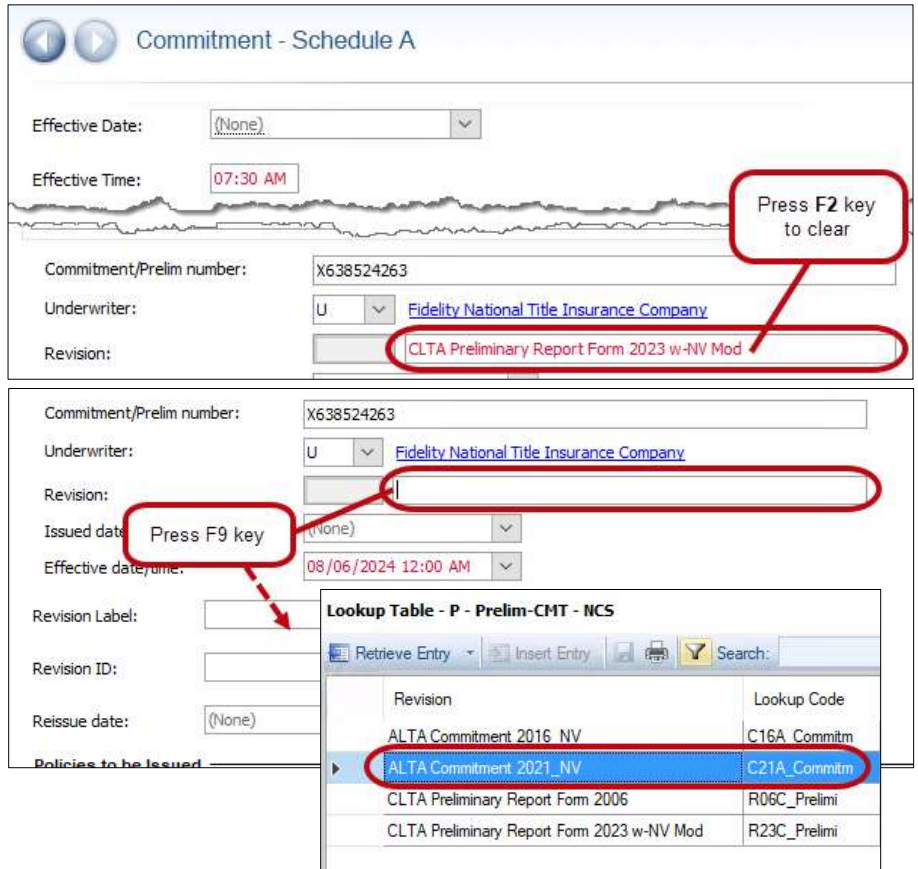


Converting a Prelim to a Commitment

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 w-NV Mod**
4. Press the **F9** key to open the **Lookup Table**
5. Double-click the **ALTA Commitment 2021-NV** entry



The screenshot shows the 'Commitment - Schedule A' screen. The 'Revision' field contains 'CLTA Preliminary Report Form 2023 w-NV Mod'. A red circle highlights this field with a callout 'Press F2 key to clear'. Below, the 'Revision' field is empty, and a red circle highlights it with a callout 'Press F9 key'. A 'Lookup Table - P - Prelim-CMT - NCS' is displayed, showing a table with 'Revision' and 'Lookup Code' columns. The entry 'ALTA Commitment 2021-NV' is highlighted in blue, with a red circle around it and a callout 'C21A Commitm'.

Revision	Lookup Code
ALTA Commitment 2016 NV	C16A Commitm
ALTA Commitment 2021-NV	C21A Commitm
CLTA Preliminary Report Form 2006	R06C_Prelimi
CLTA Preliminary Report Form 2023 w-NV Mod	R23C_Prelimi

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

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



The screenshot shows the 'Commitment - Schedule A' screen. The 'Effective Date' field is highlighted with a red circle and contains '08/30/2024'. The 'Effective Time' field contains '07:30 AM'.


