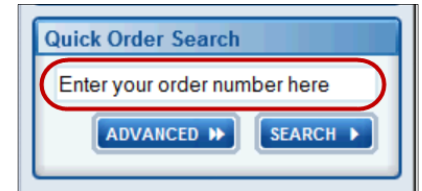Follow these steps to prepare the Title Commitment using the *Mark Up Coversheet – Title Products* and supporting documentation.
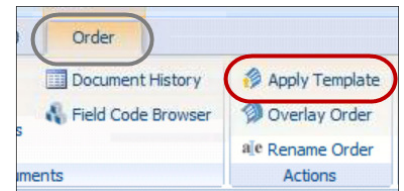
Start Page Tab

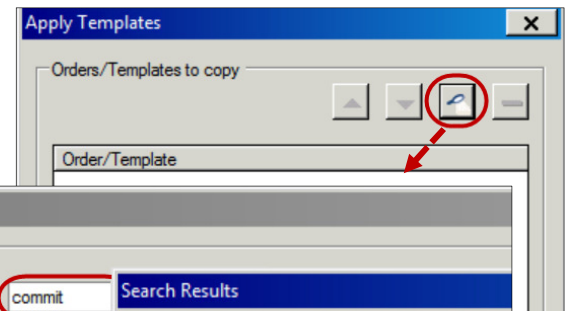❑ In the **Quick Order Search** field, enter the order number; press the **Enter** key
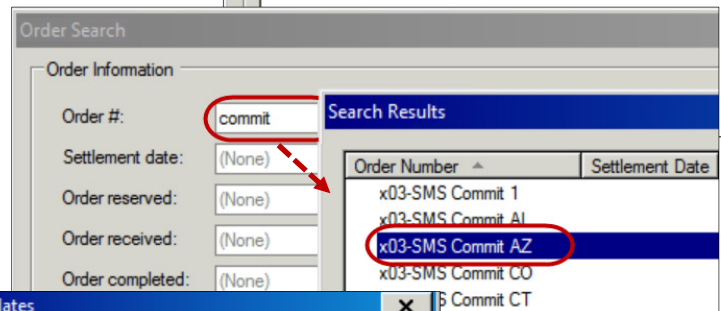

Apply the Template

❑ Apply the applicable template

1. From the **Order** ribbon, click the **Apply Template** button

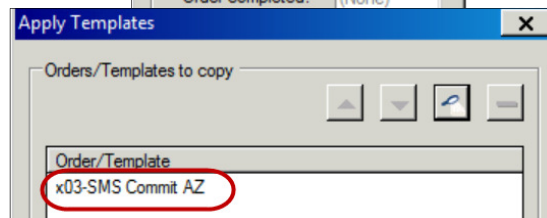2. From the **Apply Templates** window, click the **Search** icon

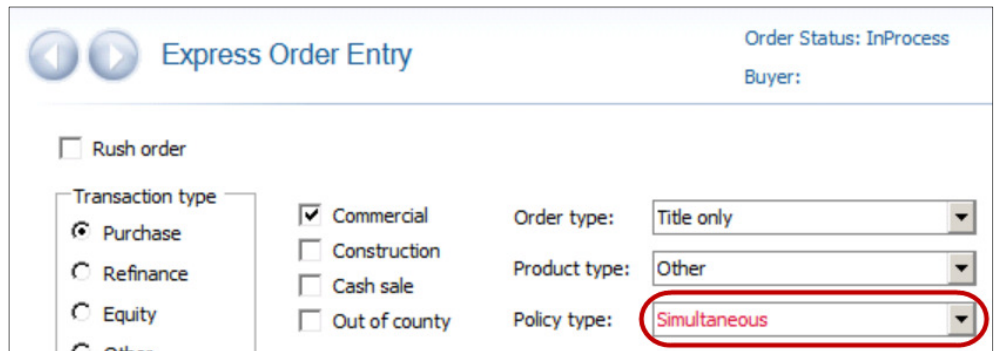3. In the **Order #** field, enter *commit*; press the **Enter** key
4. Double-click the applicable template

