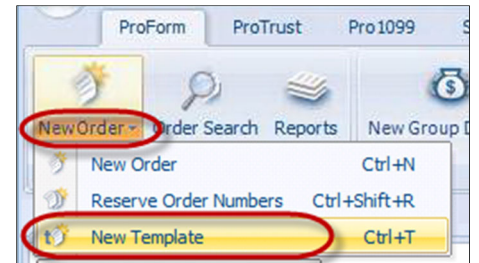


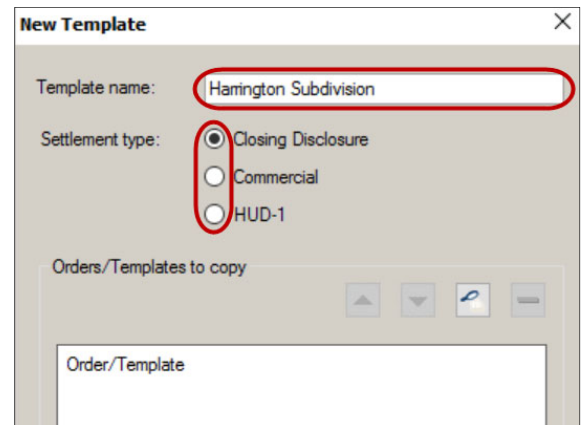
Creating a Subdivision Template for Title Using an Existing Order

Using a template allows you to enter legal description details, exceptions, and/or requirements for a specific subdivision once, then easily apply those details to new orders in that subdivision. Follow these steps to create a new template using an existing order.

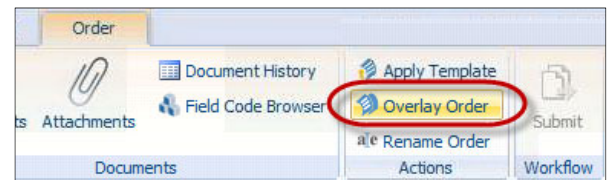
1. From the **New Order** drop-down menu, select **New Template**



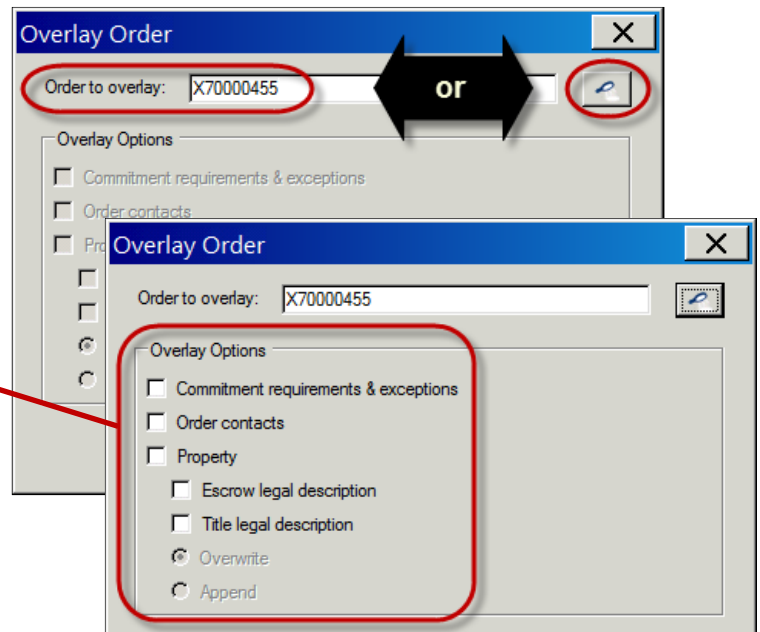
2. In the **Template name** field, enter a name
3. Check the applicable **Settlement type** radio button, click the **OK** button



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



5. Validate "source" order number
 - › If you already know the "source" order number, enter it and press the **Tab** key
 - › If you don't already know the "source" order number, click the **Search** icon, search for & highlight, then click the **OK** button to select the "source" order



The **Overlay Options** enable once SoftPro validates the "source" order number.

