Guide for Customer Administrators

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

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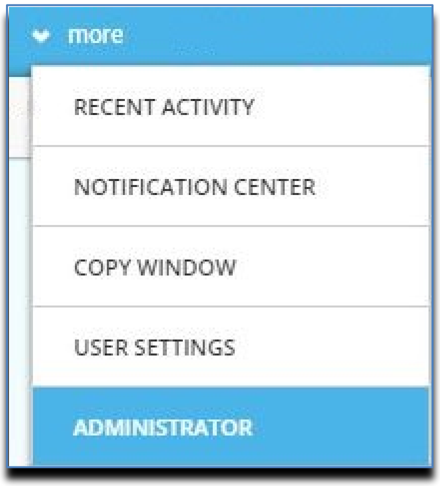
Client Administrator Overview

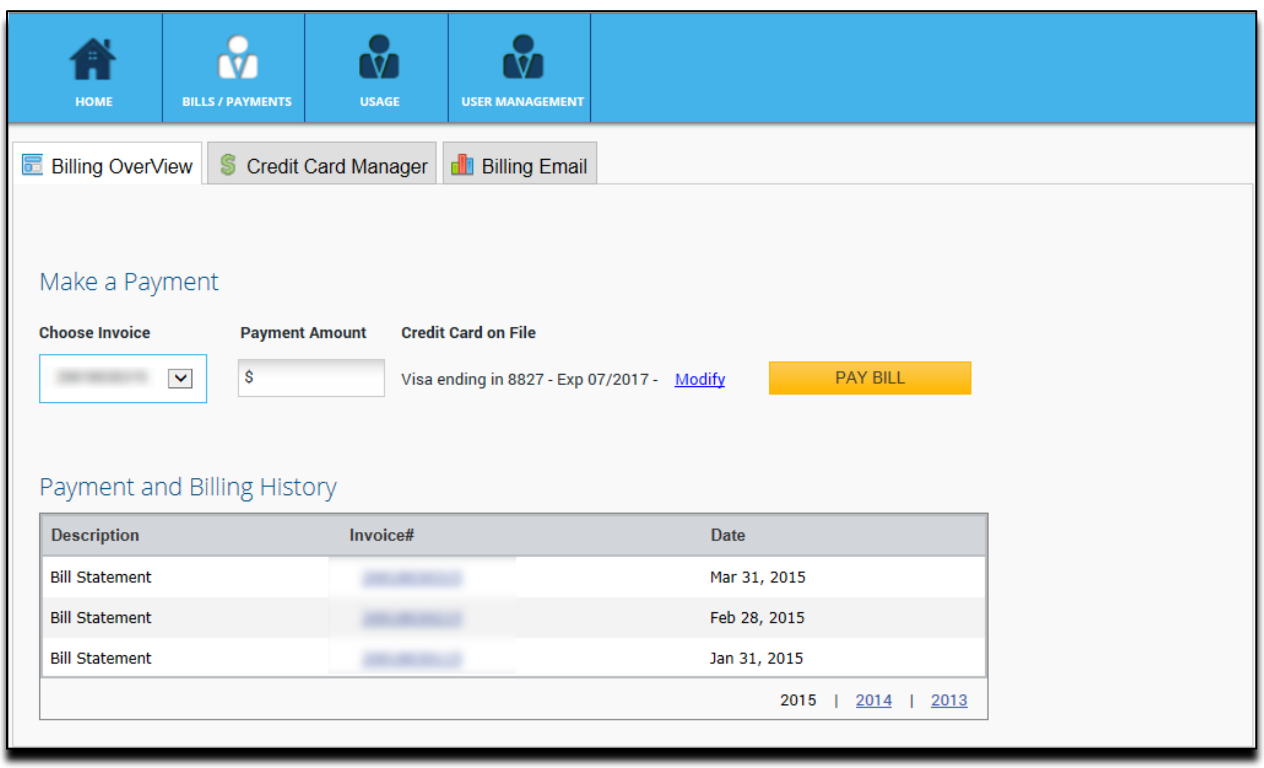
The Client Administrator will be able to manage their account in three areas:

- 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."

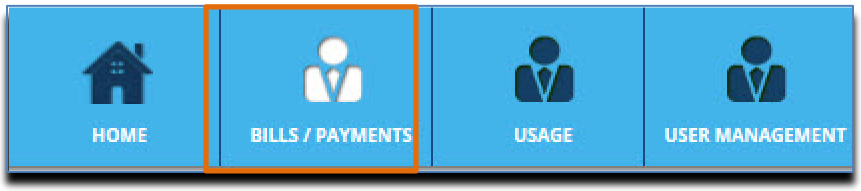


The customer administration home page will load, as shown here.



