

Text Description



This time around we cover the functionality of the **Text Description** screen. This screen is vitally important if you plan on generating a commitment and or title policies for the file you are working in.

The first option on this screen is **Select Text Description**. This will select the section of the associated documents that you wish to edit. This list will initially appear in red text, indicating that no changes have been made and defaults will pull to the documents. Of all the items on this list your property description, requirements, and exceptions are the most important for you to pay attention to. Since there is nowhere else in the file to enter this information, the documents will only pull from these entries. The other options on this list generally have somewhere else to pull default information from and only need to be filled out if you wish to overwrite those defaults with custom information.

Groups are selected in order to filter the view of available boilerplates. **Boilerplates** allow you to quickly enter text and, in some cases, pull information from other screens to this screen. One thing to bear in mind when using **Boilerplates** that pull information is that the information must be entered on the other screen prior to selecting the **Boilerplate**. For example, if you select a **Boilerplate** that pulls information from the recording screen and the corresponding entry has not been made on that screen, the **Boilerplate** will be incomplete. You'll have blank spots in the text you see where the information should be displaying. **Boilerplates** are not retroactive either, so if the screen is filled out after the **Boilerplate** is assigned, those blank spots will still be there.

File Data is essentially a list of activated tags to make it easier to work in this screen. Selecting a tag from this list will populate it in the selected **Text Area**.

Something you may see if you are using Boilerplates are vertical lines (the | symbol). These are indicators of where information needs to be entered that does not pull from within the file. To fill these, you can either manually delete them from the **Text Area**, or you can use the **Fillin Area**. Simply click on the section you wish to modify and enter the information in the **Fillin Area**. This places that text in the next available slot, automatically removing the | as part of the process. Once you have entered the desired text simply hit the Tab button on your keyboard and the system will advance to the next | in the section.

The **Text Area** is where you will be filling in any text you wish to add to the chosen section. Bear in mind that an entry in this field will overwrite any defaults that section normally pulls.

Updating this screen is slightly different from how other pages are handled. The **Update All Descriptions** button will update the page with any changes you have made. This does not have to be done each time you make a change to a section. You can make changes to multiple **Text Areas** and clicking this button will update all of them. The **Delete Description** button will remove the text currently entered in the selected **Text Area**. However, this does not go into effect until the **Update All Descriptions** button has been clicked.

One thing to note when using this screen is that items entered by copying and pasting from an external source have a tendency to bring latent code with them that can cause issues with document generation. The best way to counteract this is by typing in any text you wish to pull to your documents. In situations where this isn't feasible, we recommend copying the text from its source and pasting it into Notepad. Since this converts the rich text into plain text it deactivates the latent code. If you then copy this text and paste it into the **Text Area**, you should be able to avoid most issues.

Some special characters can also cause issues when generating documents. Items such as the degree symbol are best entered by using their ASCII codes. These are generally entered by holding down the Alt key and using the number pad on your keyboard to enter a combination of numbers (the degree symbol, for example, is Alt 248, the section symbol is Alt 21, etc.).

FAQ

"I tried to update my entry but I got an error message saying that I have mismatched braces. What does that mean?"

Mismatched braces means that you are either missing or having non-matching parentheses, brackets, etc. ((), {}, [], <>). If both ends don't match, or one is missing, you will not be able to update.

"The system is automatically numbering items for me every time I create a hard return, but I need some of that information unnumbered."

By default, the system will automatically number the line when you hit the Enter/Return key on your keyboard. If you wish to offset this, start any lines you wish us to number with a double vertical line (||) and the system will only number those lines.

"I want to create a new boilerplate, or edit an existing one. Is this possible?"

Yes. You can do so from your Whiteboard > Back Office > Document Menu > Manage Boilerplates.