5. Click **OK** to apply
6. Click **OK** to confirm template has been applied

Order Entry screen

❑ Verify the **Policy type**
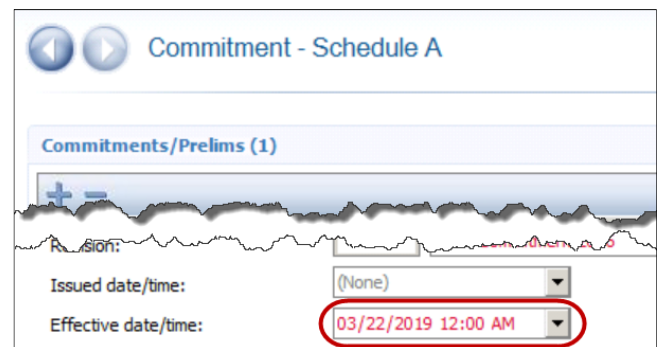
Commitment – Schedule A screen

❑ Enter the **Effective date/time**

❑ Enter Loan/Owner's Policy Information

1. Highlight the **Loan Policy** in the grid, enter (or verify) the information from the Mark Up Coversheet,

   a) **Policy lookup Code** - click the link to select the applicable policy from the **Lookup Table**

   b) **Coverage Amount –** verify the amount, if blank, enter

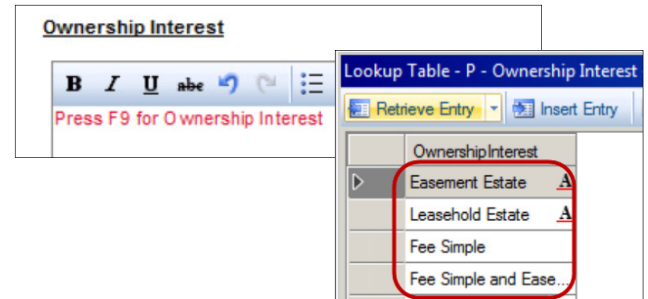   c) **Proposed Insured –** enter the insured

2. Highlight the **Owner's Policy** in the grid

   a) Repeat **Steps 1a-c** above

NOTE: It is important you are highlighting the policy in the grid **before** selecting/entering the corresponding policy information.

❑ In the **Ownership Interest** field,

1. Press the **F9** key
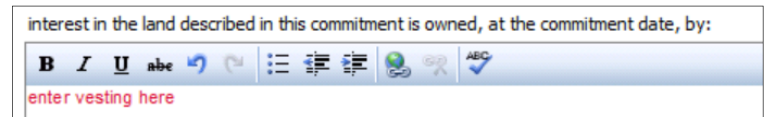
2. Double-click the applicable entry

❑ In the **interest in the land described. . .** field, enter vesting information

Title Legal Description screen

❑ In the **Preliminary Opinion/Commitment legal** field, enter the
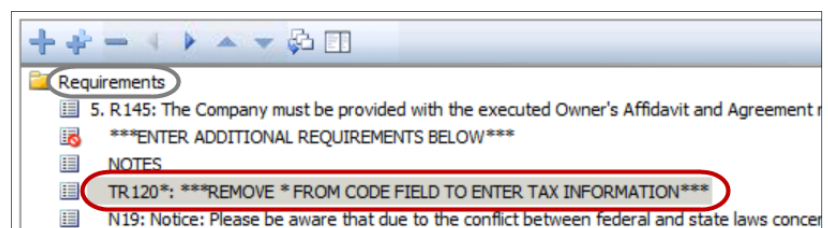
1. **Legal description**

2. **Being clause**

   a) Press the **Enter** key to enter a blank line after the legal description so your cursor is on a blank line

   b) Click the **Lookup code** link

   c) Highlight the applicable **Being Clause**

   d) Click the **Retrieve Entry (Appended)** button

   e) Answer prompts; click **OK** to continue

NOTE: If copying the legal description from another source, make sure to scrub the legal prior to pasting into your SoftPro order. Refer to the job aid, *Legal Descriptions – Scrubbing the Legal Description*, if needed.

