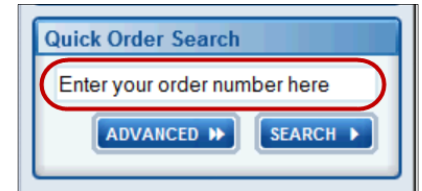


Preparing the Title Commitment

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

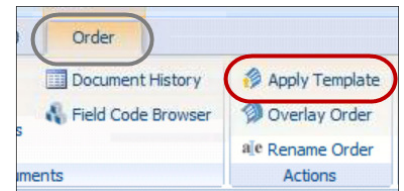
Start Page Tab


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

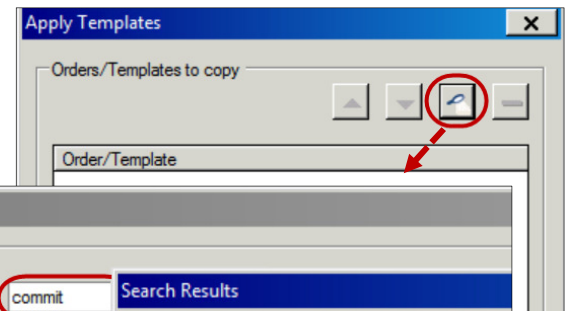


Apply the Template

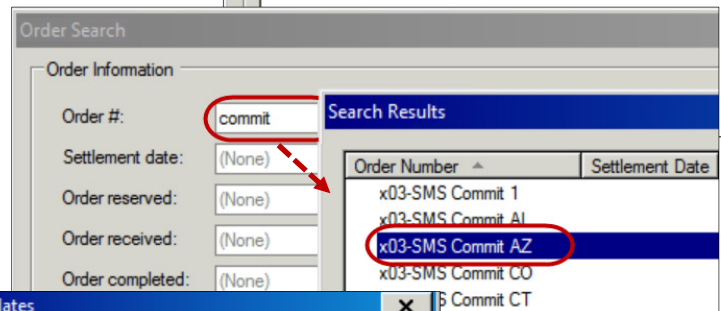
- ❑ Apply the applicable template
 1. From the **Order** ribbon, click the **Apply Template** button



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

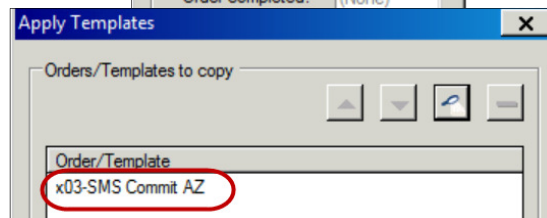


3. In the **Order #** field, enter *commit*; press the **Enter** key
4. Double-click the applicable template



Order Number	Settlement Date
x03-SMS Commit 1	
x03-SMS Commit AI	
x03-SMS Commit AZ	
x03-SMS Commit CO	
x03-SMS Commit CT	

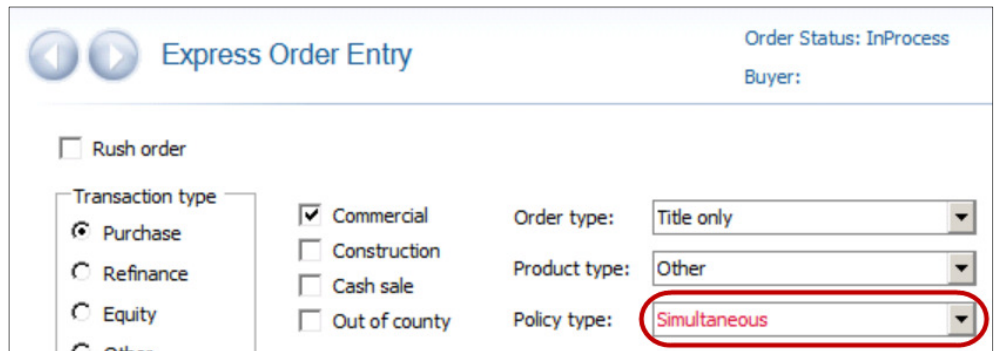
5. Click **OK** to apply
6. Click **OK** to confirm template has been applied



