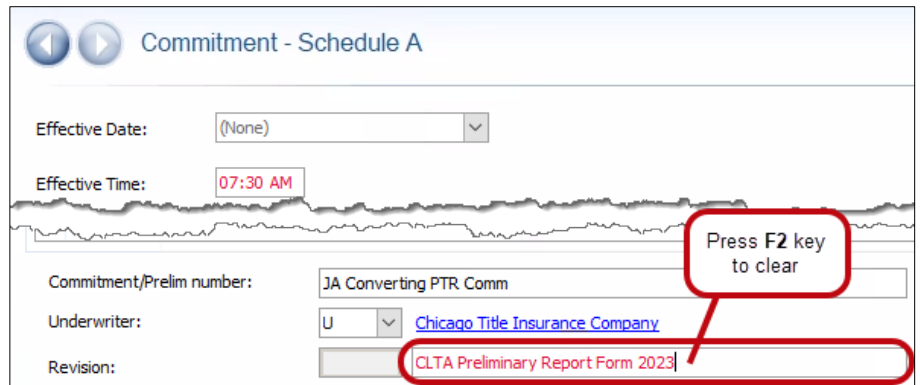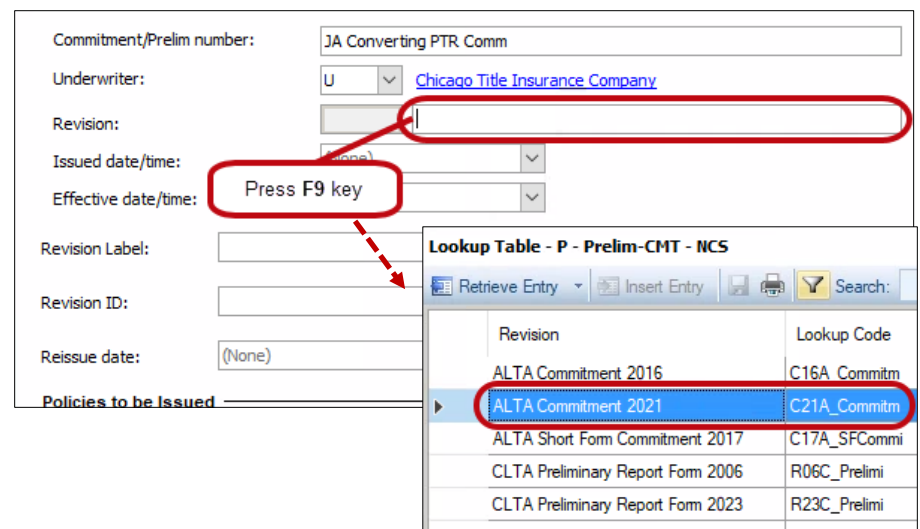Follow these steps to convert a prelim to a commitment.

1. Navigate to the **Commitment – Schedule A** screen

2. Click in the **Revision** field

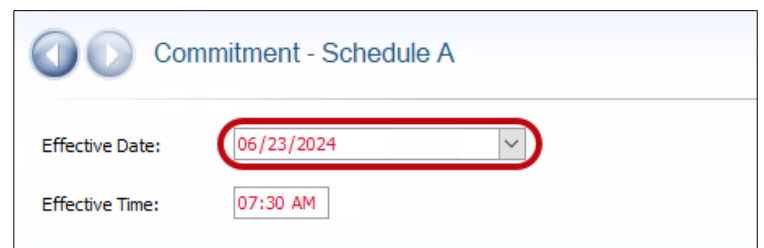3. Press the **F2** key to clear **CLTA Preliminary Report Form 2023**



4. Press the **F9** key to open the **Lookup Table**

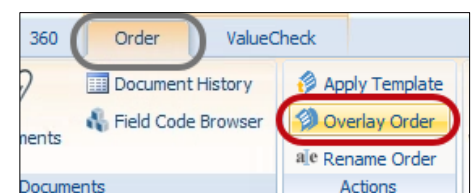5. Double-click the **ALTA Commitment 2021** entry