Adding Requirements/Exceptions from the Template

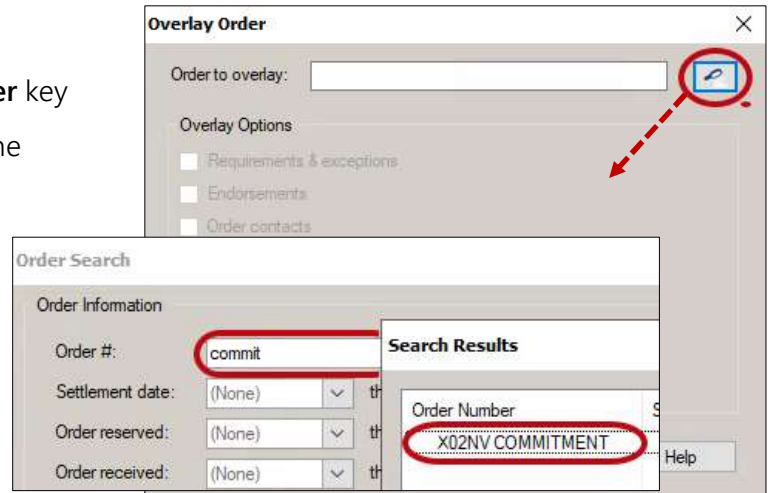
7. From the **Order** ribbon, click the **Overlay Order** button



The screenshot shows the 'Order' ribbon. The 'Overlay Order' button is highlighted with a red circle. Other buttons visible include 'ValueCheck', 'Document History', 'Field Code Browser', 'Apply Template', 'Rename Order', and 'Actions'.