- › **Commitment requirements & exceptions** – add specific requirements/exceptions
- › **Order contacts** – add Contacts
- › **Property** – add the Property address, Escrow legal description and/or the Title legal description

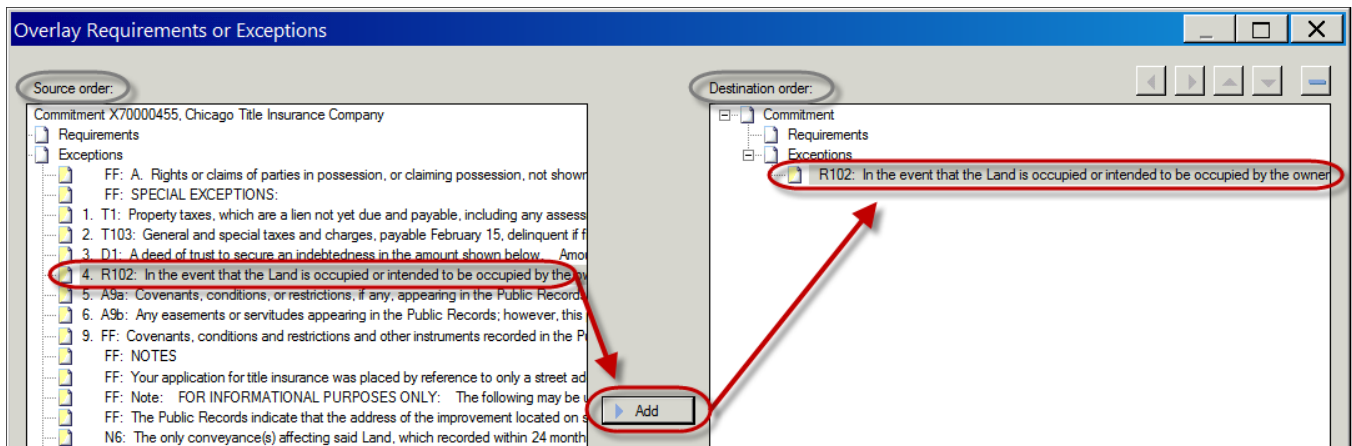
Creating a Subdivision Template for Title Using an Existing Order

Overlaying Exceptions & Requirements (if applicable)

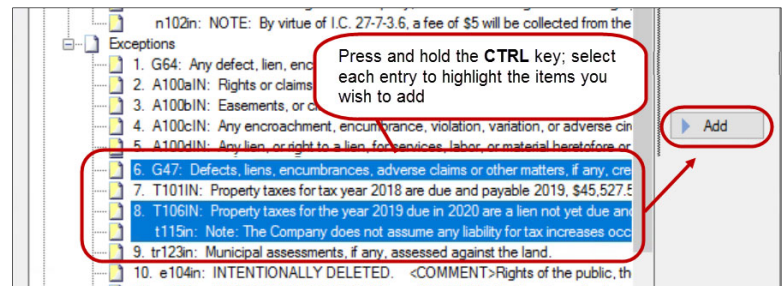
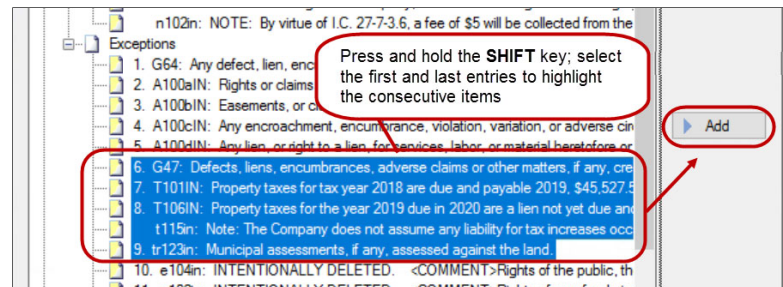
6. Check the **Commitment requirements & exceptions** check box

The **Overlay Requirements or Exceptions** window appears.

7. Select entries to add to your template
 - › If adding individual entries,
 - a. On the left **Source order**, highlight the item; click **Add**
 - b. Repeat if you have additional items to add



- › If adding multiple consecutive entries,
 - a. Press/hold the **SHIFT** key
 - b. On the left **Source order**, highlight the first item you wish to add
 - c. Highlight the last item you wish to add
 - d. Release the **SHIFT** key
 - e. Click the **Add** button
- › If adding multiple non-consecutive entries,
 - a. Press/hold the **CTRL** key
 - b. On the left **Source order**, highlight the first item you wish to add
 - c. Continue selecting the additional items
 - d. Release the **CTRL** key
 - e. Press the **Add** button



8. Click the **OK** button

Creating a Subdivision Template for Title Using an Existing Order

Overlaying Order Contacts (if applicable)

Typically, Title users do not need to add Contacts to a template because the appropriate Contact placeholders pull in with the Operation's transaction template (e.g., Sale, Refi, Cash, etc.). **In the rare instance you need to add a Contact to a template,**