Commitment – Schedule B1, B2 screen

❑ Enter Tax information

1. In the **Requirements** section, double-click the **TR120*** entry
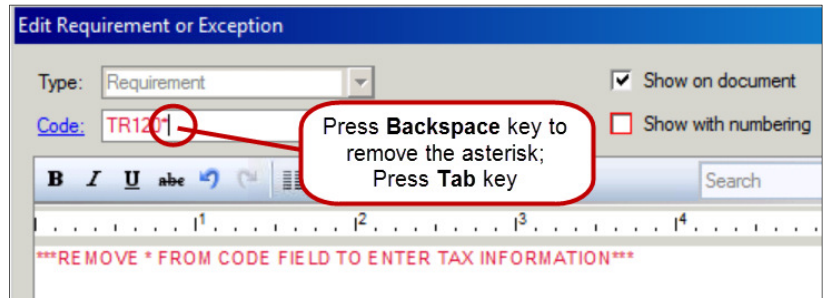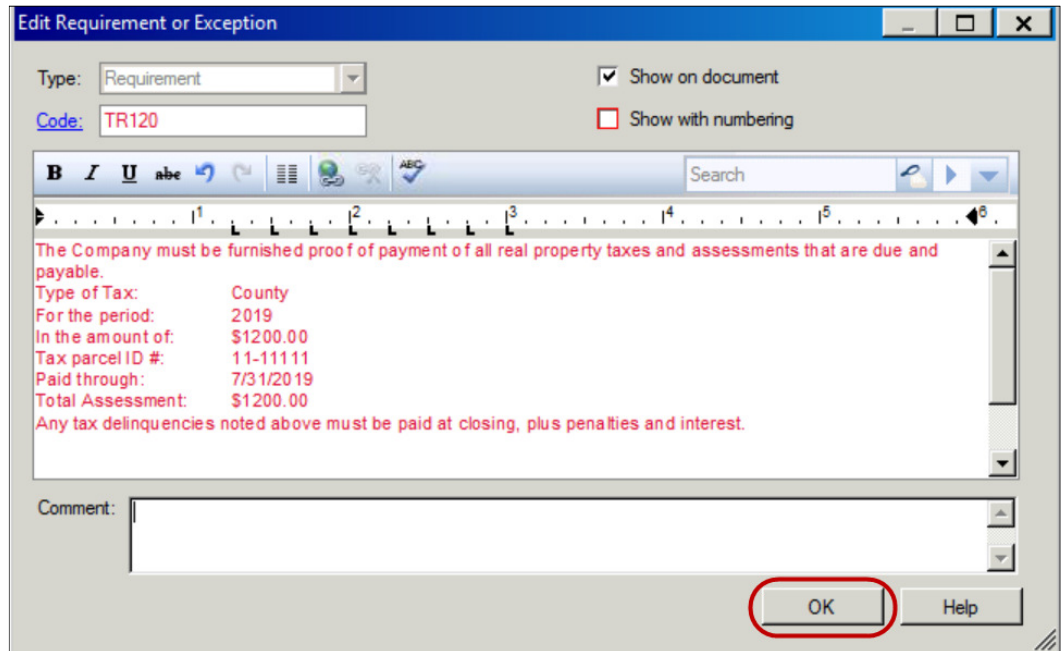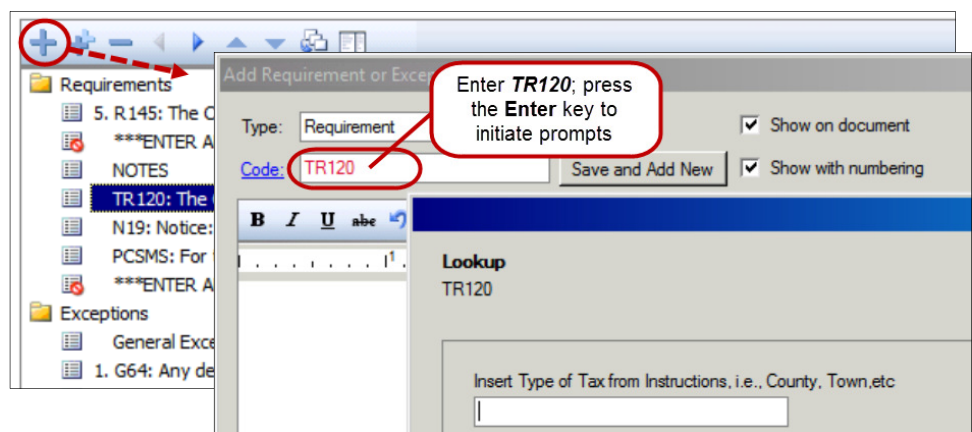
2. In the **Code** field, place your cursor after the asterisk; press the **Backspace** key to remove the asterisk

