



Guide for Customer Administrators

This guide is for client administrators and will cover managing your billing setup, checking usage, and user administration.

Table of Contents

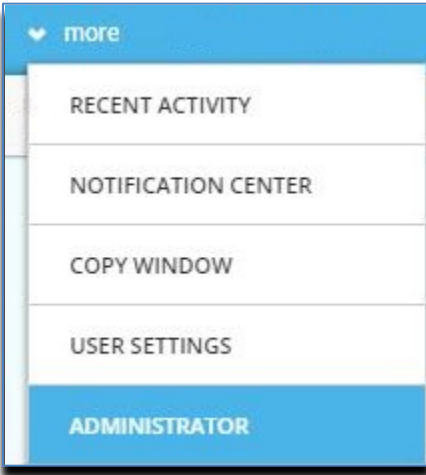
- Client Administration Overview 3
 - Bills/Payments 4
 - Billing Overview 4
 - Credit Card Manager 6
 - Billing Email 6
- User Management 7
 - Creating Groups 7
 - Group Information 8
 - Create User 8
- Usage..... 13
 - Your Users 13
 - User Information..... 13
 - Company Information 14
 - View Activity 14
- For More Information: 15

Client Administrator Overview

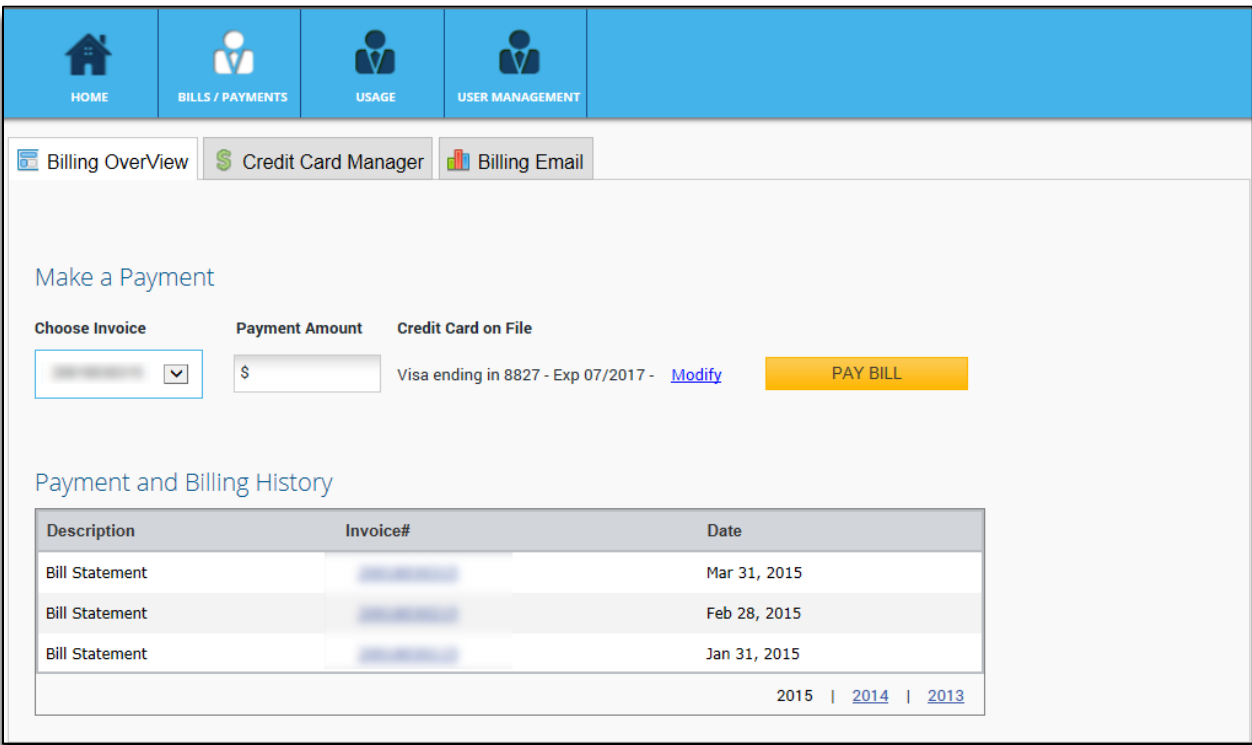
The Client Administrator will be able to manage their account in three areas:

- Billing
- User Management
- Usage

After logging into DataTree, the Administrator can access the client administration page from “More” menu at the top right. From there, they can drop select “Administrator.”