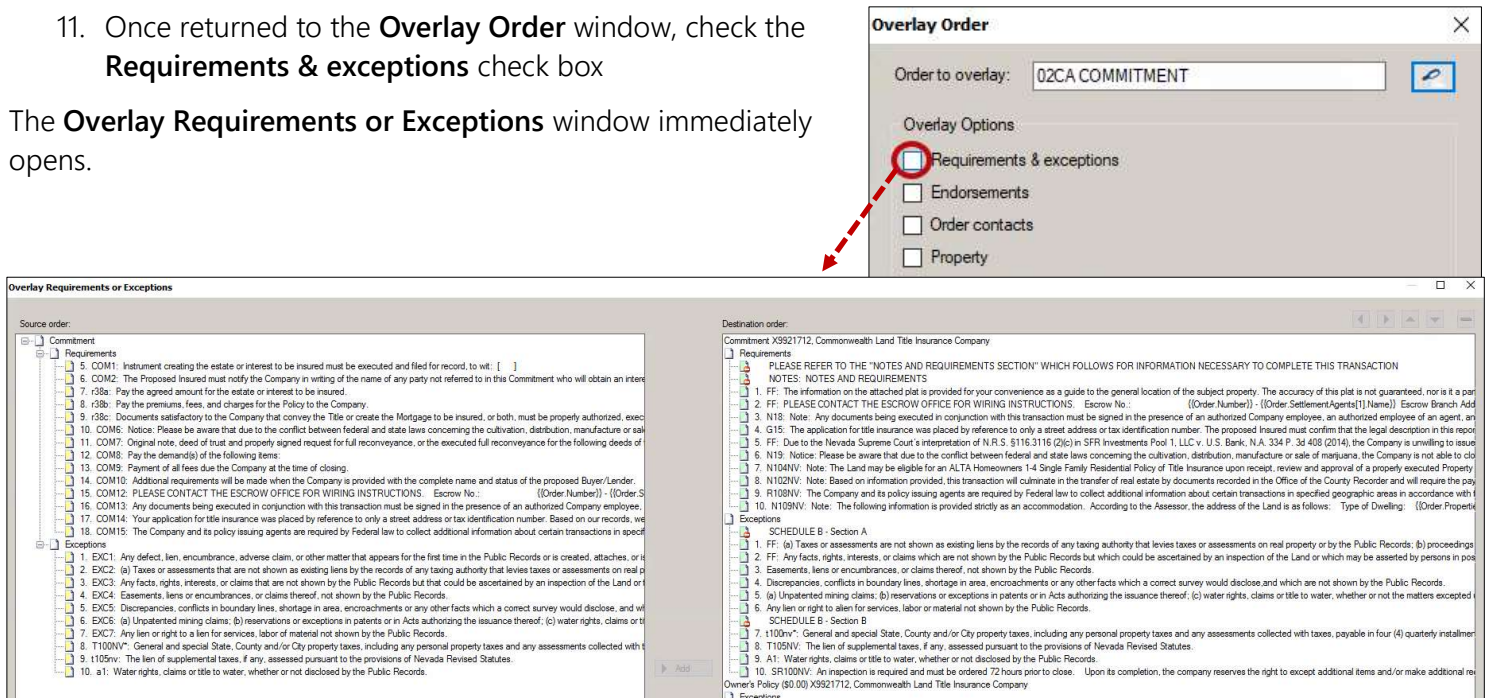
Converting a Prelim to a Commitment


8. Click the **Search**  icon
9. In the **Order #** field, enter *commit*; press the **Enter** key
10. From the **Search Results** window, double-click the **Commitment** template



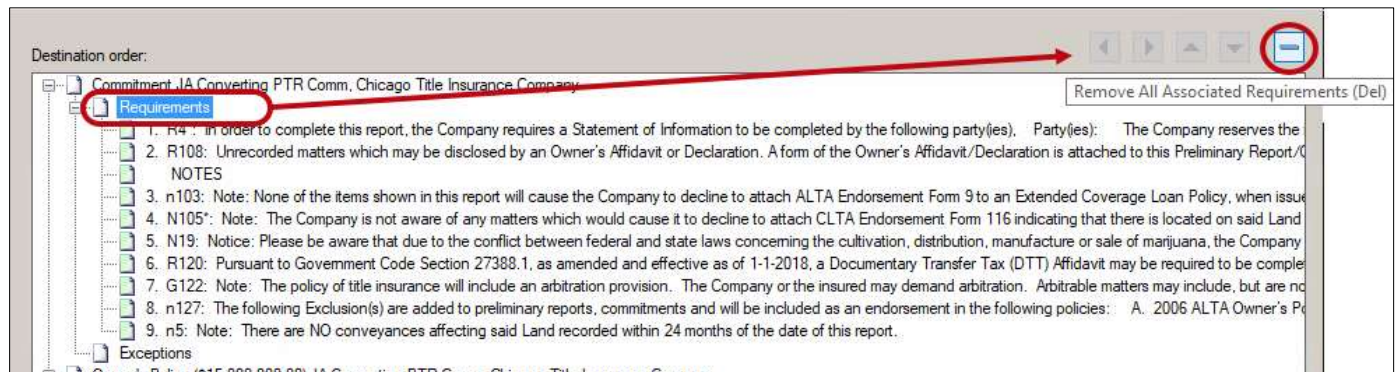
11. Once returned to the **Overlay Order** window, check the **Requirements & exceptions** check box

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; this removes all associated requirements
14. Click **Yes** to confirm removal