Preparing the Title Commitment

Order Entry screen

☐ Verify the **Policy type**



Order Status: InProcess
Buyer:

☐ Rush order

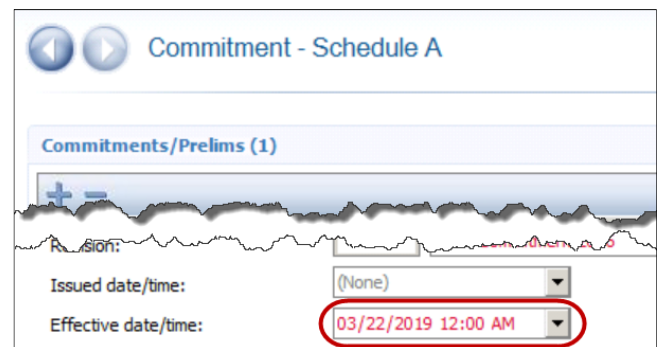
Transaction type:
☒ Purchase
☐ Refinance
☐ Equity
☐ Other

☒ Commercial
☐ Construction
☐ Cash sale
☐ Out of county

Order type: Title only
 Product type: Other
 Policy type: **Simultaneous**

Commitment – Schedule A screen

☐ Enter the **Effective date/time**

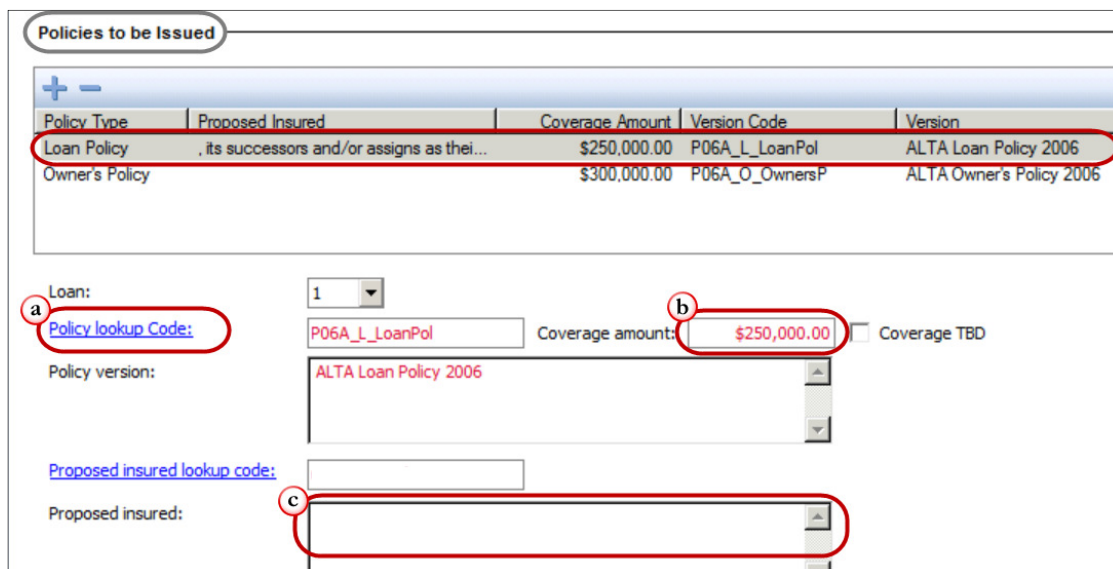


Commitments/Prelims (1)

Issued date/time: (None)
 Effective date/time: **03/22/2019 12:00 AM**

☐ 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



Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy	, its successors and/or assigns as their...	\$250,000.00	P06A_L_LoanPol	ALTA Loan Policy 2006
Owner's Policy		\$300,000.00	P06A_O_OwnersP	ALTA Owner's Policy 2006

Loan: 1

a) **Policy lookup Code:** P06A_L_LoanPol Coverage amount: **\$250,000.00** ☐ Coverage TBD

Policy version: ALTA Loan Policy 2006

Proposed insured lookup code:

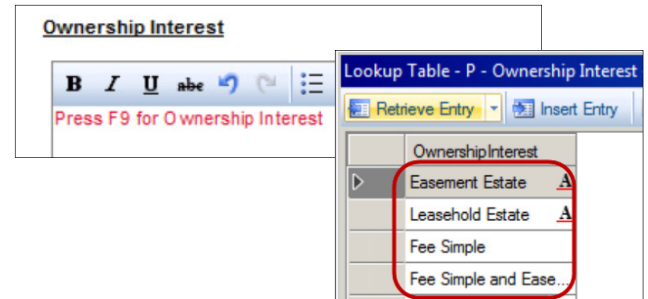
Proposed insured: **c)**

Preparing the Title Commitment

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



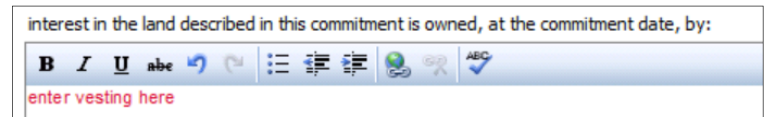
Ownership Interest

Press F9 for Ownership Interest

Lookup Table - P - Ownership Interest

OwnershipInterest
Easement Estate
Leasehold Estate
Fee Simple
Fee Simple and Ease...

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

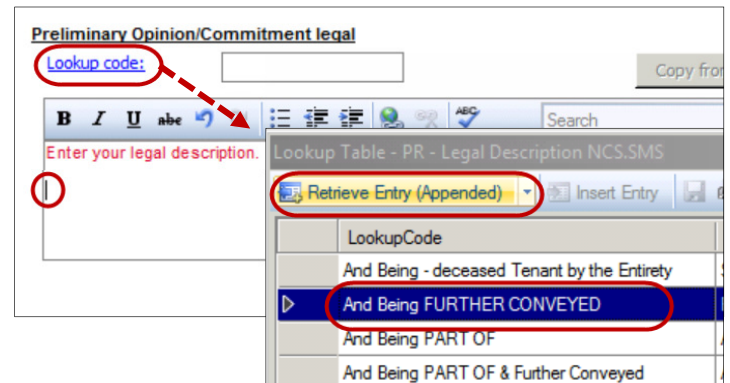


interest in the land described in this commitment is owned, at the commitment date, by:

enter vesting here

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



Preliminary Opinion/Commitment legal

Lookup code: []

Enter your legal description.

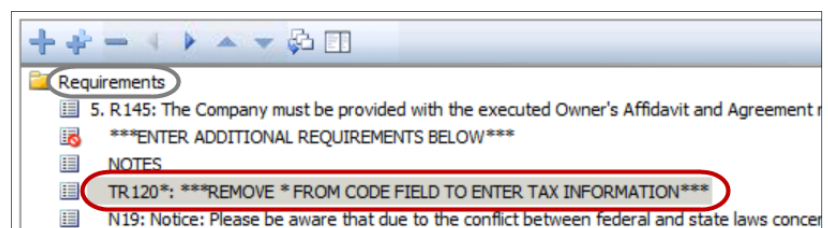
Lookup Table - PR - Legal Description NCS.SMS

LookupCode
And Being - deceased Tenant by the Entirety
And Being FURTHER CONVEYED
And Being PART OF
And Being PART OF & Further Conveyed