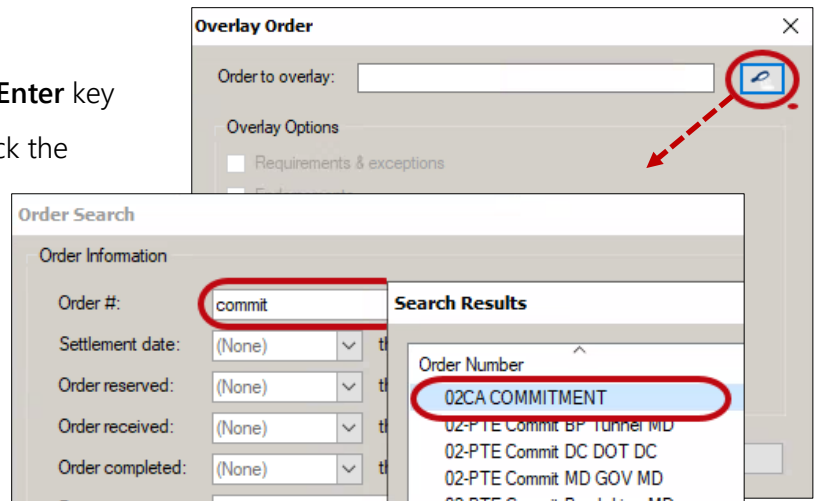Once returned to the **Commitment – Schedule A** screen,

6. Change the **Effective date** entry, if needed



## Adding Requirements/Exceptions from the Template

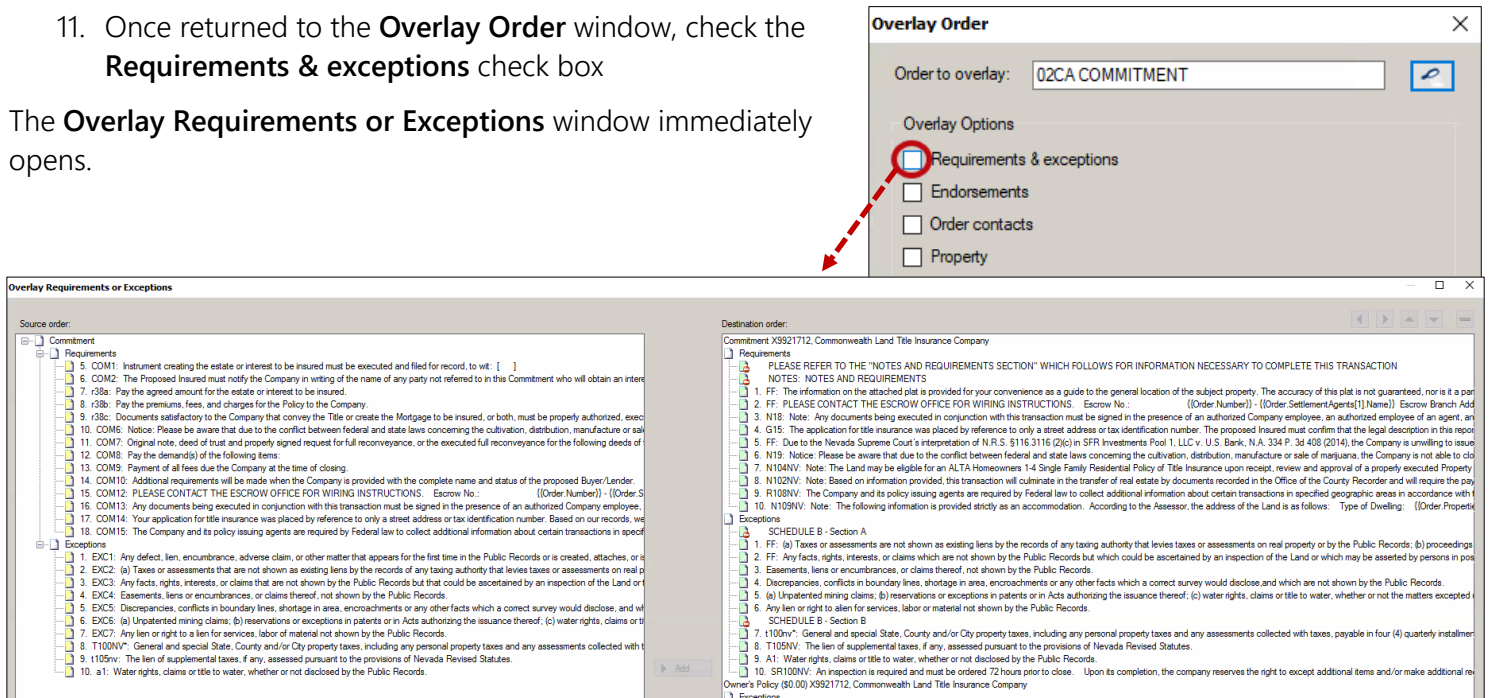7. From the **Order** ribbon, click the **Overlay Order** button