The customer administration home page will load, as shown here.



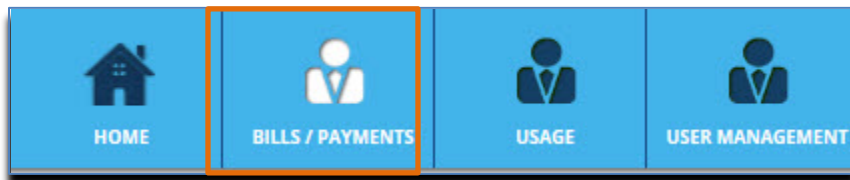
The screenshot shows the customer administration home page. At the top, there is a blue navigation bar with icons for HOME, BILLS / PAYMENTS, USAGE, and USER MANAGEMENT. Below this is a secondary navigation bar with tabs for Billing OverView, Credit Card Manager, and Billing Email. The main content area features a "Make a Payment" section with a "Choose Invoice" dropdown, a "Payment Amount" input field, and a "Credit Card on File" section showing "Visa ending in 8827 - Exp 07/2017" with a "Modify" link and a yellow "PAY BILL" button. Below this is a "Payment and Billing History" section with a table:

Description	Invoice#	Date
Bill Statement	[blurred]	Mar 31, 2015
Bill Statement	[blurred]	Feb 28, 2015
Bill Statement	[blurred]	Jan 31, 2015

At the bottom right of the table, there are navigation links for the years: 2015 | [2014](#) | [2013](#).

Bills/Payments

Click on the Bills/Payments button to access the payment options.

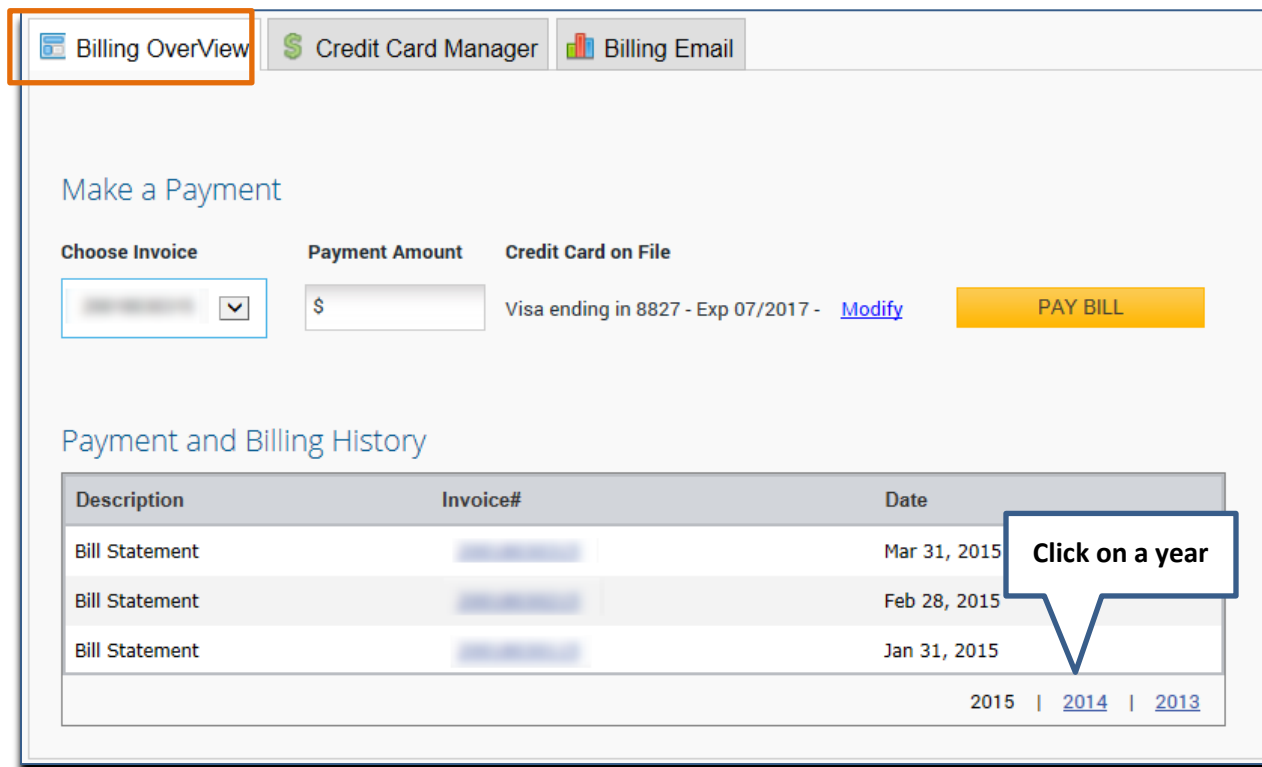


Billing Overview

If you have provided a credit card, you can use this to pay your invoice each month by entering the amount and clicking Pay Bill.