Bills/Payments

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

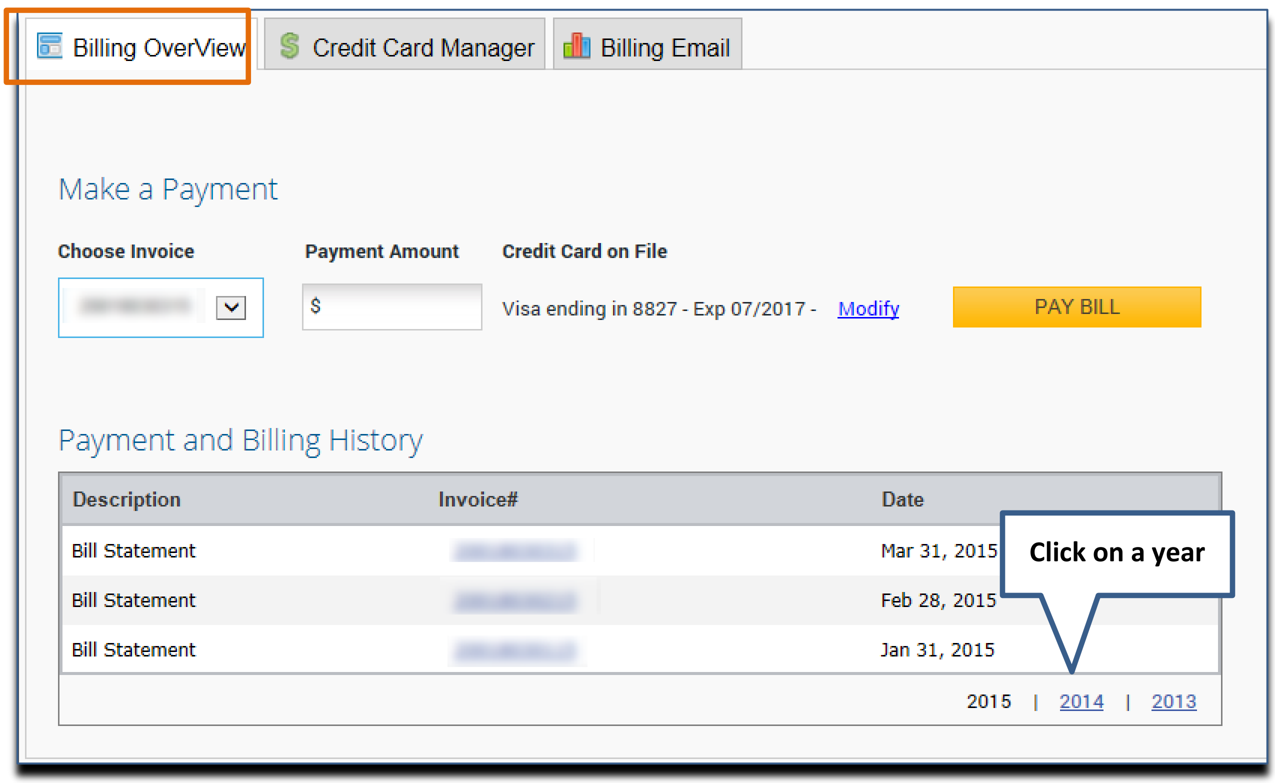


Billing Overview

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.

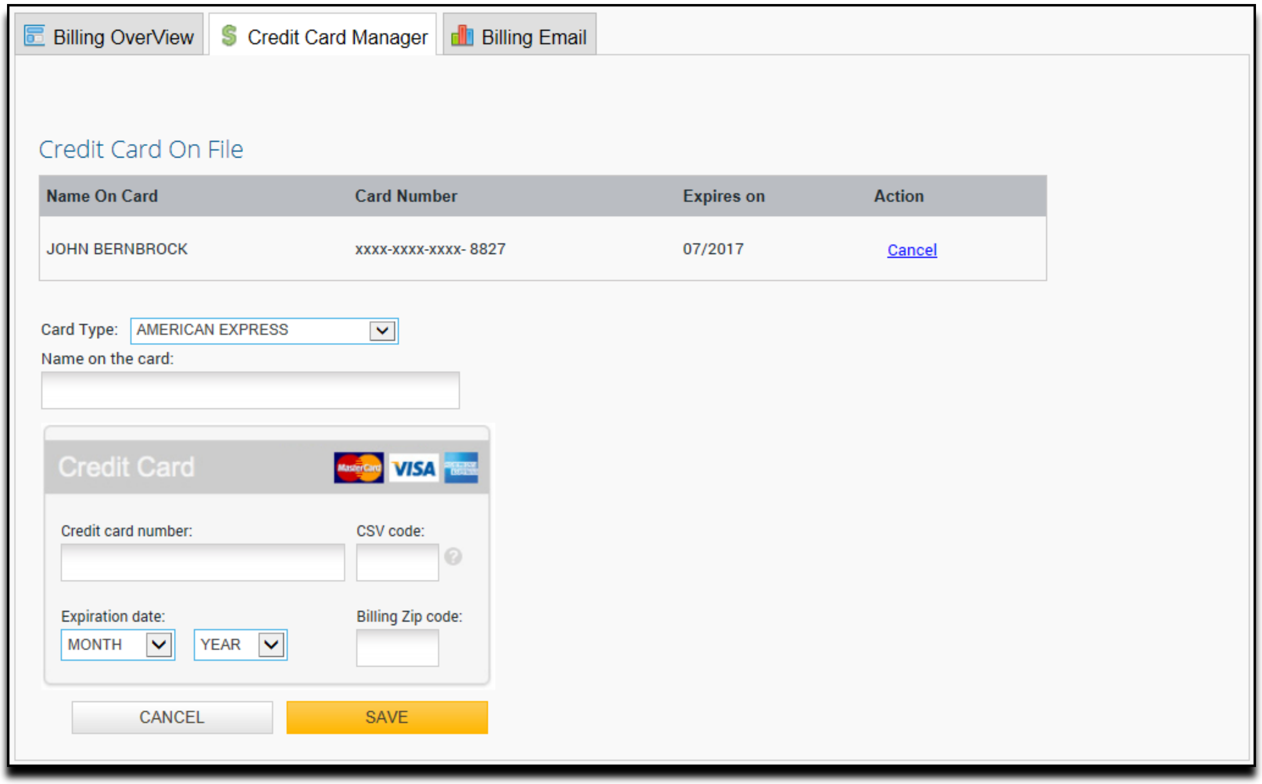
Payment and Billing History can be accessed by year. Click on a year to view the invoices for that year.