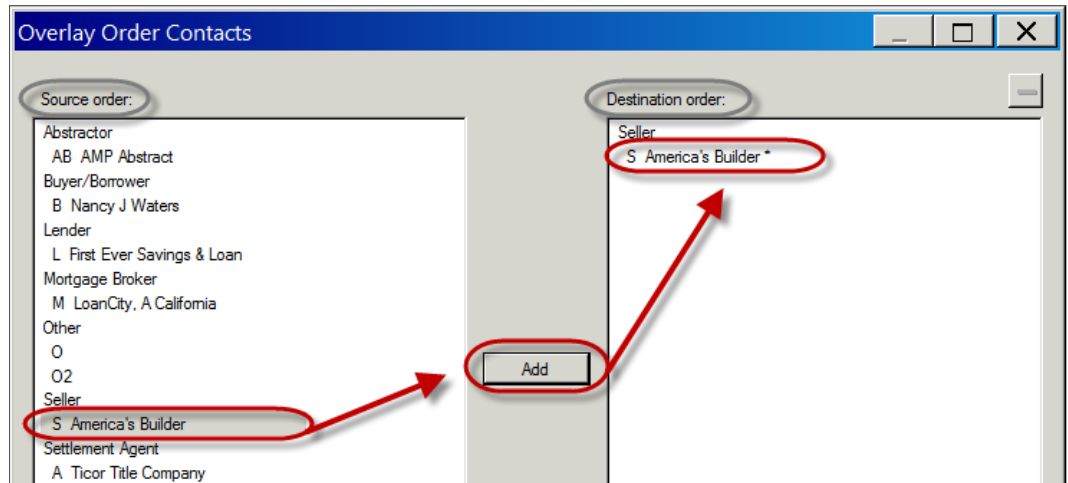
9. Check the **Order contacts** check box

The **Overlay Order Contacts** window appears.

10. On the left **Source Order**, highlight the item you wish to add to this template; click **Add**

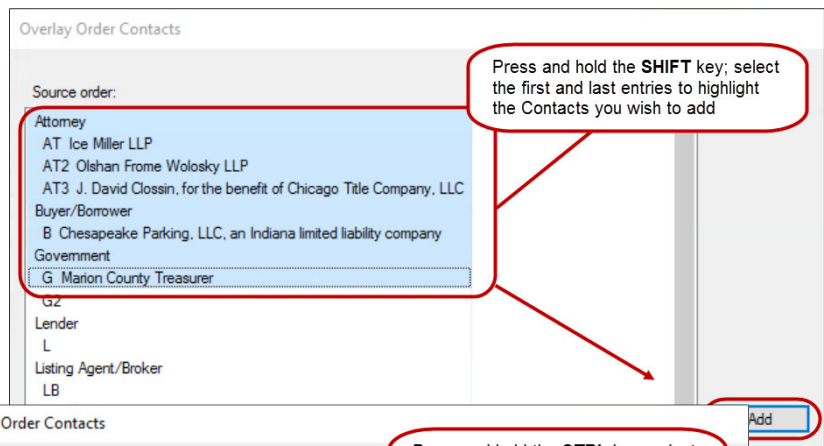
The item is added to the **Destination Order** on the right.

11. Repeat **Step 10** until all Contacts are added
12. Click the **OK** button



As with exceptions & requirements, you can add multiple consecutive and non-consecutive entries at one time by using the,

- › **SHIFT** key if adding multiple consecutive entries



- › **CTRL** key if adding multiple non-consecutive entries



Creating a Subdivision Template for Title Using an Existing Order

Overlaying Property Information (if applicable)

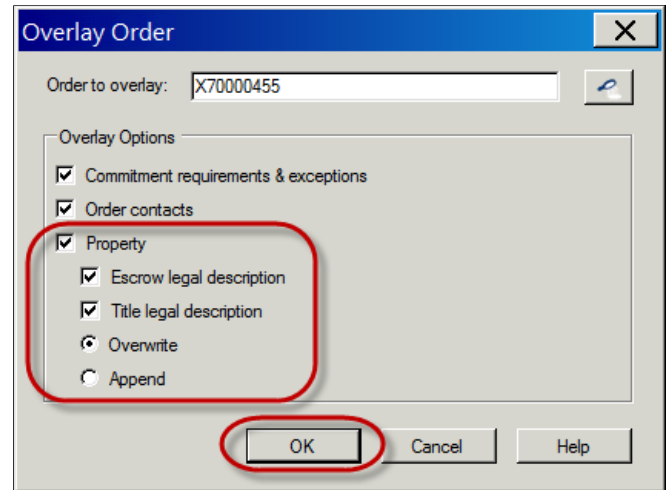
13. Check the **Property** check box

Both the **Escrow legal description** and the **Title legal description** are checked by default.

14. If applicable, uncheck the appropriate check box(es) based on the information needed for this template

The **Overwrite** default setting overwrites existing property information in the template.

15. If applicable, select the **Append** radio button to add property information instead of overwriting; click **OK**
16. Press the **Ctrl + S** keyboard shortcut to save the template



Your new template is available for you to apply to future orders.