Payment and Billing History can be accessed by year. Click on a year to view the invoices for that year.

Click on an invoice number to view that invoice.



Description	Invoice#	Date
Bill Statement	[REDACTED]	Mar 31, 2015
Bill Statement	[REDACTED]	Feb 28, 2015
Bill Statement	[REDACTED]	Jan 31, 2015

2015 | [2014](#) | [2013](#)

If you need to enter a new credit card, click the Modify link and enter the new information.

The credit card manager tab will open allowing you to update your card.




Billing OverView **Credit Card Manager** Billing Email


Credit Card On File

Name On Card	Card Number	Expires on	Action
JOHN BERNBROCK	xxxx-xxxx-xxxx-8827	07/2017	Cancel

Card Type: AMERICAN EXPRESS

Name on the card:

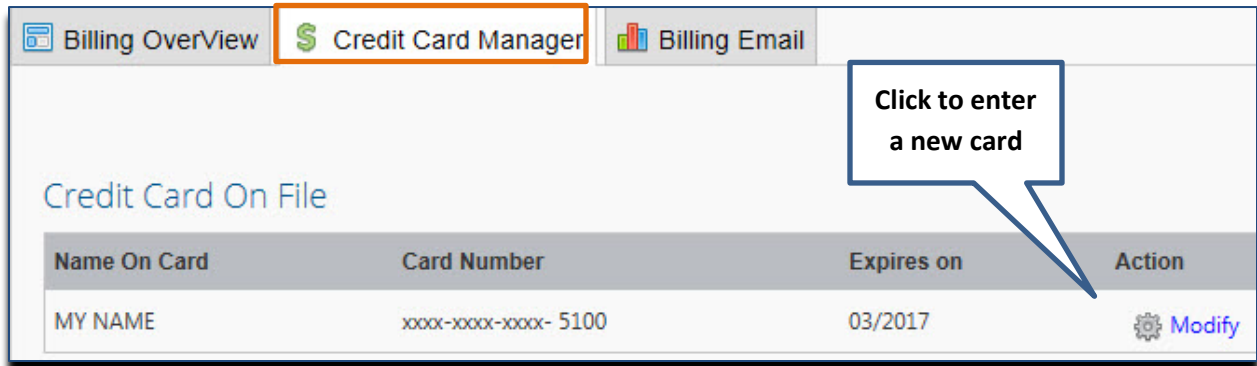
Credit Card   

Credit card number: CSV code: 


Expiration date: MONTH YEAR Billing Zip code:

Credit Card Manager

Credit Card Manager will allow you to change/modify the credit card on file.



