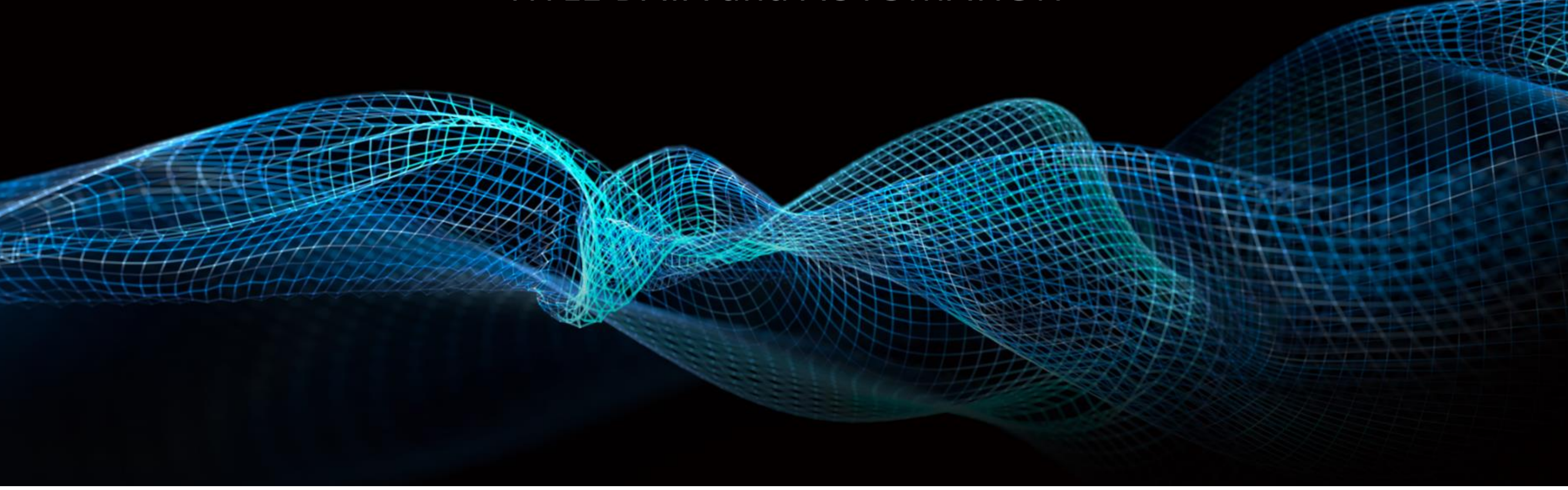
Innovations to GO BEYOND

TITLE DATA and AUTOMATION



ONBOARDING CUSTOMERS IN TITLEFLEX

Rev. 20200819

NOTE: Provisioning for TitleFlex is supported by the existing DataTree administration application; consequently, the provisioning screens will show references to the DataTree product.

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Table of Contents

OnBoarding Customers in DataTree and TitleFlex

This guide will focus on the required steps to bring a new customer online in either platform along with notes on specific options for DataTree and TitleFlex users. The same Administration tool will provision either platform.

Before You Begin

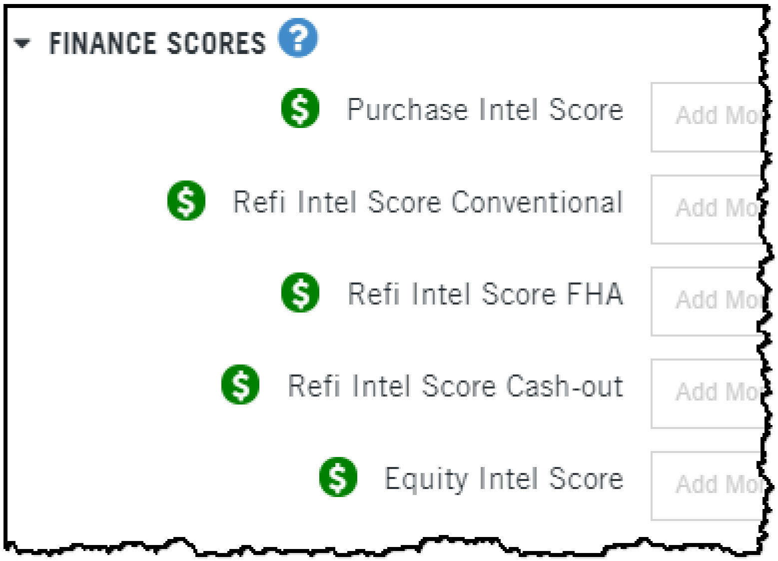
Services and features may be set for customers as follows:

☑ Batch Ordering	Product available and orderable in the left-hand panel of DataTree.
☐ Batch Ordering	Available for your contract but not enabled for your end-users. Click to put a check in the box and enable it for your users.