Dated: 07.02.2024

8. Click the **Search** [icon] icon

9. In the **Order #** field, enter *commit*; press the **Enter** key

10. From the **Search Results** window, double-click the applicable Commitment template

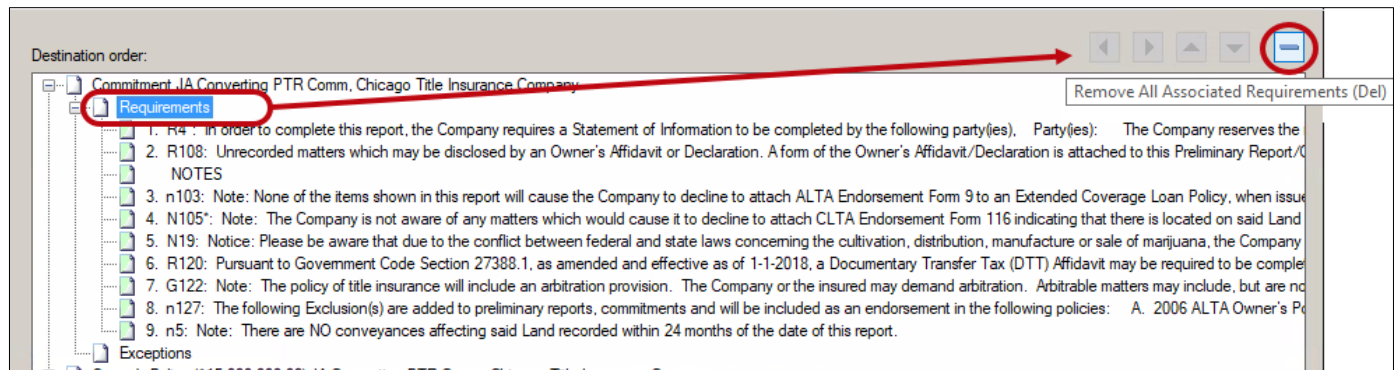

11. Once returned to the **Overlay Order** window, check the **Requirements & exceptions** check box

The **Overlay Requirements or Exceptions** window immediately opens.
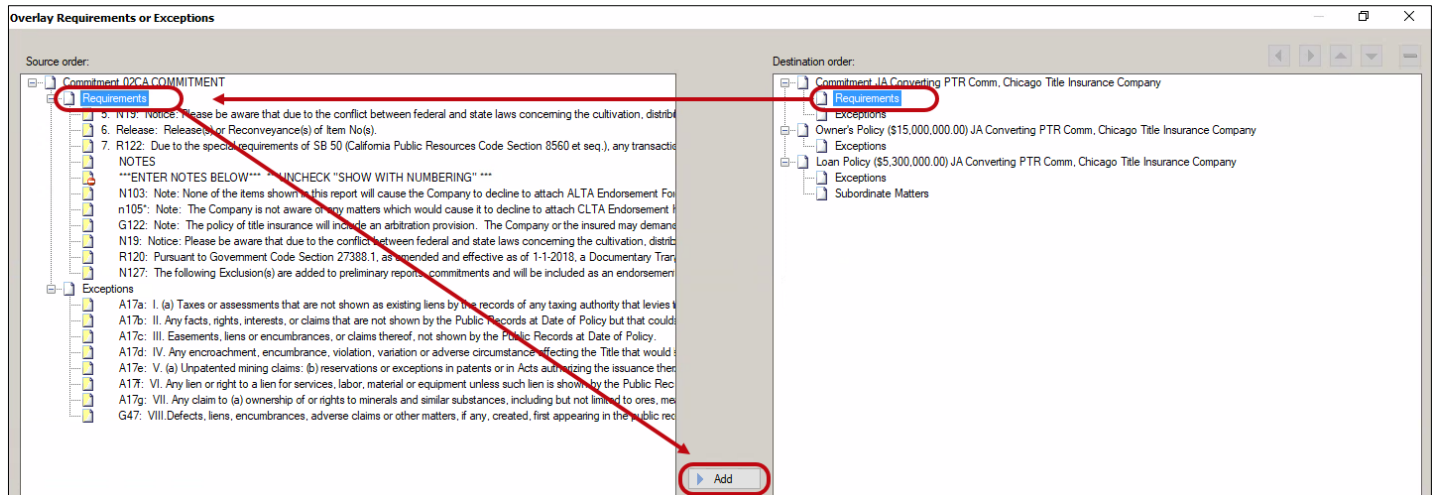