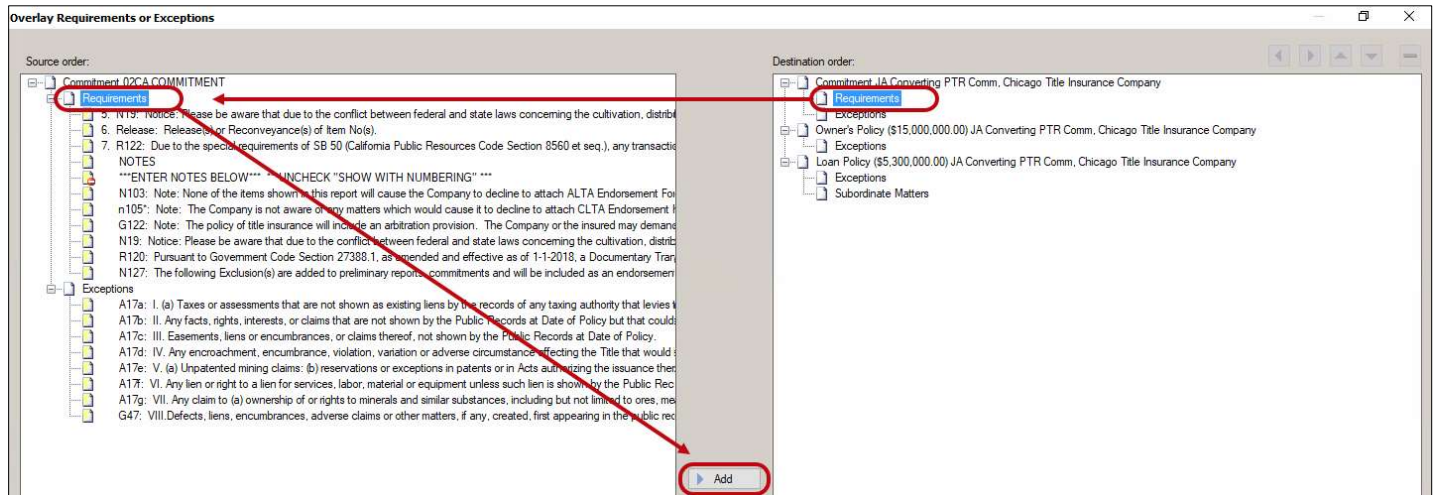
Converting a Prelim to a Commitment



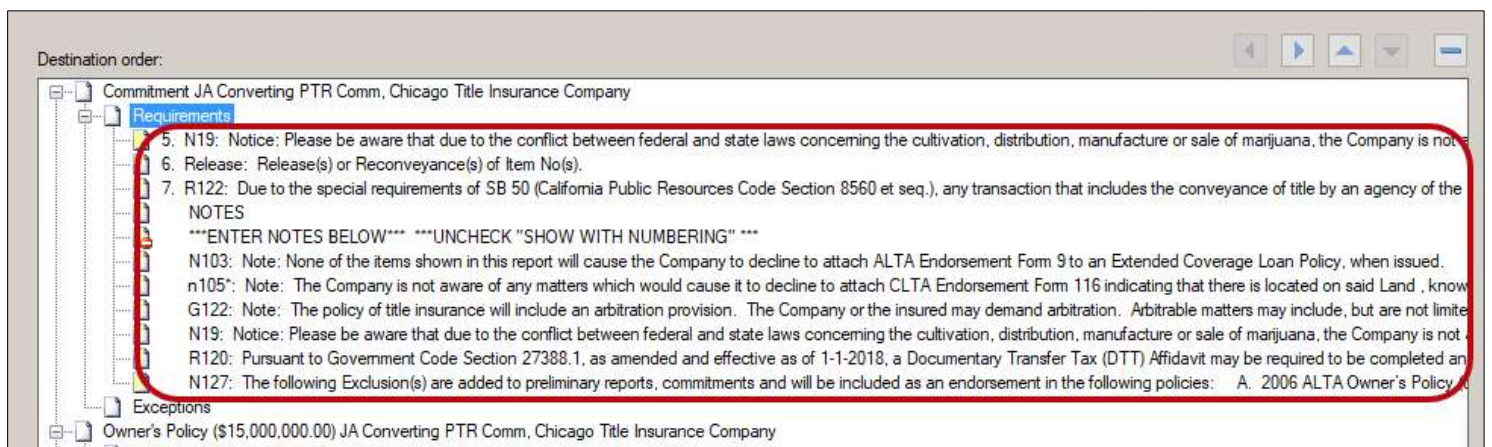
15. While still in the **Destination order** section, select the **Requirements** entry