Click on an invoice number to view that invoice.



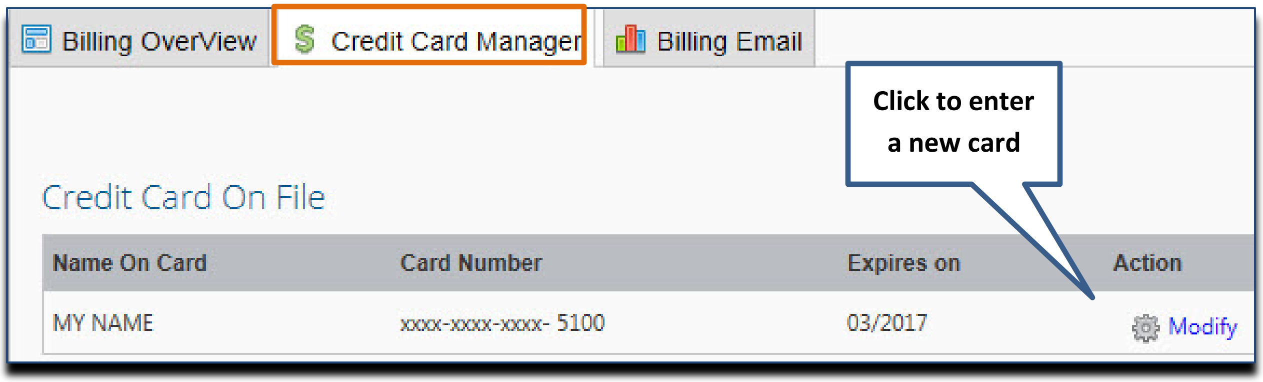
If you need to enter a new credit card, click the Modify link and enter the new information.