12. In the **Destination order** section (right side), select the **Requirements** entry

13. Click the **Remove Requirements** [icon] icon; this removes all associated requirements
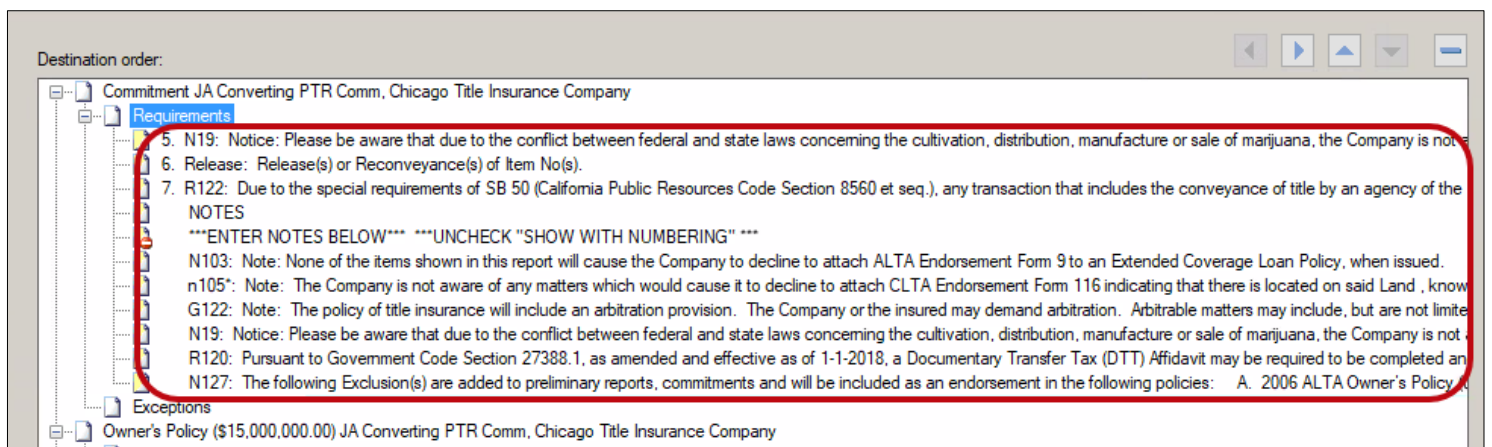
14. Click **Yes** to confirm removal

15. While still in the **Destination order** section, select the **Requirements** entry

16. In the **Source order** (left side), select the **Requirements** entry
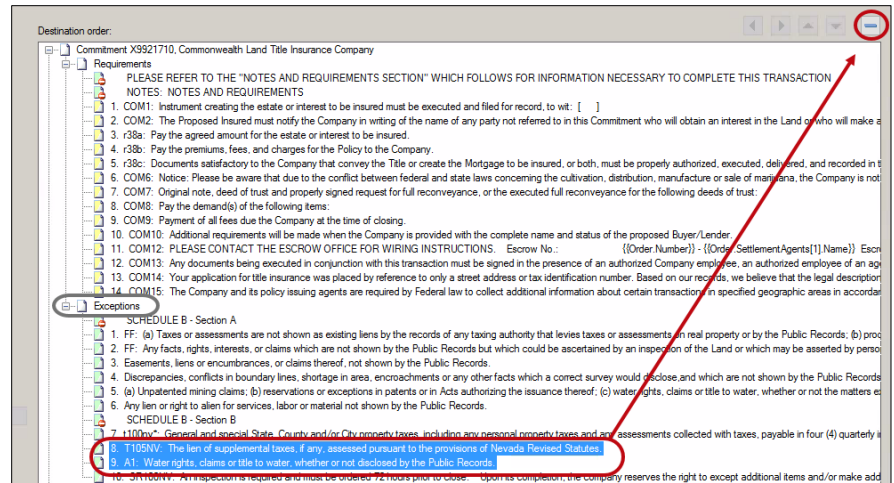
17. Click the **Add** button