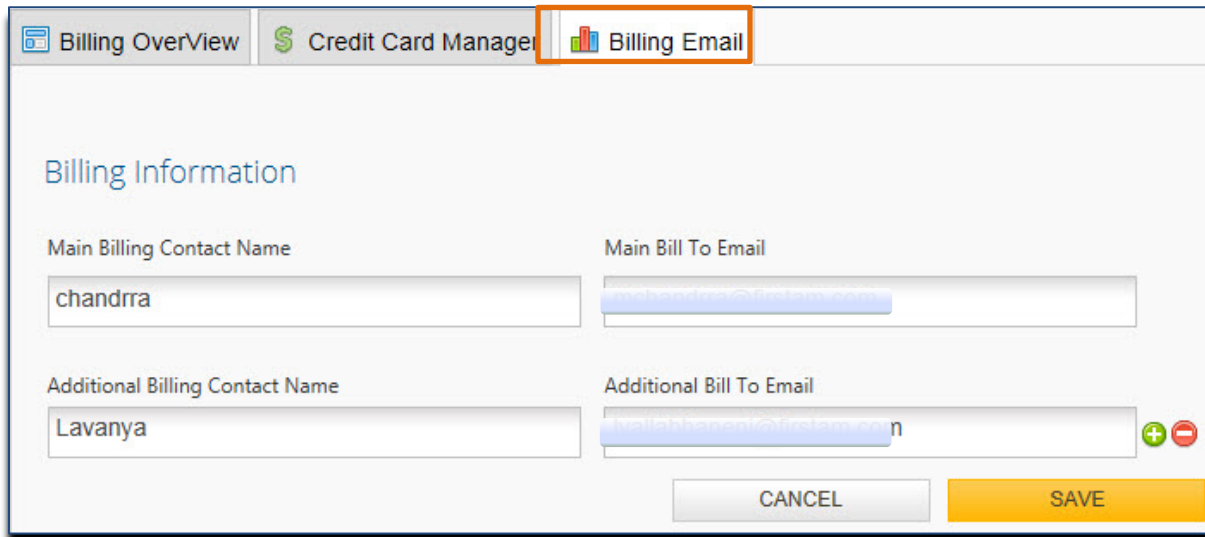
The screenshot shows the 'Credit Card Manager' tab selected in a navigation bar. Below the navigation bar, the title 'Credit Card On File' is displayed. A table lists the credit card information:

Name On Card	Card Number	Expires on	Action
MY NAME	xxxx-xxxx-xxxx- 5100	03/2017	 Modify



A callout box with a blue border and a pointer to the 'Modify' button contains the text: "Click to enter a new card".

Billing Email

The billing information setups up who receives the bill. The additional billing contact allows for another recipient to be included.



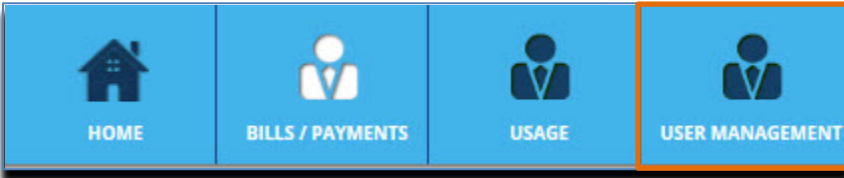
The screenshot shows the 'Billing Email' tab selected in a navigation bar. Below the navigation bar, the title 'Billing Information' is displayed. The form contains the following fields:

- Main Billing Contact Name:
- Main Bill To Email:
- Additional Billing Contact Name:
- Additional Bill To Email:  

At the bottom of the form, there are two buttons: 'CANCEL' and 'SAVE'.

User Management

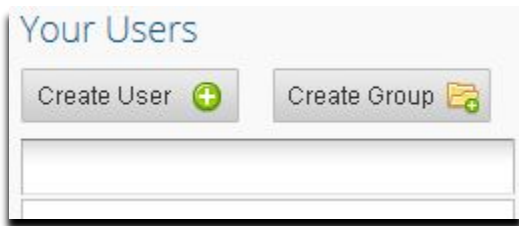
This section allows the Administrator to create and manage Users for your company and setup Groups to provide some organization by department, team, regional office, or other logical grouping.



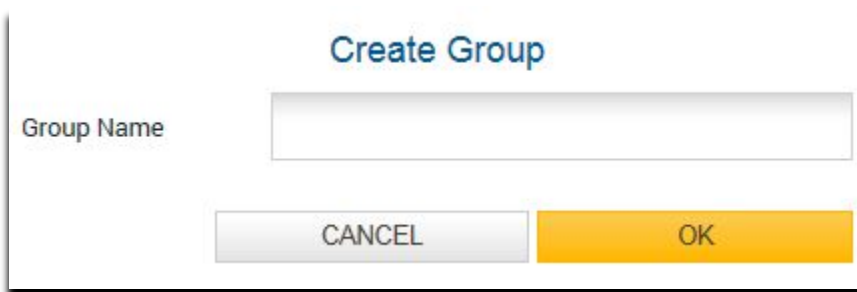
Creating Groups

Before creating users, you may wish to take a few minutes to determine how the groups, if any, should be created. Groups could take the form of billing offices, geographic regions, or departments.

Click on Create Group to begin.



This will open the Create Group dialog box. Enter the group name and click OK.



Once the group has been selected, they can be set as administrators, require reference #'s on searches and/or be deleted in the "Group Information" section.

Group Information

Upon the creation of a new Group, there will be additional access options with regards to authorized products and services. A group can add administrator level privileges, require the reference number when ordering documents or reports, or provide specific services to all members within the group.