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



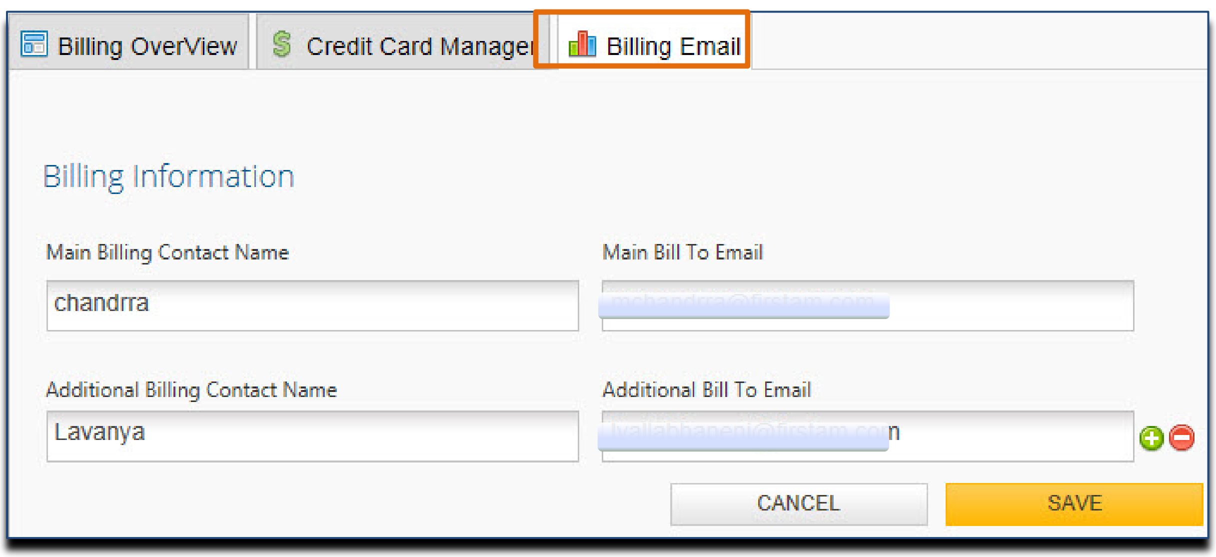
Credit Card Manager

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



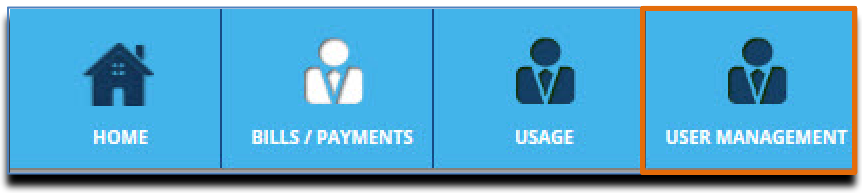
Billing Email

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



User Management

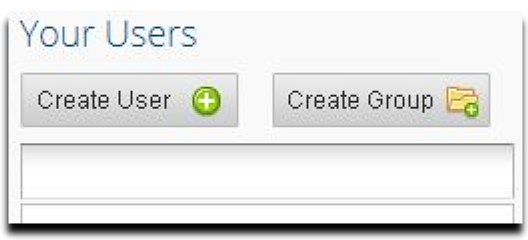
This section allows the Administrator to create and manage Users for your company and setup Groups to provide some organization by department, team, regional office, or other logical grouping.



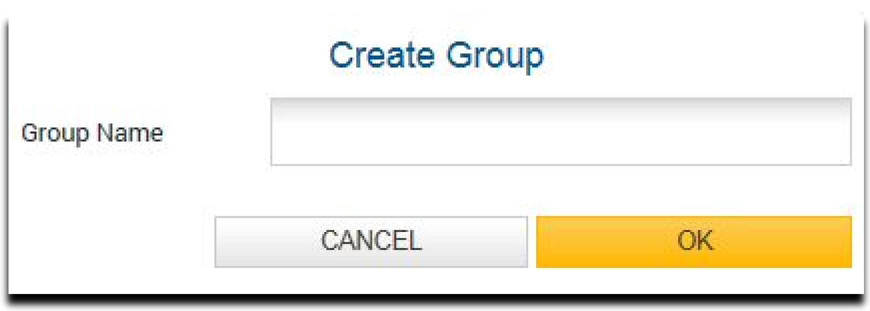
Creating Groups

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.

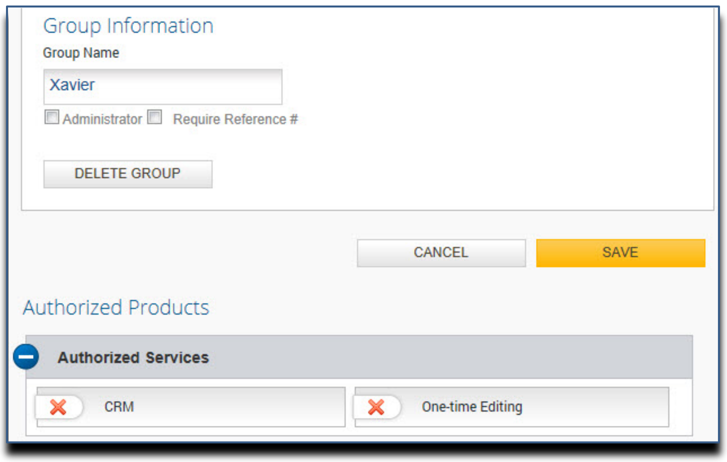


Once the group has been selected, they can be set as administrators, require reference #'s on searches and/or be deleted in the "Group Information" section.

Group Information

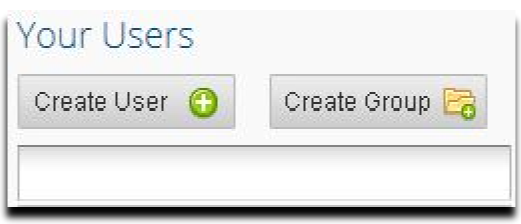
Upon the creation of a new Group, there will be additional access options with regards to authorized products and services. A group can add administrator level privileges, require the reference number when ordering documents or reports, or provide specific services to all members within the group.

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.

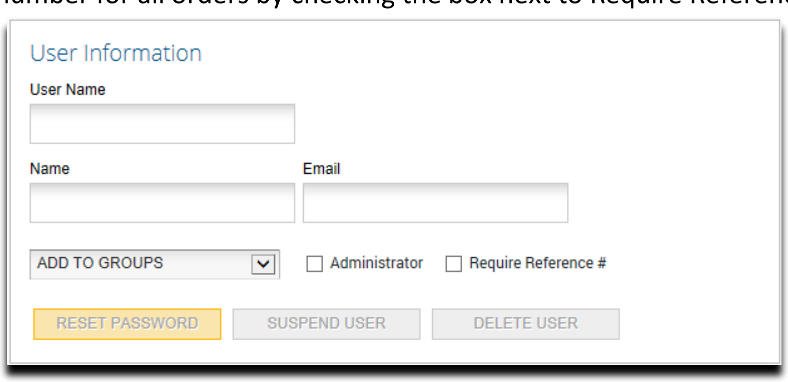


Create User

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.