3. Press the **Tab** key; this automatically opens the prompt screen

4. Answer each prompt; click the **OK** button to continue to the next prompt

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

6. If an additional **TR120 Requirement** is needed,

    a) Click the **Add Requirement or Exception** icon

    b) In the **Code** field enter *TR120*; press the **Enter** key
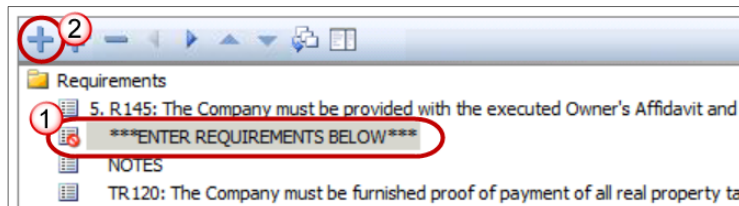
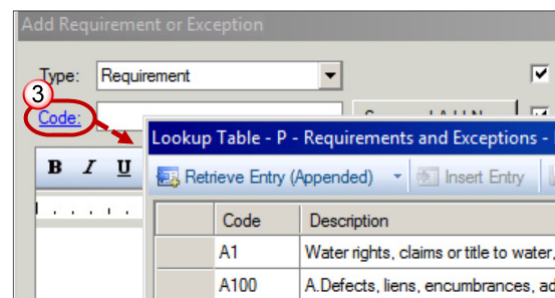   c) Repeat **Steps 4-5** above

7. Repeat **Steps 6a-c**, if needed

❑ Enter Additional Requirements

1. Highlight the ***ENTER ADDITIONAL REQUIREMENTS BELOW*** entry

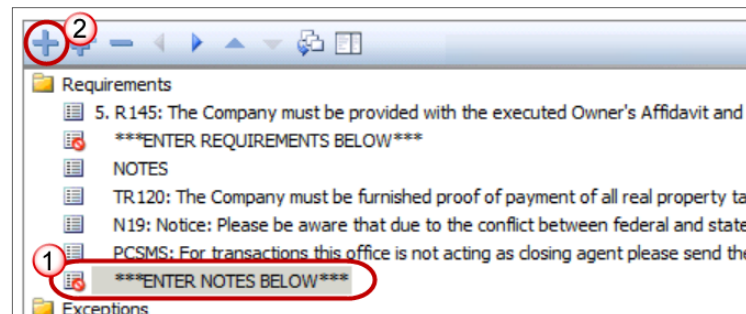2. Click the **Add Requirement or Exception** ⊞ icon

IMPORTANT: Do **not** highlight **NOTES** to add your requirement notes; it will affect the document coding. Follow the steps below to add Notes for Requirements.

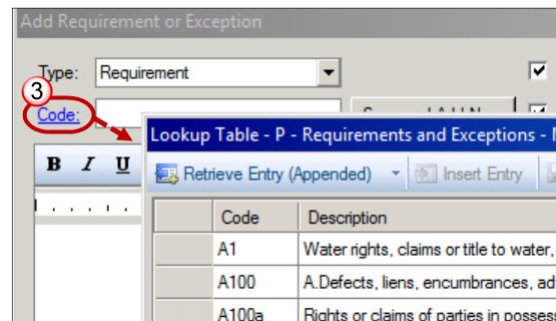3. Use the **Code** link to select the applicable entry; answer prompts as needed

❑ Enter Additional Notes for Requirements

1. Highlight the ***ENTER NOTES BELOW*** entry
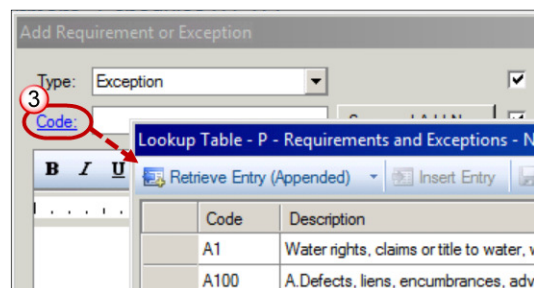
2. Click the **Add Requirement or Exception** ⊞ icon
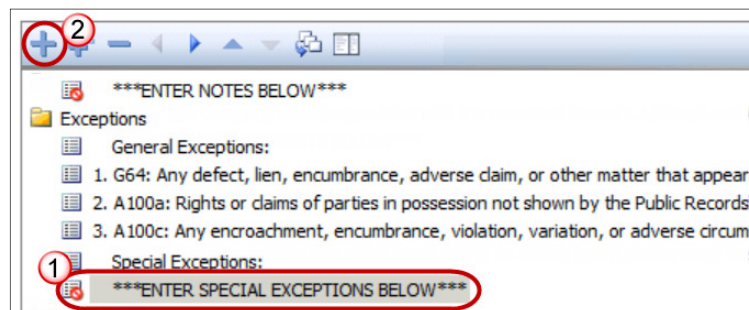