In Product:

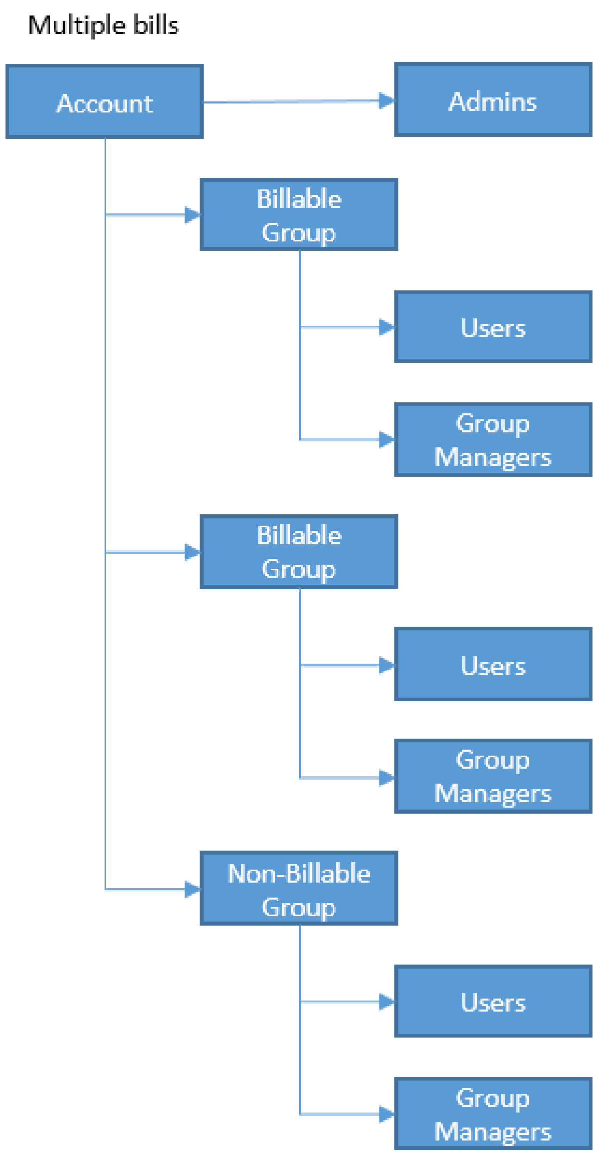
☑ Neighbors Report	Report is visible and can be ordered. 
▣ Neighbors Report	Report is visible but cannot be ordered. 
☐ Neighbors Report	Report is not visible. 

Some Advanced Filter options in the platform will be denoted with a dollar sign, as shown here:



These are premium filters and carry an additional per-record charge above the Property List charge. These are provisioned separately. In platform, the user will receive an additional dialog box warning them of the additional charge.

The platform allows the use of billable groups for situations where large clients need the individual business units to manage their own billing. It might be helpful to provide a graphic to describe how users and groups may be used in DataTree.



Top level admins can create groups, users, add new Admins or Group Managers. They can limit product access by group or user.

Groups inherit permissions from the parent account. Reports can be further limited by group so that each group provides users with only the reports necessary for their job.

Group Managers can have unique admin abilities, such as View only and can be set to admin-only which removes product access.

Billable groups have their own account number.

Note: Unique groups are not required. The scenario above depicts a situation where a customer may want unique groups that require their own billing.

The end of the manual includes an appendix on setting up the account for billable groups.

Creating New Accounts

The Internal Admin includes the ability to create an electronic EULA, provision companies and the client administrator, create trials, and (for sales approvers) approve custom pricing.

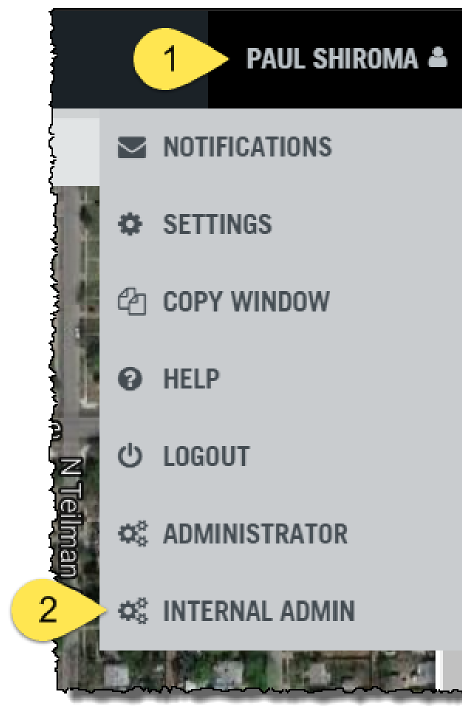
Overview

There are five general steps to provisioning a customer:

1. Enabling platform access
2. Enabling report access and pricing
3. Entering the client's company information, the company administrator, and your information
4. Securing custom pricing approval (only required for custom pricing from step two)
5. Client accesses platform

The document will review each step.