For DataTree, make sure that the authorized services of CRM and One-Time Editing are activated (showing a green checkmark). If they show a red x, click on the x and it will switch to a green checkmark indicating the service is now active.

Group Information

Group Name

Xavier

Administrator Require Reference #

DELETE GROUP

CANCEL SAVE

Authorized Products

Authorized Services

CRM One-time Editing

Create User

The client administration can also create and manage user accounts from the Create User section. Clicking Create User will start the new user creation process on the following pages.

Your Users

Create User Create Group

Complete the User Information including the username, name of the user, their email and group membership and whether or not this user will be an administrator. Finally, you can require a reference number for all orders by checking the box next to Require Reference #.

User Information

User Name

Name Email

ADD TO GROUPS Administrator Require Reference #

RESET PASSWORD SUSPEND USER DELETE USER

The Authorized Products are, by default, are all activated (green checkmark):

Authorized Services:

- FlexSearch: Allows the users to search through the DataTree image repository
- One-Time Editing: This option allows users to edit a Property Detail report for printing purposes. The edit is a non-permanent change.
-



In the DataTree platform, FlexSearch and One-Time Editing features can be found here:

Location of FlexSearch:



Within the Property Detail report, One-Time Editing:



Recorded Documents:

The Recorded Documents section allows you to order specific documents types, maps and reports. Note that you can click Enable All or Disable All, as required.

The screenshot shows a window titled "Recorded Documents" with a minus sign icon on the left. Below the title bar, there are two buttons: "Enable All" and "Disable All". The main content area contains a list of document types, each with a green checkmark icon, a text label, and a toggle switch followed by the number "0".

Document Type	Count
Assessor Index Map	0
Last Finance Document	0
Transaction History Basic	0
Transaction History Full	0
Specific Document	0
Last Transfer Document	0
Assessor Map	0
Title Chain and Lien Report	0
Foreclosure	0

Property Reports

This section enables the printable reports, such as the five and seven line reports, as well as Property Detail, Sales Comparables, Tax Status report, etc. By default, these will all be enabled.

Property Reports	
Enable All	Disable All
<input checked="" type="checkbox"/> Multi-Property (Farm) Report 0	<input checked="" type="checkbox"/> Abstractor Services 0
<input checked="" type="checkbox"/> Neighbors Report 0	<input checked="" type="checkbox"/> Multi-Property Statistics Report 0
<input checked="" type="checkbox"/> Single Line Report 0	<input checked="" type="checkbox"/> Five Line Report 0
<input checked="" type="checkbox"/> Seven Line Report 0	<input checked="" type="checkbox"/> Package 0
<input checked="" type="checkbox"/> Walking Five Line 0	<input checked="" type="checkbox"/> Sales Comparables 0
<input checked="" type="checkbox"/> Tax Status Report 0	<input checked="" type="checkbox"/> Legal and Vesting 0
<input checked="" type="checkbox"/> Property Detail Report 0	

Property Lists:

Enabling these features provides the ability to export information from your farm.

Property Lists	
Enable All	Disable All
<input checked="" type="checkbox"/> Order Label 0	<input checked="" type="checkbox"/> Foreclosure Detail Export 0
<input checked="" type="checkbox"/> Indicator Flag Export 0	<input checked="" type="checkbox"/> Farm 0
<input checked="" type="checkbox"/> Mailing Label Export 0	<input checked="" type="checkbox"/> Property Detail Export 0

AVM Reports:

Enabling these options allows users to order a variety of AVMs that can be used for property valuations.

AVM Reports	
Enable All	Disable All
<input checked="" type="checkbox"/> ClearValue AVM Cascade	<input checked="" type="checkbox"/> ValuePoint4
<input checked="" type="checkbox"/> PASS	<input checked="" type="checkbox"/> ValueSure
<input checked="" type="checkbox"/> Home Value Explorer(HVE)	<input checked="" type="checkbox"/> VeroValue
<input checked="" type="checkbox"/> i-Val	<input checked="" type="checkbox"/> SiteXValue
<input checked="" type="checkbox"/> Home Price Analyzer	<input type="checkbox"/> AVM Cascade
<input checked="" type="checkbox"/> CA Value	<input checked="" type="checkbox"/> PowerBase6

Click Save at the bottom of the bottom of the form to save and activate the user. The employee will receive two emails: One containing their username and the second containing a temporary password. The user will be required to change their password at first login.