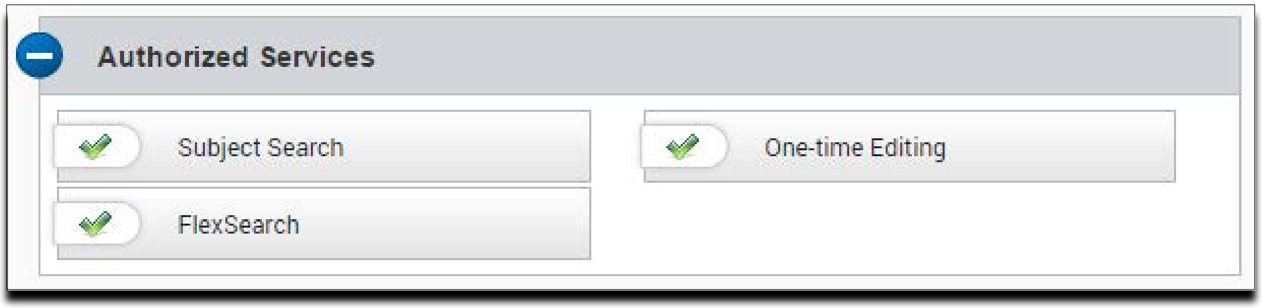
Complete the User Information including the username, name of the user, their email and group membership and whether or not this user will be an administrator. Finally, you can require a reference number for all orders by checking the box next to Require Reference #.



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.



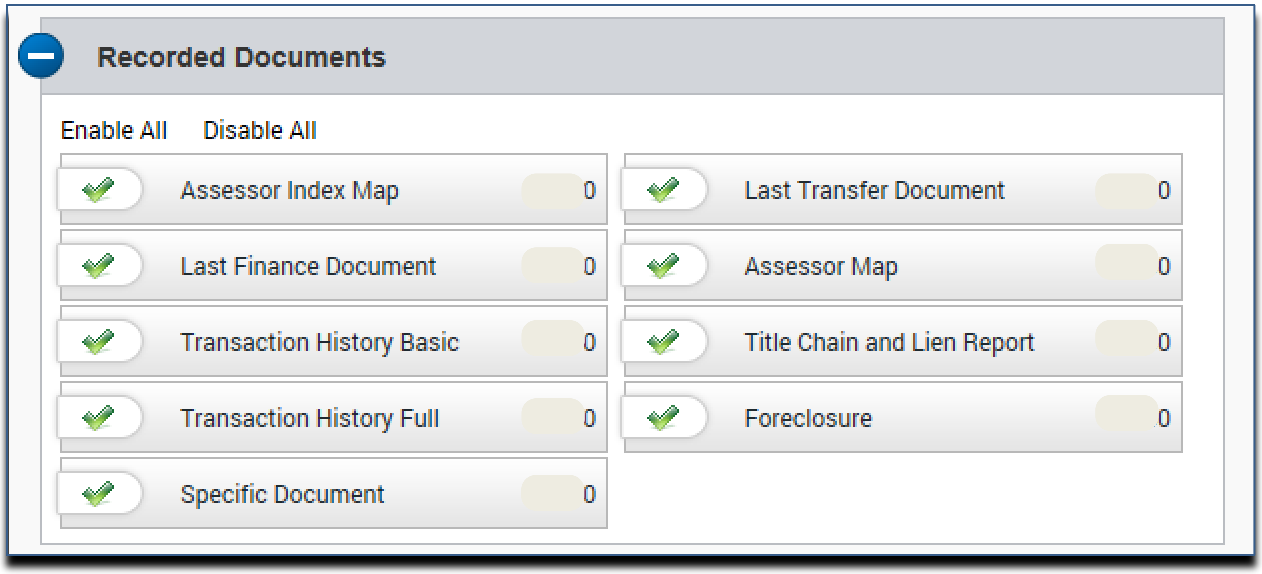
In the DataTree platform, FlexSearch and One-Time Editing features can be found here:

Location of FlexSearch:

Within the Property Detail report, One-Time Editing:

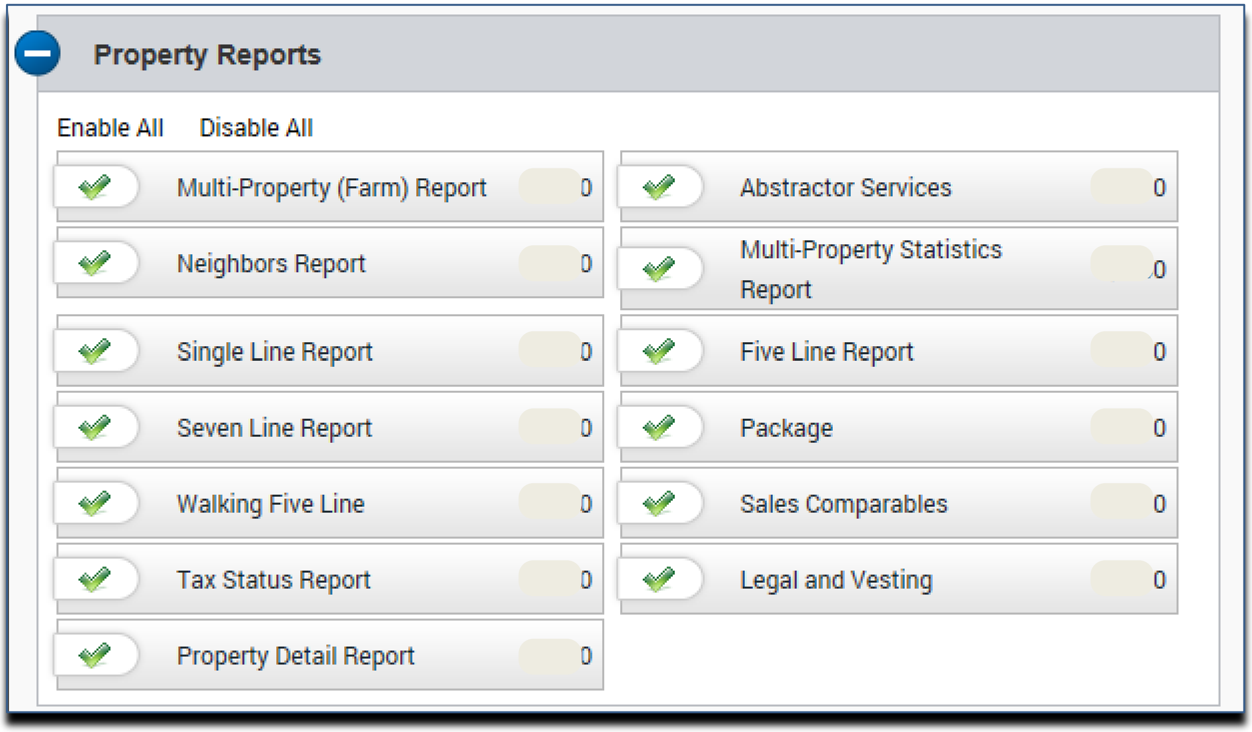
Recorded Documents:

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.



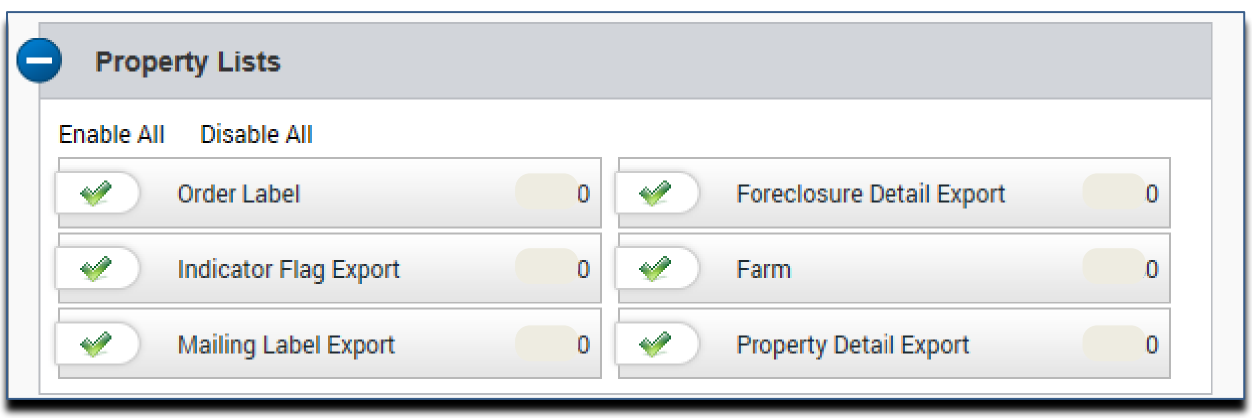
Property Reports

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.



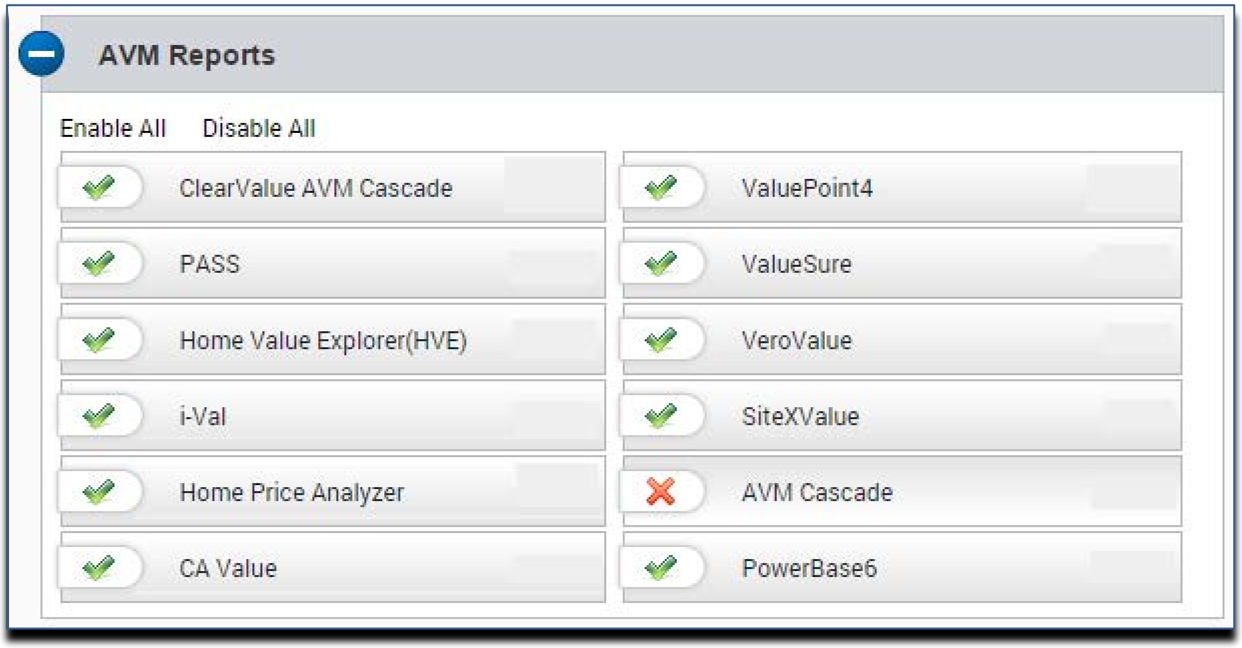
Property Lists:

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



AVM Reports:

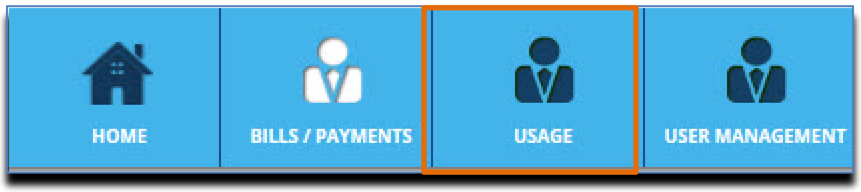
Enabling these options allows users to order a variety of AVMs that can be used for property valuations.



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.

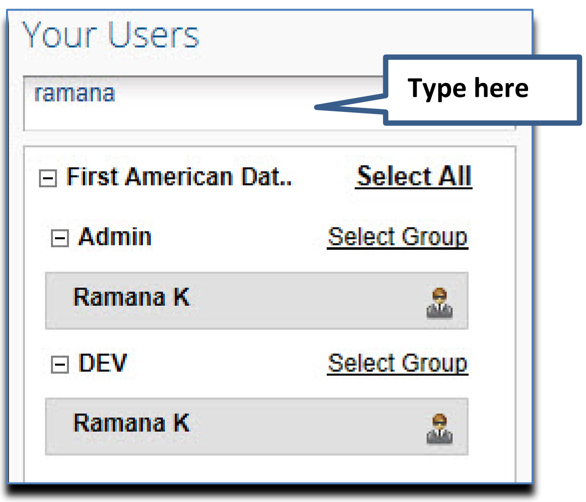
Usage

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.



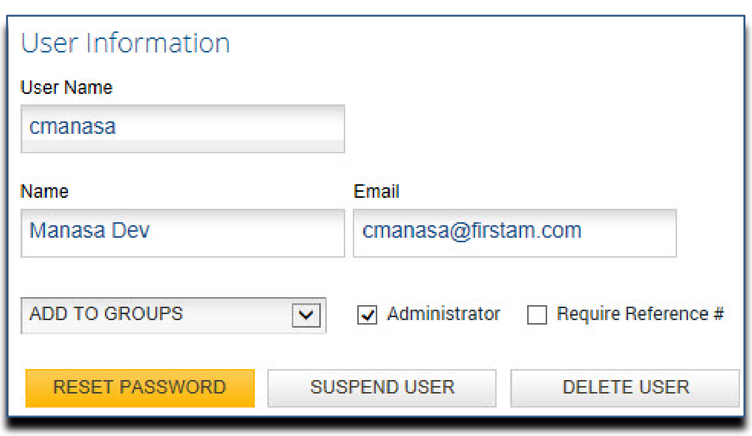
Your Users

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.