16. In the **Source order** (left side), select the **Requirements** entry


17. Click the **Add** button

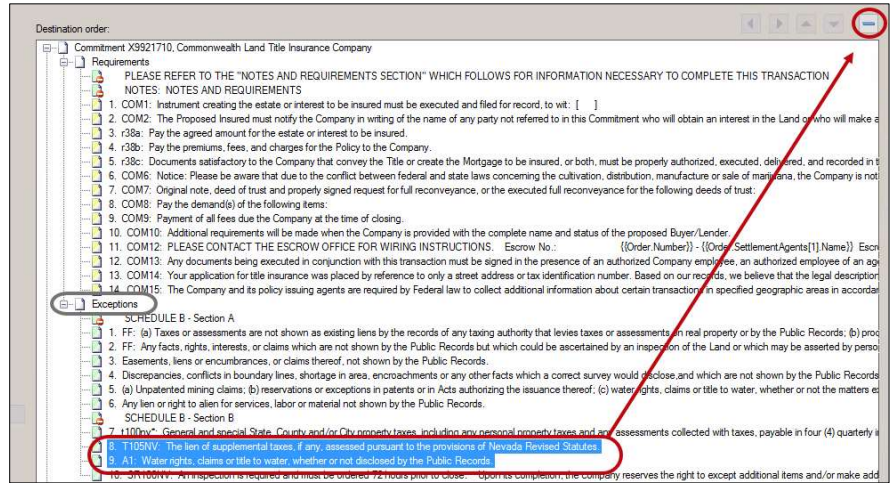


All Requirements from the template are added to your order below the **Requirements** entry.