All Requirements from the template are added to your order below the **Requirements** entry.
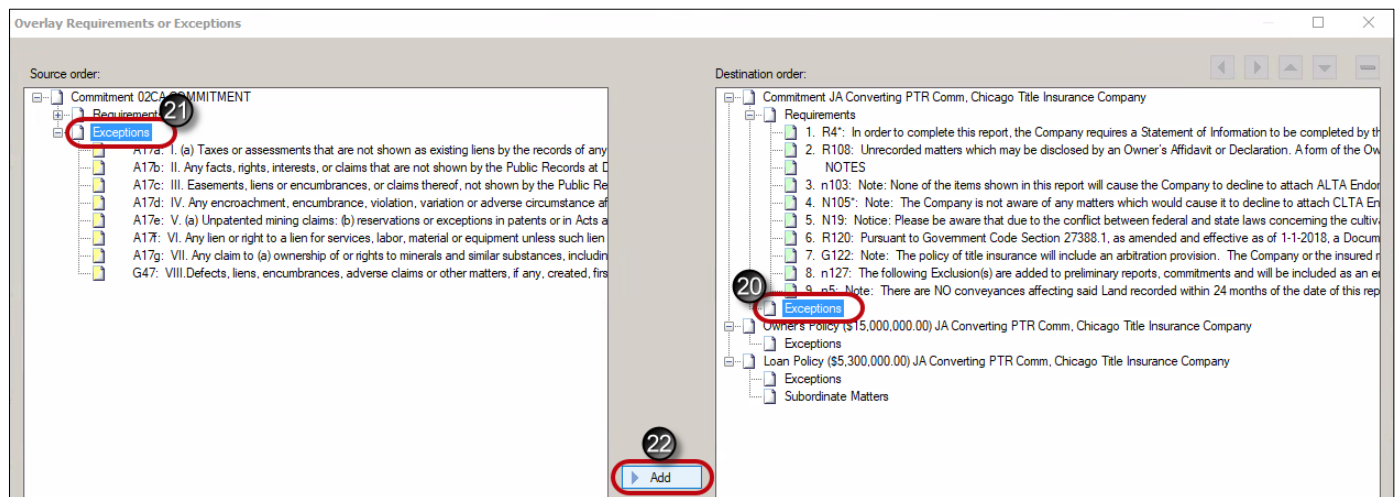
18. Review the **Exceptions** in the **Destination order** section for duplicates or unwanted entries if needed