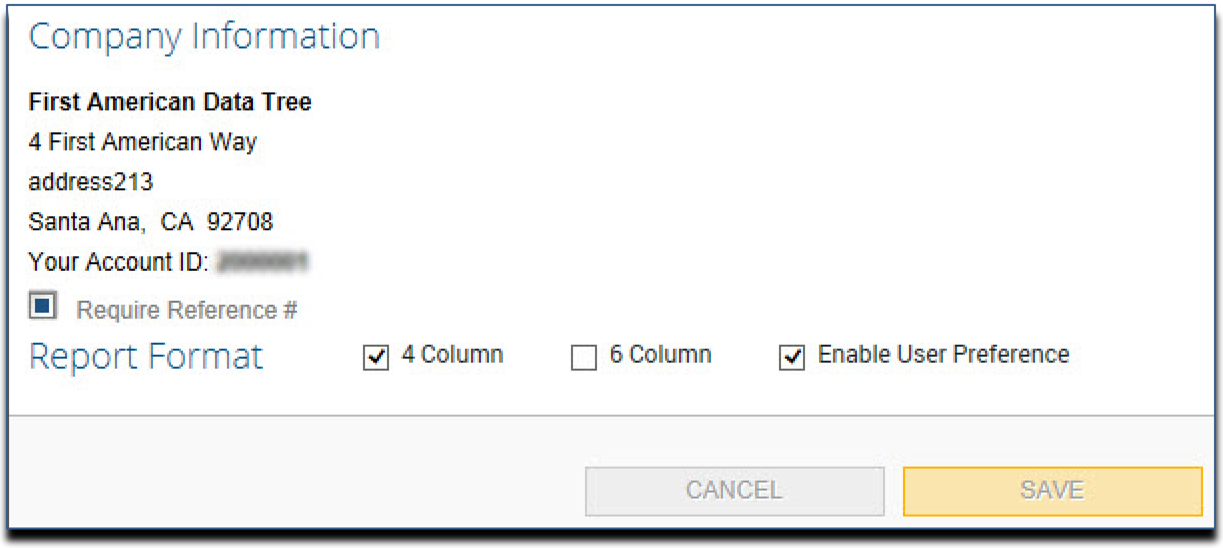
User Information

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.



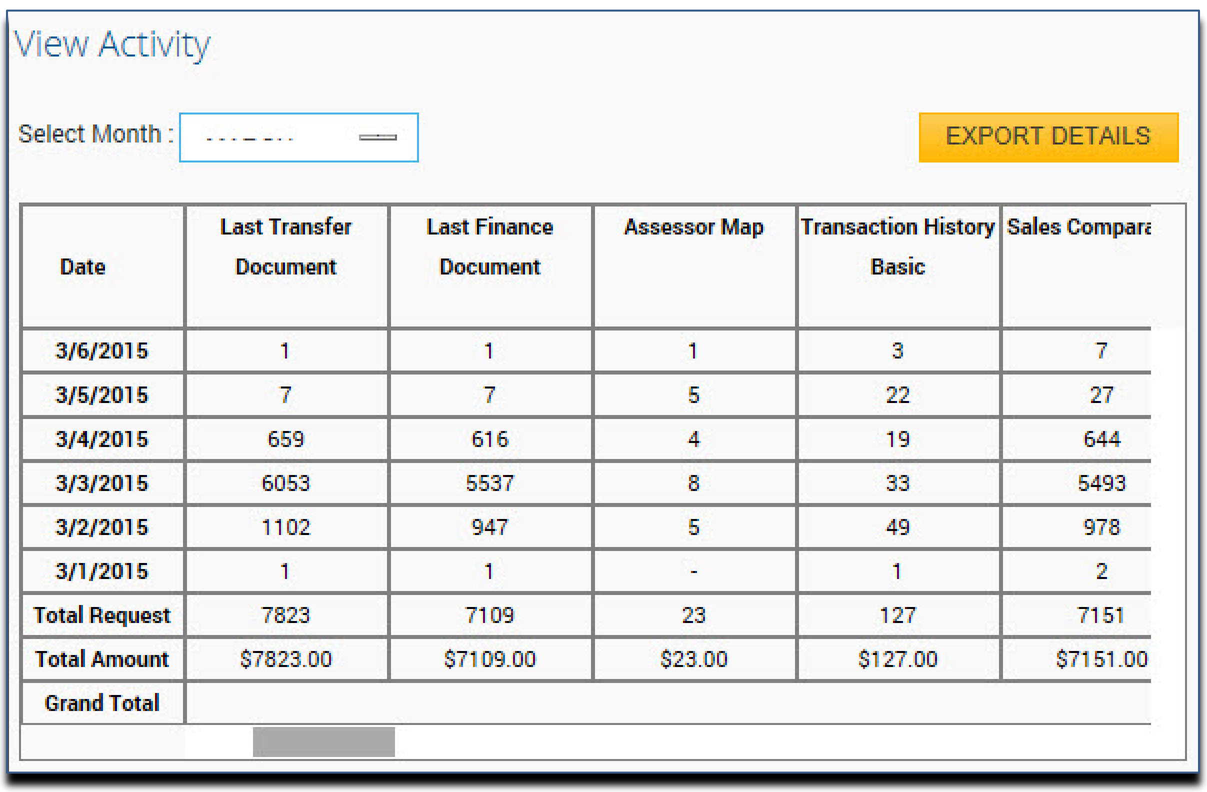
Company Information

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



View Activity

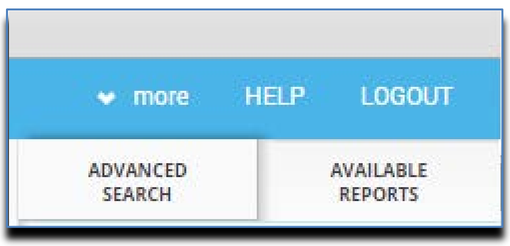
View Activity displays completed orders, including document images, transaction history and reports at no additional costs. This information can be exported in either .CSV or .TXT formats.



Date	Last Transfer Document	Last Finance Document	Assessor Map	Transaction History Basic	Sales Compara
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 .