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



Requirements

5. R145: The Company must be provided with the executed Owner's Affidavit and Agreement

ENTER ADDITIONAL REQUIREMENTS BELOW

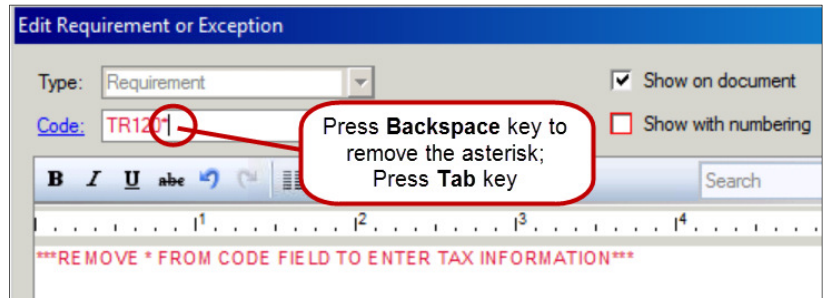
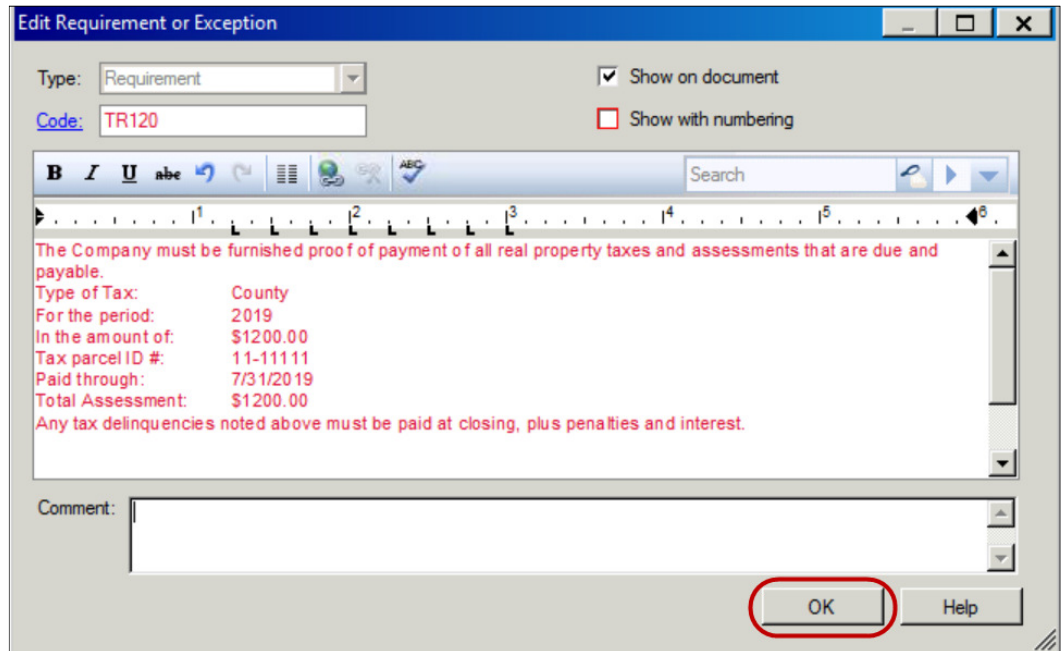
NOTES


TR120*: ***REMOVE * FROM CODE FIELD TO ENTER TAX INFORMATION***

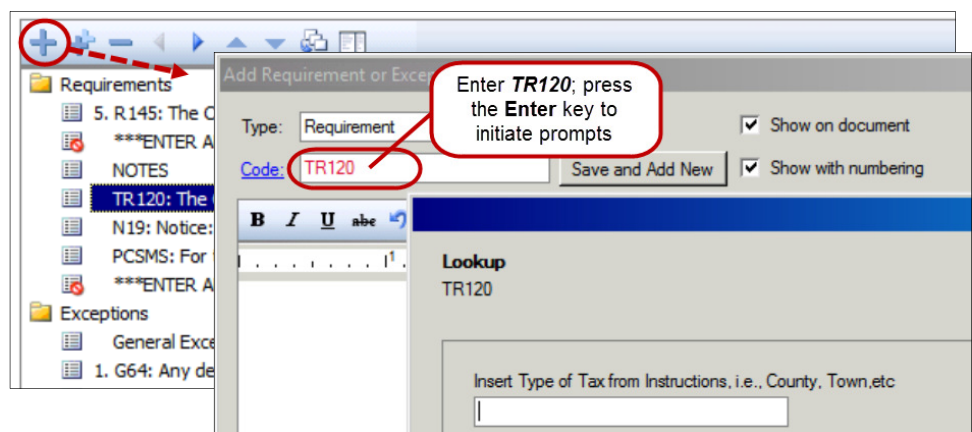
N19: Notice: Please be aware that due to the conflict between federal and state laws concern

