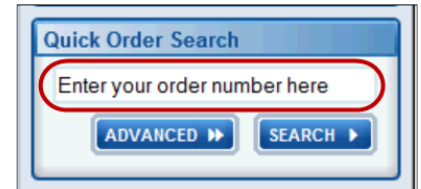


## Preparing the Title Report

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

### Start Page Tab

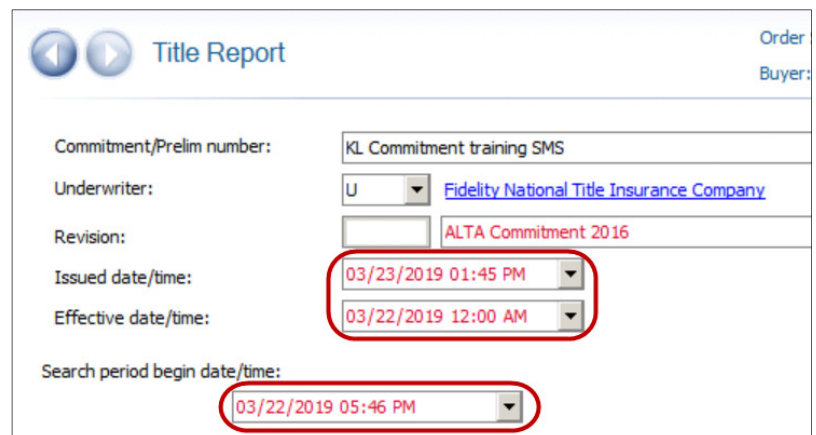
- ☐ In the **Quick Order Search** field, enter the order number; press the **Enter** key



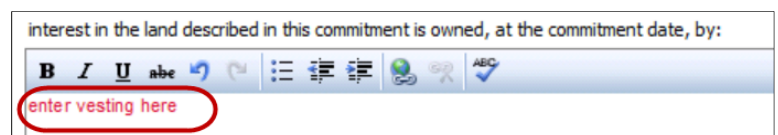
**IMPORTANT:** Do **not** overlay a template when preparing a Title Report.


### Title Report screen

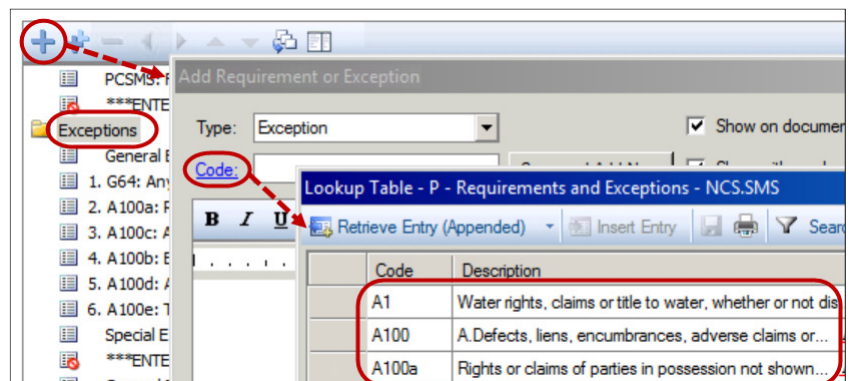
- ☐ Enter the **Issued date/time**
- ☐ Enter the **Effective date/time**
- ☐ Enter the **Search period begin date/time**




