized document – **My Borrwer Letter – Purchase.**

Click the **Change** button and click **Save** to save changes to MyBrwLtr. Microsoft Word will open the document you are customizing.

To view the merge fields in the document click the **Fields** button or to view the data in the document click the **Data** button located on the toolbar. **NOTE**: All modifications should be made in the "Fields" View so merge codes are not accidentally deleted.
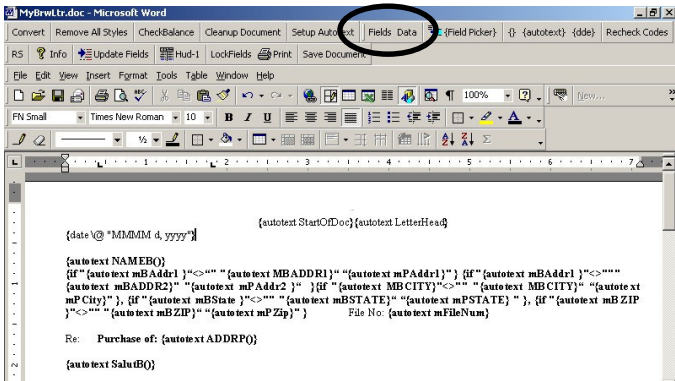
Here is an example of MyBrwLtr in **Field View**. If the fields were accidentally deleted, this document would no longer be usable.

Clicking into a field turns the entire field gray and can be useful to see how long the field is. Some fields can consist of entire parpagraphs.

It is okay to modify the TEXT within a document, but do NOT delete the data fields unless you do not want that information pulling into the document.
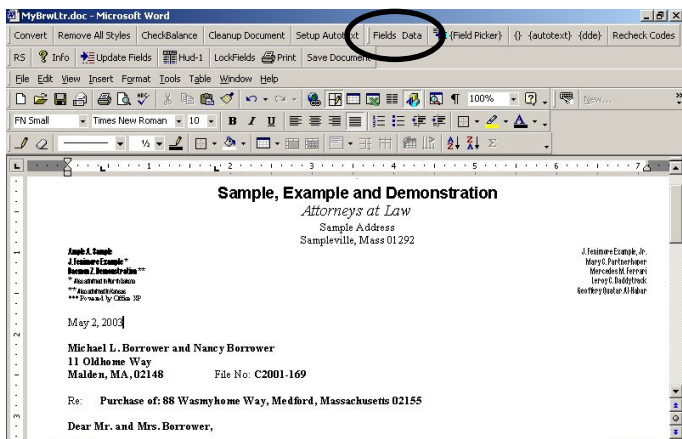
Here is an example of MyBrwLtr in **Data View**. Notice the information contained in this letter is in readable form. **Do NOT modify document templates in Data View.**

ALWAYS customize data fields in the "FIELD" view, not in the "DATA" view.

If the document you selected does not contain all the fields required to modify your Word document, merge fields can be added to the document. To add a merge field to the document, place the cursor in the position where the merge field is to be added and click the {**Field Picker** } button. The **Form Field Picker** window opens.
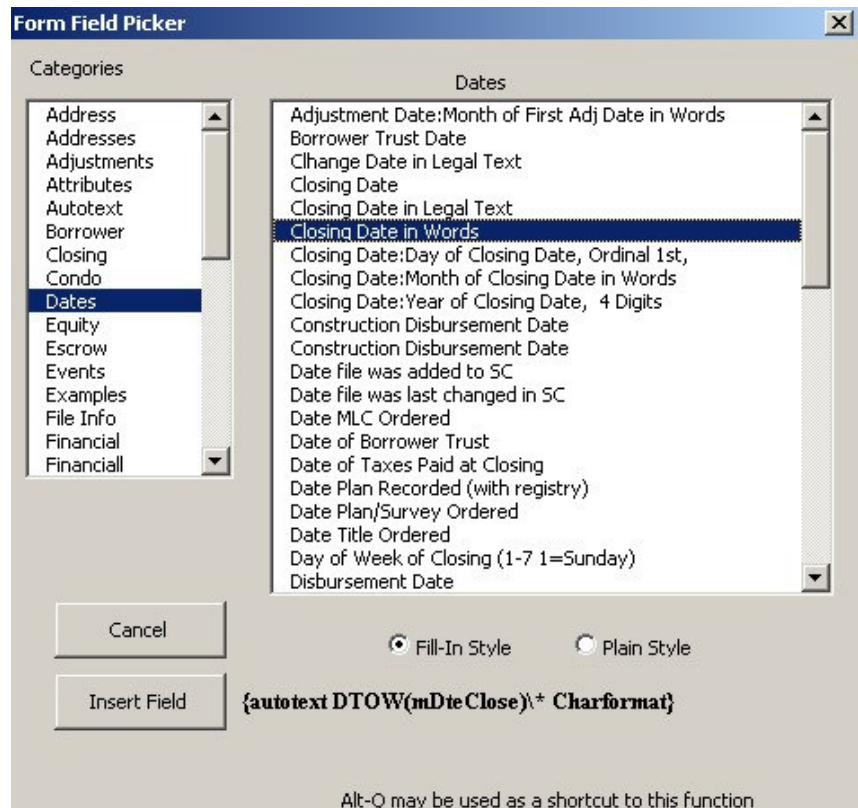
The **Form Field Picker** window contains a list of mwfields and is arranged by **Categories**.