Preparing the Title Commitment

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

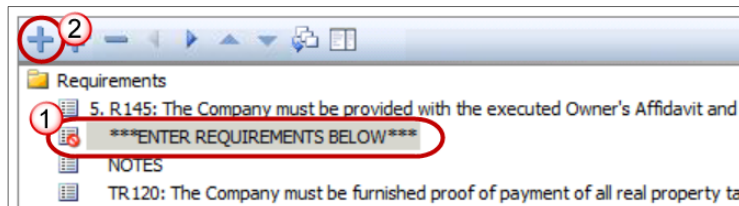


7. Repeat **Steps 6a-c**, if needed

Preparing the Title Commitment

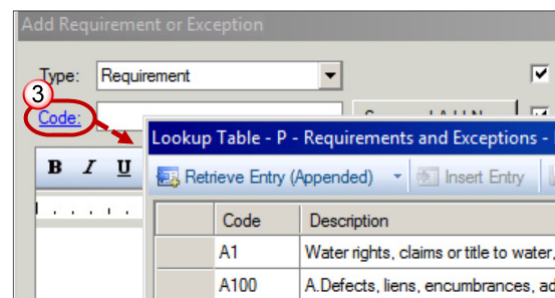
❑ Enter Additional Requirements

1. Highlight the *****ENTER ADDITIONAL REQUIREMENTS BELOW***** entry
2. Click the **Add Requirement or Exception**  icon




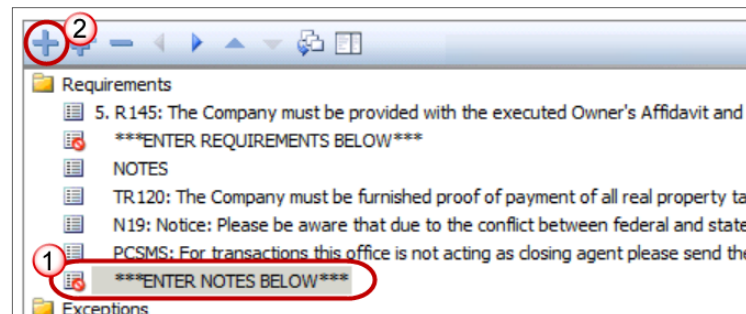
IMPORTANT: Do **not** highlight **NOTES** to add your requirement notes; it will affect the document coding. Follow the steps below to add Notes for Requirements.

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

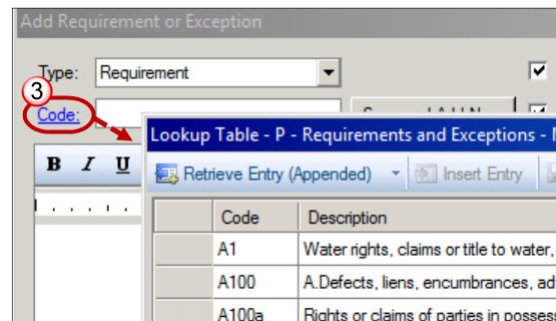


❑ Enter Additional Notes for Requirements

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




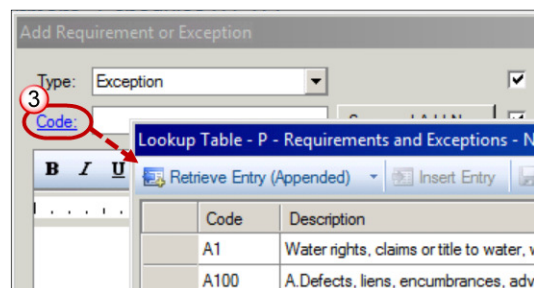
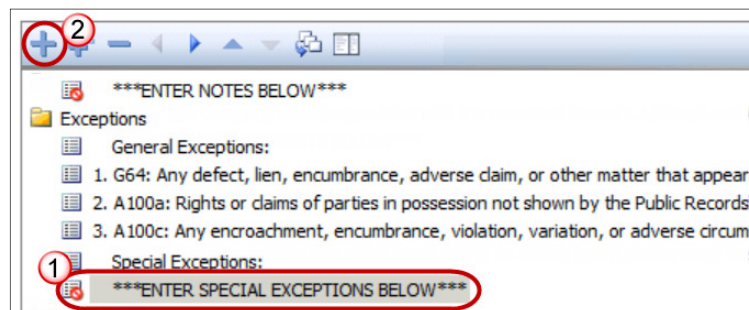
3. Use the **Code** link to select the applicable entry; answer prompts as needed