3. Use the **Code** link to select the applicable entry; answer prompts as needed

❑ Enter Special Exceptions

1. Highlight the ***ENTER SPECIAL EXCEPTIONS BELOW*** entry

2. Click the **Add Requirement or Exception** icon

3. Use the **Code** link to select the applicable entry; answer prompts as needed

Additional Info Addendum screen

❑ Click the **zTax Code** link

❑ Double-click the applicable entry
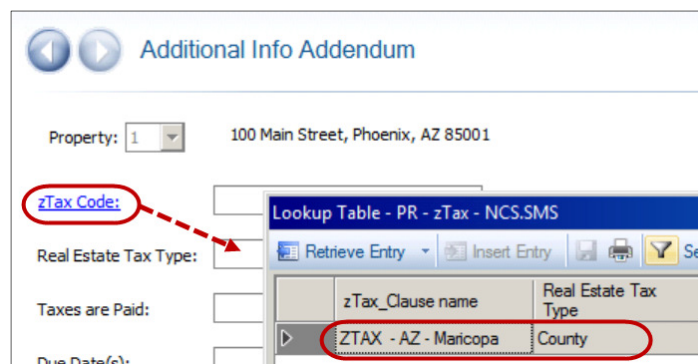
Document tab

❑ Locate the **ALTA COMMITMENT 2016 (SMS)** folder

❑ With the folder highlighted, drag and drop the folder to **Selected ReadyDocs**; you should see all of the documents within the folder in the **Selected ReadyDocs** section

❑ Click **Distribute**
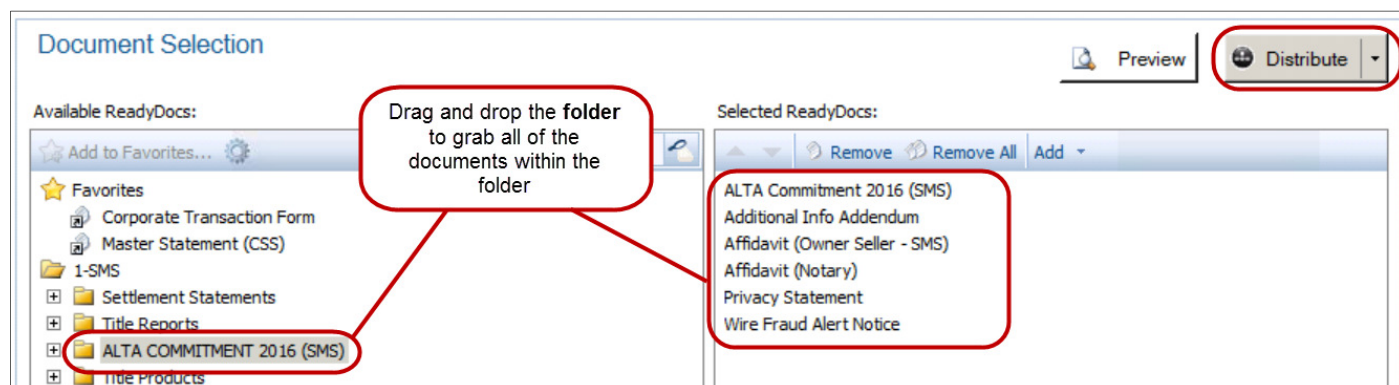
❑ Check the **Merge > All** radio button

❑ Check the **Publish** check box

❑ Click **Distribute** to upload to smartVIEW

1. Click the **OK** button at the **Publish To Order** prompt; this saves a copy to the **Attachments** screen in SoftPro Select

2. When prompted,

   a) In the **Document Name** field enter, *TITLE COMMITMENT [enter order number]*

   b) Click the **Documents** link

      i. When prompted, select the smartVIEW folder; click the **OK** button

   c) Click the **OK** button to complete the upload