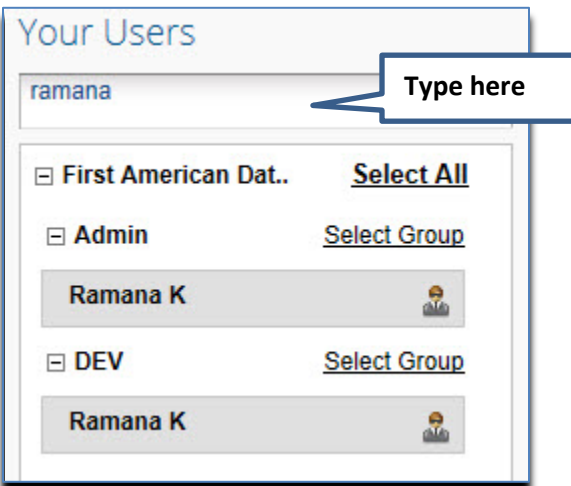
Usage

Usage allows the Administrator to create and manage users within their account, make changes to report formatting and review activity. Click the Usage button to begin.



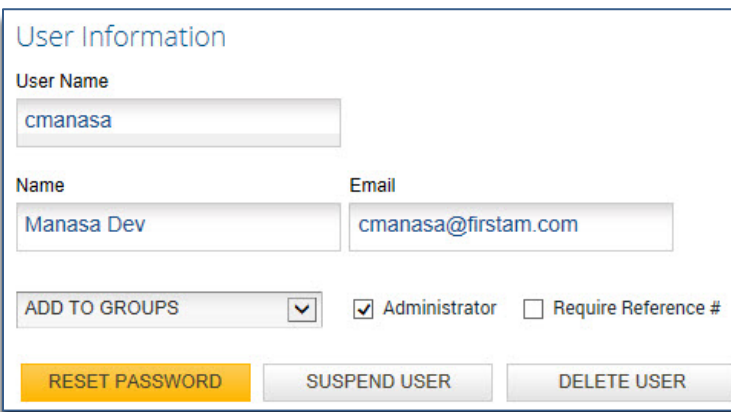
Your Users

Your Users provides a look up tool for usernames within a customer's account. An index of results will appear as a name or group is inputted.



User Information

When the customer Administrator clicks on a specific username, the details of the User Information will appear along with options for adding them to a group. The additional option for selecting a new Administrator and resetting, suspending or deleting access will be available.



Company Information

The Company Information section provides the customer with their Account ID number and options for either a four column or six column report format. User Preference can also be enabled from here.

Company Information

First American Data Tree
 4 First American Way
 address213
 Santa Ana, CA 92708
 Your Account ID: XXXXXXXXXX

Require Reference #

Report Format 4 Column 6 Column Enable User Preference

CANCEL
SAVE

View Activity

View Activity displays completed orders, including document images, transaction history and reports at no additional costs. This information can be exported in either .CSV or .TXT formats.

View Activity

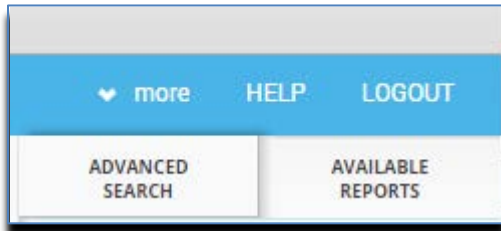
Select Month : ----- EXPORT DETAILS

Date	Last Transfer Document	Last Finance Document	Assessor Map	Transaction History Basic	Sales Comparison
3/6/2015	1	1	1	3	7
3/5/2015	7	7	5	22	27
3/4/2015	659	616	4	19	644
3/3/2015	6053	5537	8	33	5493
3/2/2015	1102	947	5	49	978
3/1/2015	1	1	-	1	2
Total Request	7823	7109	23	127	7151
Total Amount	\$7823.00	\$7109.00	\$23.00	\$127.00	\$7151.00
Grand Total					

For More Information:



You can access the online support features in DataTree by clicking on the Live Chat icon at the lower left hand corner of the DataTree window. The Feedback icon allows you to share your experience with us or provide suggestions.



E-Learning content, quick reference guides and other collateral can be found in Help menu at the top right.

For questions, please contact Client Services at 800-221-2056 or Email at datatrace-cs.sna.ca@edatatrace.com .