19. Highlight and click the **Remove Exceptions** icon to remove as needed; click **Yes** to confirm removal



20. While still in the **Destination order** section, select the **Exceptions** entry

21. From the **Source order**, select the **Exceptions** entry
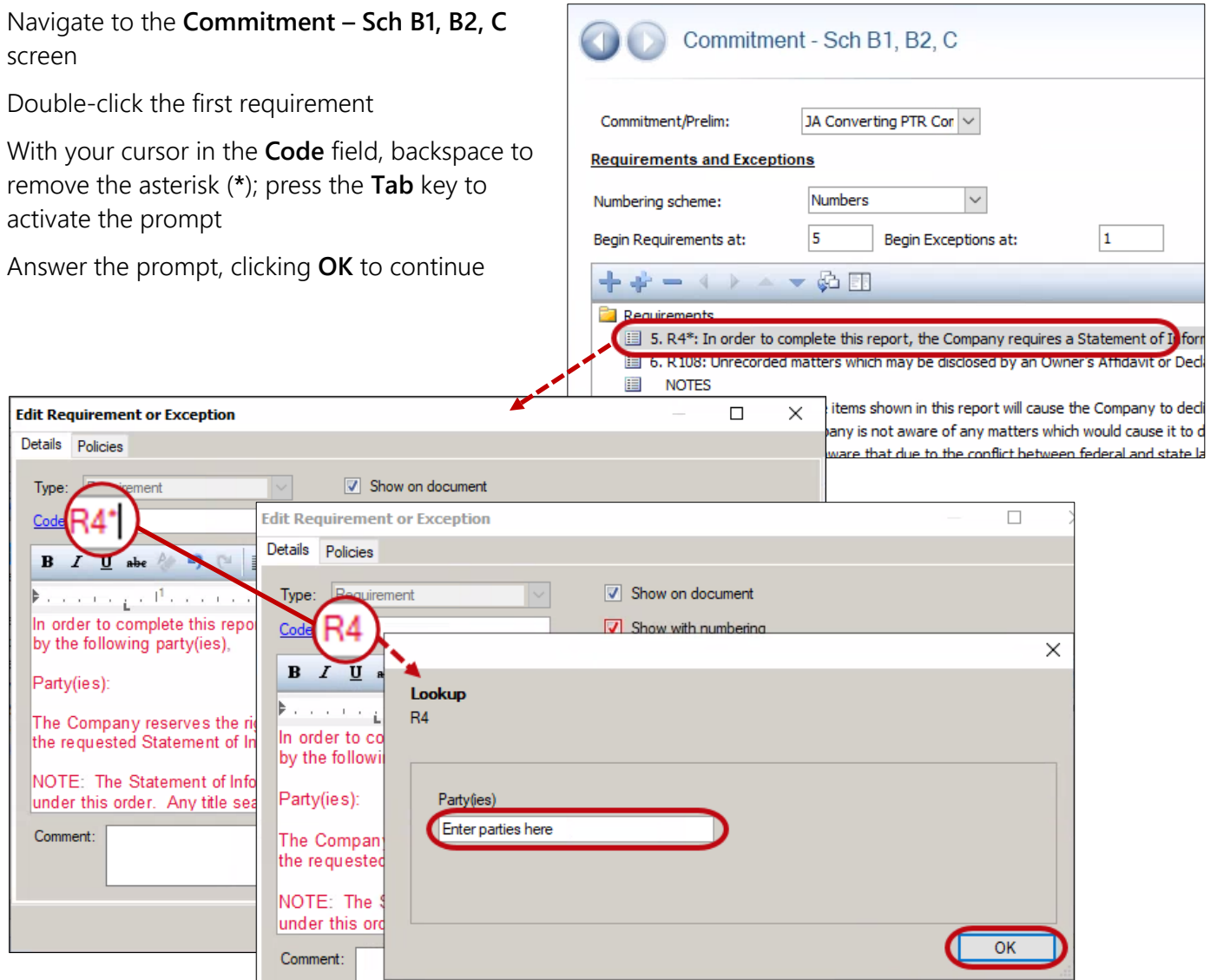
22. Click the **Add** button



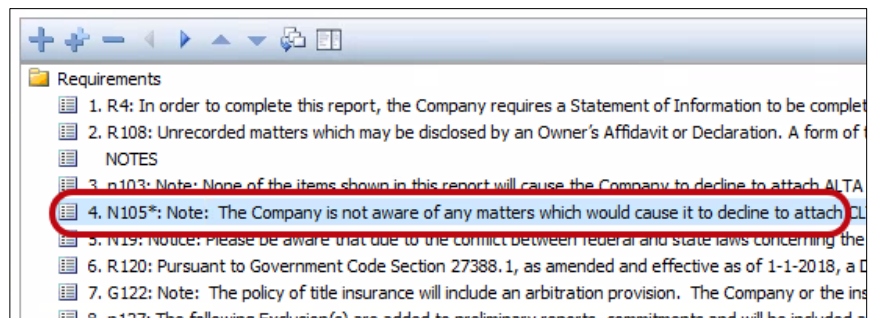The exceptions are copied from the template to the **Destination order Exceptions**.

23. Click the **OK** button to close the **Overlay Requirements or Exceptions** window

24. Click the **OK** button to close the **Overlay Order** window

25. Click **OK** to confirm completion

## Updating Added Requirements

1. Navigate to the **Commitment – Sch B1, B2, C** screen

2. Double-click the first requirement

3. With your cursor in the **Code** field, backspace to remove the asterisk (**\***); press the **Tab** key to activate the prompt