Preparing the Title Commitment

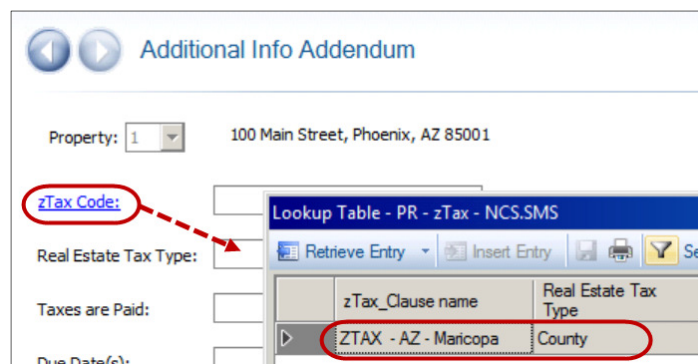
❑ Enter Special Exceptions

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



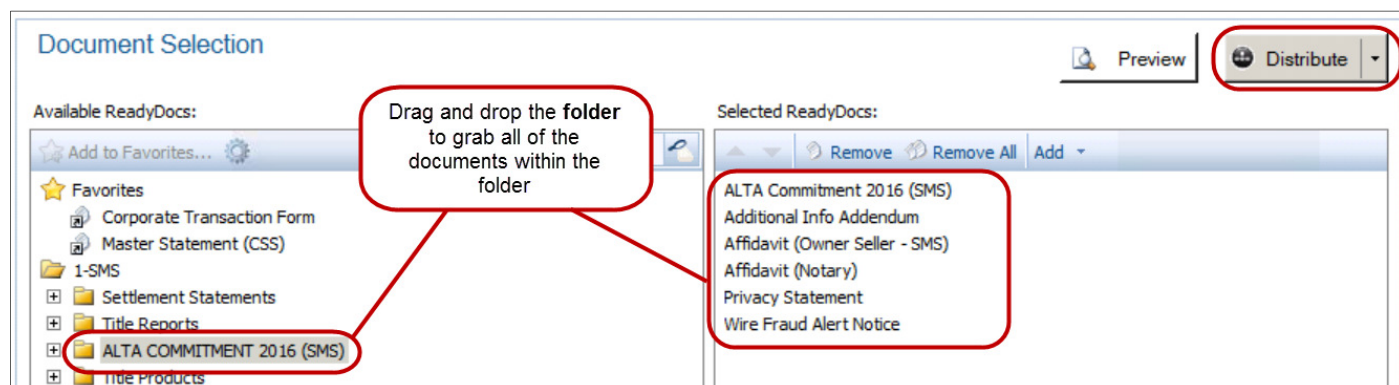
Additional Info Addendum screen

- ❑ 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

Document Distribution

Documents will be distributed in the order shown

Distribute	Status	Document	For	Stamp
<input checked="" type="checkbox"/>		ALTA Commitment 2016 (SMS)	Commitment	
<input checked="" type="checkbox"/>		Additional Info Addendum	Order KCMJA050119	
<input checked="" type="checkbox"/>		Affidavit (Owner Seller - SMS)	Property	
<input checked="" type="checkbox"/>		Affidavit (Notary)	Order KCMJA050119	
<input checked="" type="checkbox"/>		Privacy Statement	Order KCMJA050119	
<input checked="" type="checkbox"/>		Wire Fraud Alert Notice	Order KCMJA050119	

Merge

☐ None

☒ All

Action

☐ Print

☐ Email

☒ Publish

☐ Save to file

Distribute

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

Publish To Order

The following items will be added to the order's attachments. To rename items or change the selected folders, edit the entries in the grid below.

Name	Description	Folder
ALTA Commitment 2016 (S...	Commitment	Attachments

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

smartview Document Post

Document Name:

TITLE COMMITMENT KCMJA050119

Folder:

Documents

Comments:

☐ All documents use same Folder and Comments

OK

smartview Folder Hierarchy

- Documents
 - Title
 - Closing
 - Preliminary Documents
 - Disbursements
 - Final Closing Documents
 - Escrow Only
 - Correspondence
 - Post Closing
 - Instructions
 - Unrecorded Documents
 - Recorded Documents
 - Policy
 - Texas