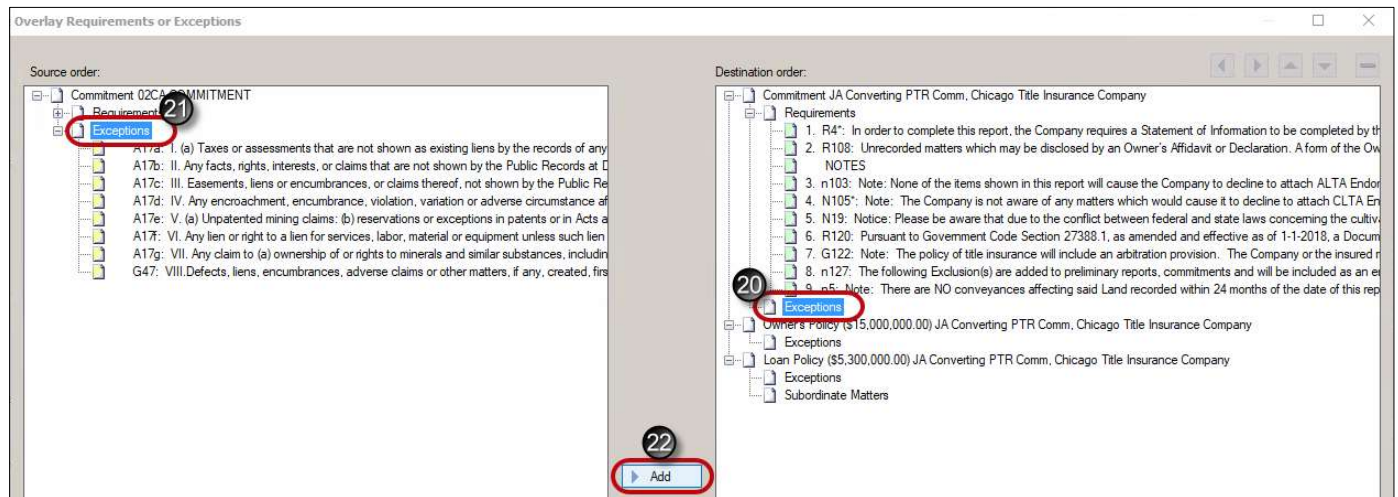


Converting a Prelim to a Commitment

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



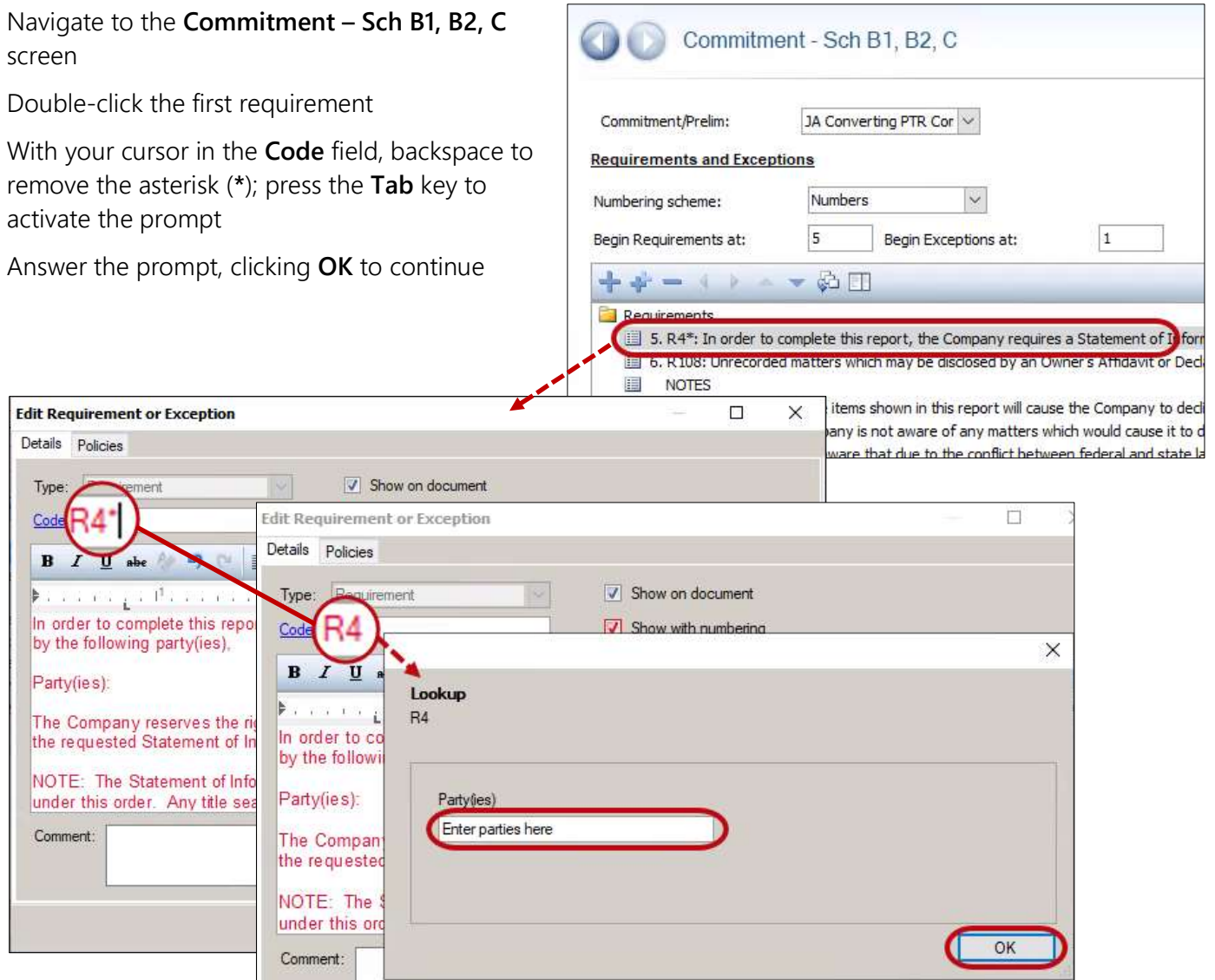
The exceptions are copied from the template to the **Destination order Exceptions**.