Example: To insert the closing date into the document you are creating, click on Dates in the **Categories** column and make the appropriate selection.
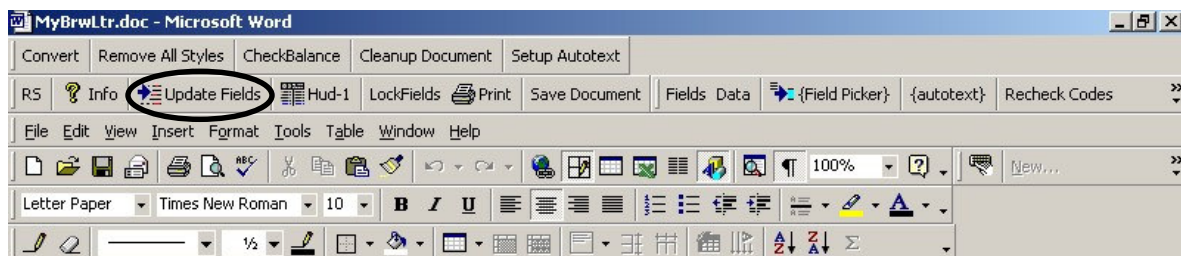
NOTE: There are several options for the closing date. The closing date can be numeric, or in legal text or in words, etc. Click on the appropriate selection and the **Insert Field** button becomes activated.

The merge field appears in bold type next to the **Insert Field** button and the newly inserted merge field will appear in the document being created.

Close the **Form Field Picker** window by clicking on the "X" in the top right corner of the window.

Form Field Picker

Categories

Address
Addresses
Adjustments
Attributes
Autotext
Borrower
Closing
Condo
Dates
Equity
Escrow
Events
Examples
File Info
Financial
Financiall

Dates

Adjustment Date:Month of First Adj Date in Words
Borrower Trust Date
Clhange Date in Legal Text
Closing Date
Closing Date in Legal Text
Closing Date in Words
Closing Date:Day of Closing Date, Ordinal 1st,
Closing Date:Month of Closing Date in Words
Closing Date:Year of Closing Date, 4 Digits
Construction Disbursement Date
Construction Disbursement Date
Date file was added to SC
Date file was last changed in SC
Date MLC Ordered
Date of Borrower Trust
Date of Taxes Paid at Closing
Date Plan Recorded (with registry)
Date Plan/Survey Ordered
Date Title Ordered
Day of Week of Closing (1-7 1=Sunday)
Disbursement Date

Cancel

Insert Field

⦿ Fill-In Style   ◯ Plain Style

{autotext DTOW(mDteClose)* Charformat}

Alt-Q may be used as a shortcut to this function

Once the merge fields have been inserted in the new document click the **Update Fields** button. If you had previously opened a file, the data from that file will pull into the document being customized. If you did not have a file open there will not be any data to pull into the document being customized.

MyBrwLtr.doc - Microsoft Word

Convert | Remove All Styles | CheckBalance | Cleanup Document | Setup Autotext

RS | Info | Update Fields | Hud-1 | LockFields | Print | Save Document | Fields Data | {Field Picker} | {autotext} | Recheck Codes

File Edit View Insert Format Tools Table Window Help

Letter Paper | Times New Roman | 10 |

Saving your Template

BEFORE exiting Word, click File, then Save Document to save your changes.