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

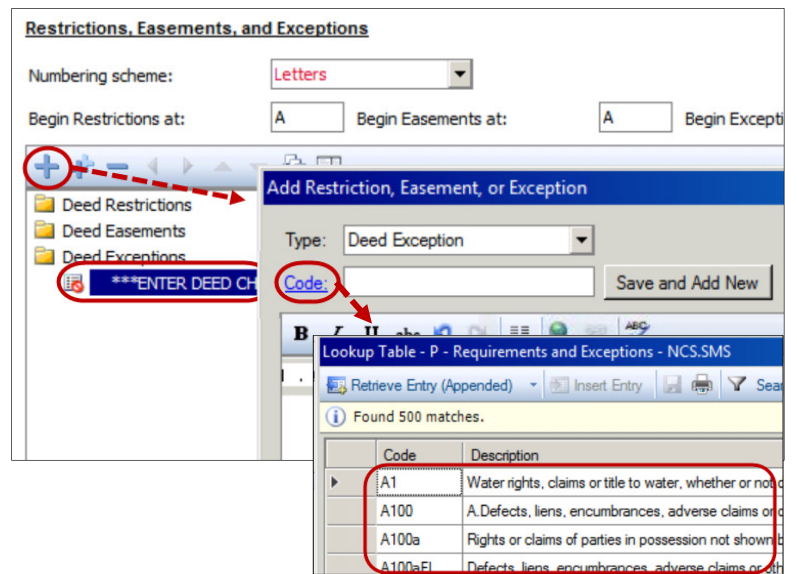


- ☐ Add Exceptions
  - In the **Requirements and Exceptions** grid, highlight the **Exceptions** folder
  - Click the **Add Requirement and Exception**  icon
  - From the **Add Requirement or Exception** window, click the **Code** link
  - Double-click the applicable entry to select
  - Repeat **Steps 1-4** until all exceptions are added



Code	Description
A1	Water rights, claims or title to water, whether or not dis
A100	A.Defects, liens, encumbrances, adverse claims or...
A100a	Rights or claims of parties in possession not shown...

- ❑ For Deed Chains/Addendums,
  1. In the **Restrictions, Easements, and Exceptions** grid, highlight the **\*\*\*ENTER DEED CHAIN ITEMS BELOW\*\*\***
  2. Click the **Add Restriction, Easement or Exception**  icon
  3. Using your code spreadsheet, locate the **TR-Deed Chain** entry; double-click to select
  4. Repeat **Steps 1-3** until all have been added

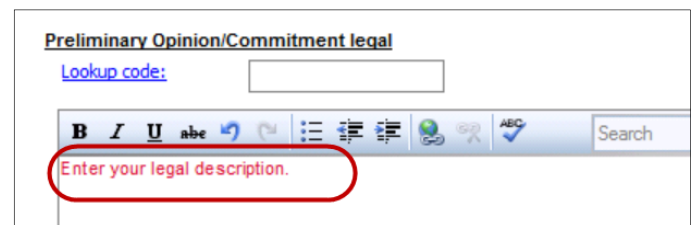


### Title Legal Description screen

- ❑ In the **Preliminary Opinion/Commitment legal** field, enter the

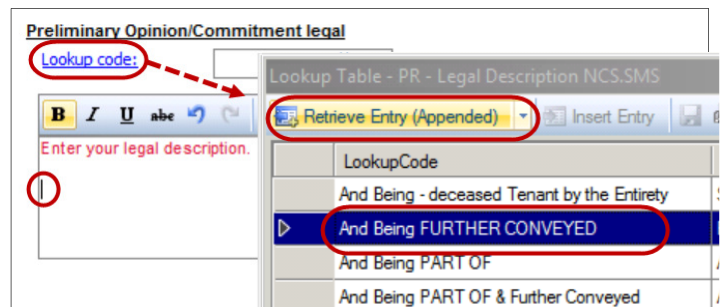
#### 1. Legal description

If copying the legal description from another source, be 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.



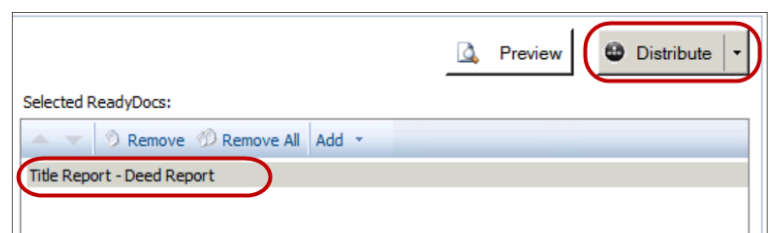
#### 2. Being clause

- 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



### Document tab

- ❑ Locate and double-click the applicable **Title Report** document
- ❑ Click **Distribute**



- ☐ Check the **Publish** check box
- ☐ Click **Distribute** to upload to smartVIEW

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
Title Report - Deed Report	Property 1	Attachments

2. When prompted,
  - a) Enter the **Document Name**
  - b) Click the **Documents** link
    - i. When prompted, select the smartVIEW folder; click **OK**
  - c) Click the **OK** button to upload

**smartview Document Post**

Document Name:

Title Report - Deed Report

Folder:

Documents

Comments:

☐ All documents use same Folder and Comments

OK Cancel

**smartview Folder Hierarchy**

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

**OK**