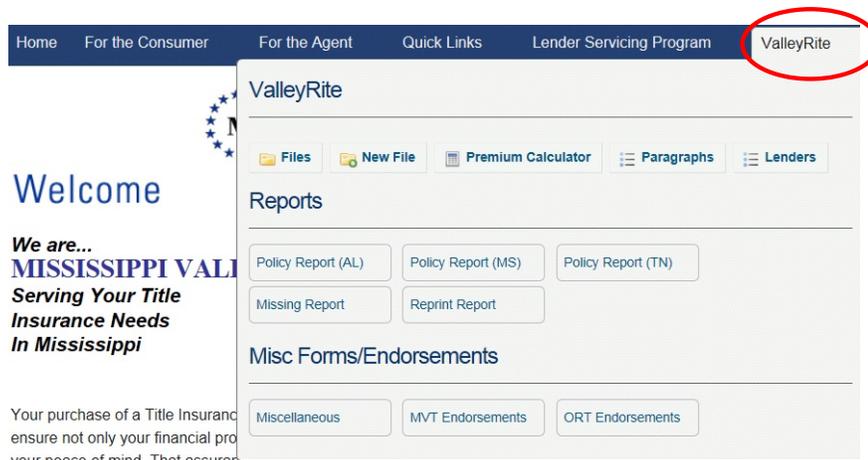# VALLEYRITE

ValleyRite has been designed to assist in the issuance of title insurance in many ways. One of these ways is providing a **Retrieval Program** for a Commitment, Policies and Endorsements. The user can print the Jacket and produce the schedules from other title insurance software.

This material will instruct the user on the **Retrieval** of a Commitment, Policies and Endorsements **ONLY**.

LOCATION

ValleyRite is located on the Menu Main Bar as an Option.

LOGIN / LOG ON

When you access ValleyRite, if the user has not already logged on, the following will display:

Your User Name is your e-mail address and your password is what you have setup. If you have forgotten your password, you can access Forgot Password and it will e-mail you a temporary Password that allows you to reset your password.

PROCEDURE

SETTINGS

Settings allows the user to change a password, add users to the office, list office users and display your profile. It is located on the Main Menu Bar and appears after you log on to our website. Refer to New Login & Password Procedure material, if you have any questions.

COMMITMENT

To **Retrieve** a Commitment, click New File from the ValleyRite drop down menu and the following will display:

Transaction 1: This represents the current closing in which title insurance is requested.

Start Another Transaction: This represents another closing that might occur after Transaction 1 has been completed.

NOTE: The user can have several transactions under this file name.

File Name Field: This is your office file name or number. This is a required field.

Add Notes Section: This allows the user to enter any notes that are needed for this transaction. These notes will not print on any of the documents. After entering your notes, click the Save Notes Button.

Files Button: This allows the user to return to their list of files.

After entering the File Name, click Add Commitment and the following will display:

JACKET INFO TAB allows the user to **RETRIEVE** a commitment. The commitment number will be assigned to your agency when the user clicks Add Commitment and will appear in the Commitment Number Field.

> **Always remember that as soon as you click Add Commitment Button your agency will be issued a commitment number.**
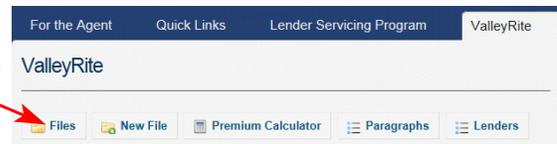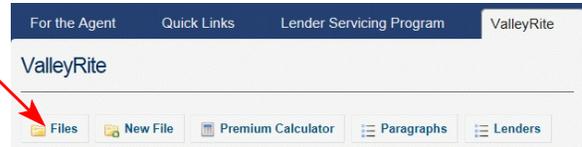
> *Print Jacket Button:* This allows the user to print the Commitment Jacket only. It will be in a PDF format. If you are not going to use ValleyRite to complete your schedules, then you would click Files.

> *Void Button:* If the closing fell through, then the user will need to Void this commitment.

> *Complete Schedules***:** This allows the user to continue with the program and produce the schedules for this commitment.

LENDER'S POLICIES

To **Retrieve** a Lender's Policy Jacket, click Files from the ValleyRite drop down and the following will display:

The program will automatically list the last files the user has been working on **OR** the user can enter data in the search field and click the *Search Button*.

Click the file and the following will display:

Click Add Lender's Policy and the following will display:

JACKET INFO TAB allows the user to **RETRIEVE** the lender's policy. If you did not prepare your Commitment Schedules for this file in ValleyRite, you will have to enter all the fields on this tab. <u>Then a policy number will be assigned to your agency for this file</u>.

>   ***Property Type:*** Choose from the drop down whether the property is Residential or Non-Residential.

>   ***Policy Type:*** Choose from the drop down the type of lender's policy that will be issued. When this option has been chosen, the web page **will refresh (jump)** to display your policy number.

>   ***Policy Amount:*** Enter the amount of the loan which is shown on your Deed of Trust (MS) or Mortgage (AL).

>   ***Reissue Amount:*** This is a discount off the original premium charged on title insurance. Refer to your agent's manual for the correct procedure and formula for this field.

>   ***Print Jacket Button:*** This allows the user to print the Policy Jacket only. It will be in a PDF format. If you are not going to use ValleyRite to complete your schedules, then you would click Files **OR** click your file name located next to the file option to retrieve an Owner's Policy for the same file.

Void Button: This allows the user to void a policy.

*Complete Schedules***:** This allows the user to continue with the program and produce the schedules for this policy.

OWNER'S POLICIES

To **Retrieve** an Owner's Policy Jacket, click Files from the ValleyRite drop down and the following will display:

The program will automatically list the last files the user has been working on **OR** the user can enter data in the search field and click the *Search Button*.

Click the file and the following will display:

Click Add Owner's Policy and the following will display:

JACKET INFO TAB allows the user to **RETRIEVE** your owner's policy. If you did not prepare your Commitment Schedules for this file in ValleyRite, you will have to enter all the fields on this tab. Then a policy number will be assigned to your agency for this file.

Property Type: Choose from the drop down whether the property is either Residential or Non-Residential.

Policy Type: Choose from the drop down the type of owner's policy that will be issued. When this option has been chosen, the web page **will refresh (jump)** to display your policy number.

Policy Amount: Enter the full value of the property and any improvement as determined by the purchase price or some other valuation.

Reissue Amount: This is a discount off the standard premium charged on title insurance. Refer to your agent's manual for the correct procedure and formula for this field.

Print Jacket Button: This allows the user to print the Policy Jacket only. It will be in a PDF format. If you are not going to use ValleyRite to complete your schedules, then you would click Files.

Void Button: This allows the user to void a policy.

Complete Schedules: This allows the user to continue with the program and produce the schedules for this policy.

ENDORSEMENTS

LOCATION
This link is located on the Right Side Menu and under For The Agent on our website.

LOGIN / LOG ON

When you access 2006 ALTA Endorsements, if the user has not already logged on, the following will display:

Your User Name is your e-mail address and your password is what you have setup. If you have forgotten your password, you can access Forgot Password and it will e-mail you a temporary Password that allows you to reset your password.

PROCEDURE

Click the appropriate endorsement. They are a fill-in-the-blank form which allows you to enter the information while the form is displayed on the computer.