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

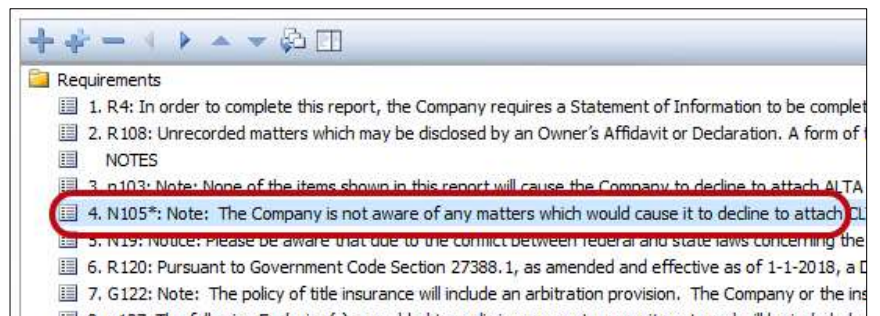
Converting a Prelim to a Commitment

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**




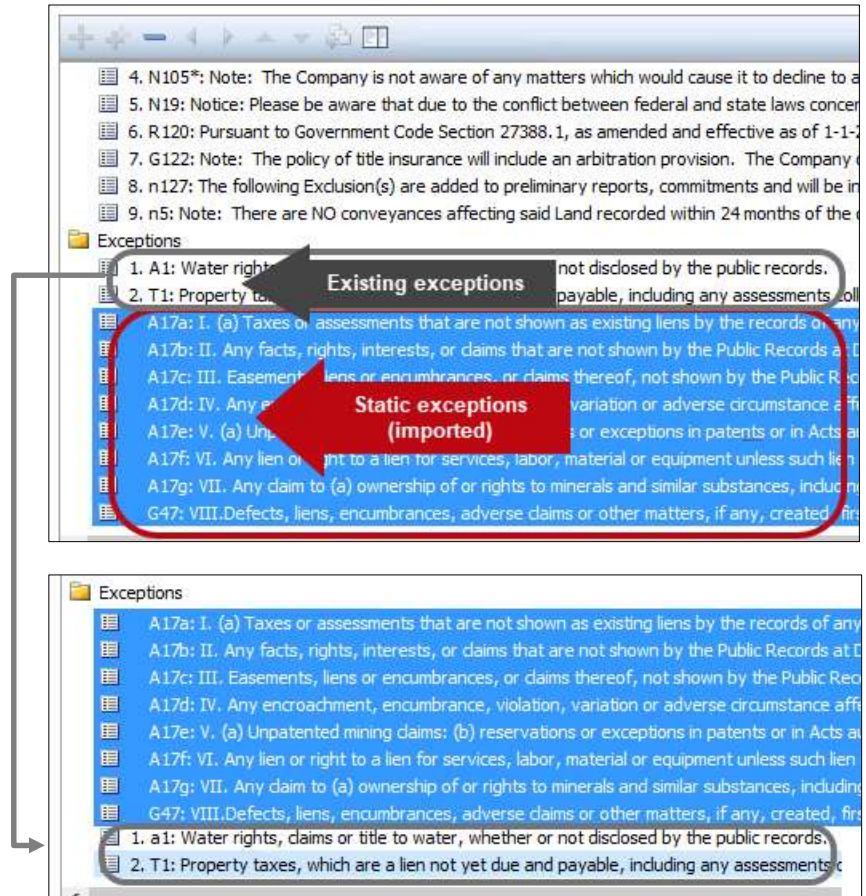
8. Add any additional requirements or exceptions as needed

Converting a Prelim to a Commitment

Updating Exception Numbering

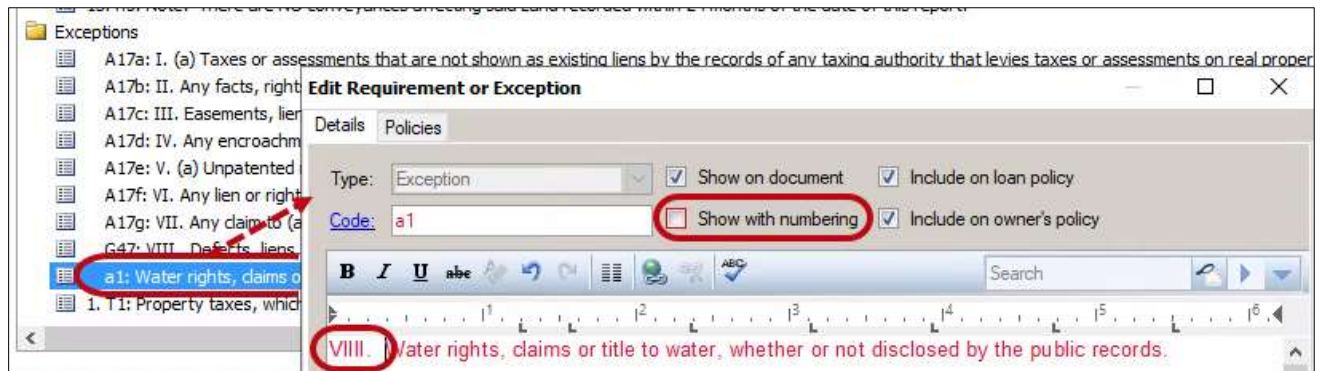
When exceptions are imported from the template you may notice the numbering is not sequential with exceptions in the destination order. You can update the numbering sequence of the existing exceptions as follows.

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