4. Answer the prompt, clicking **OK** to continue



5. Click the **OK** button to close the **Edit Requirement or Exception** window

6. Locate and double-click the **N105\*** requirement
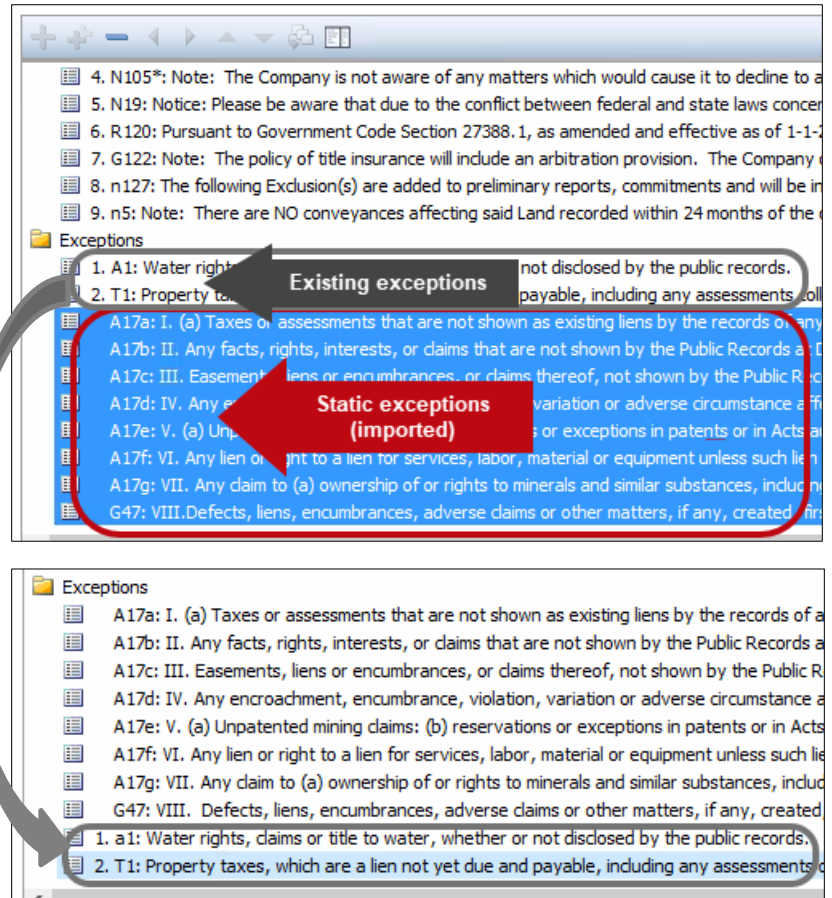
7. Repeat **steps 3-5**



8. Add any additional requirements or exceptions as needed
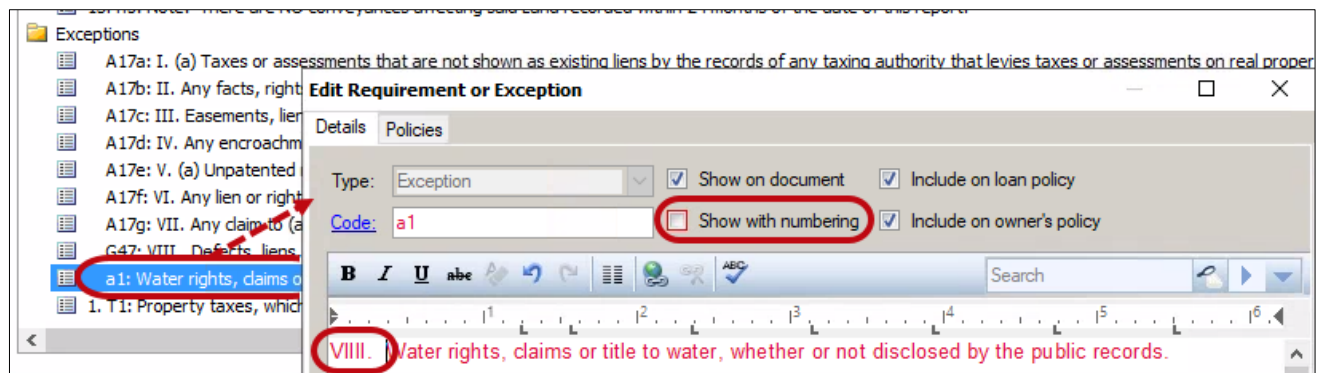
## Updating Exception Numbering

When exceptions are imported from the template you may notice the numbering is not sequential with exceptions in the destination order. You can update the numbering sequence of the existing exceptions as follows.

1. Highlight one of the existing exceptions (i.e., 1, 2, etc.)

2. Using the **Down arrow** on the toolbar, move it below the last static exception

3. Repeat **steps 1-2** until all of the existing exceptions are shown below the static exceptions



Once the exceptions are moved,

4. Double-click the first moved exception

5. Uncheck the **Show with numbering** check box

6. Edit the exception to add the next roman numeral in the sequence; click **OK**

7. Repeat **steps 4-6** for each exception as needed

### Generating the Commitment

8. Click the **Documents** button

9. Expand the **Title Products > Commitments & Prelims > Commitments** folder

10. Double-click the **ALTA Commitment 2021 (CA)** document to select

11. **Preview/Publish** the document