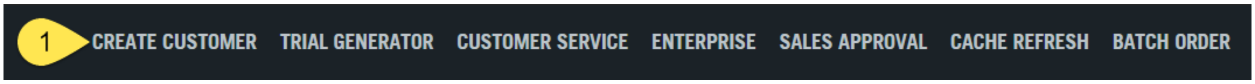
To access the Internal Admin features, log into the new DataTree.com, click the Administration Icon and then click Internal Admin.



Note: This manual starts with provisioning a customer without billable groups. See the Appendix on setting up billable groups.

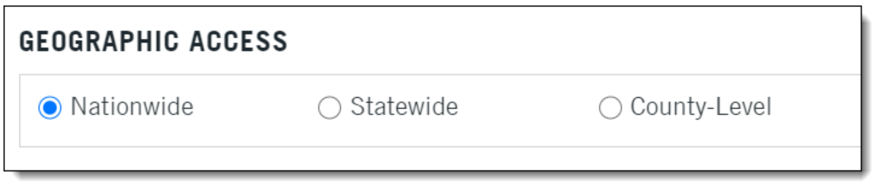
Enabling Platform and Search Access.

Click Create Customer to begin the process.

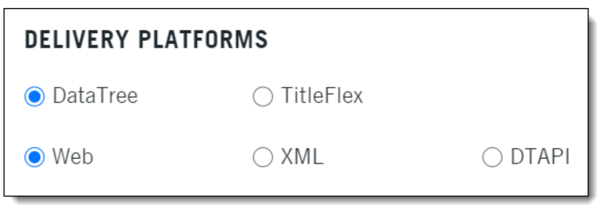


Geographic Access

Leave Nationwide selected, as shown.



Authorized Services



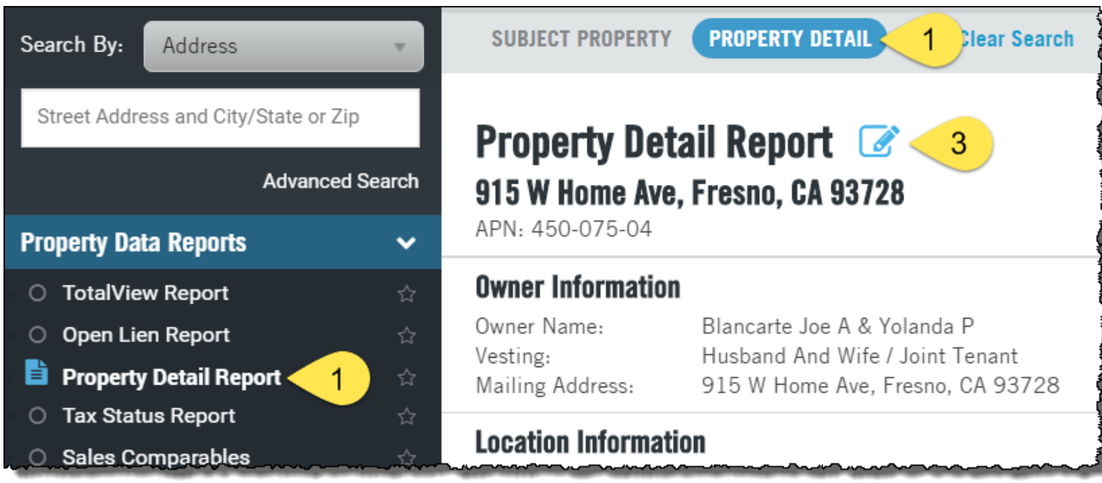
The first choice in the Authorized Services section is the most important as it sets up the application for either Title customers or non-Title customers. Select DataTree for non-Title customers or TitleFlex for Title Customers.

Next, enable or disable the following options. Recommendations for DataTree and TitleFlex are in the right-hand columns.

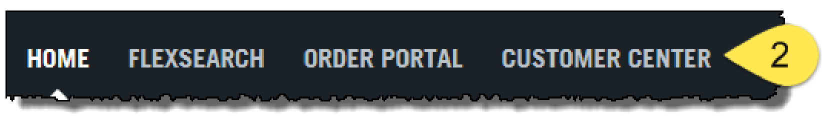
Feature	**Description**	**DataTree**	**TitleFlex**
1. Property Detail Auto Load	Auto-loads the Property Detail Report when a property is selected. This incurs a charge. Do not enable unless specifically requested by the client.	Disabled	Disabled.
2. CRM	Basic contact management functionality for Title customers	Disabled	Enabled
3. One-time Editing	Allows temporary changes to the Property Detail Report for printing purposes only.	Disabled	Enabled
4. Batch Ordering	Ability to run multiple addresses for reports and data appends..	Enabled	Enabled

Screenshots of where the features in the table above show up in the platform follow.

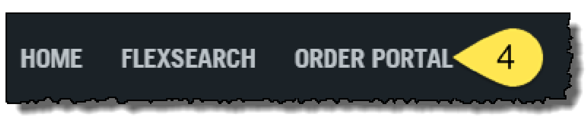
Property Detail Autoload (1) and One-Time Editing (3):



CRM (2) (for TitleFlex):

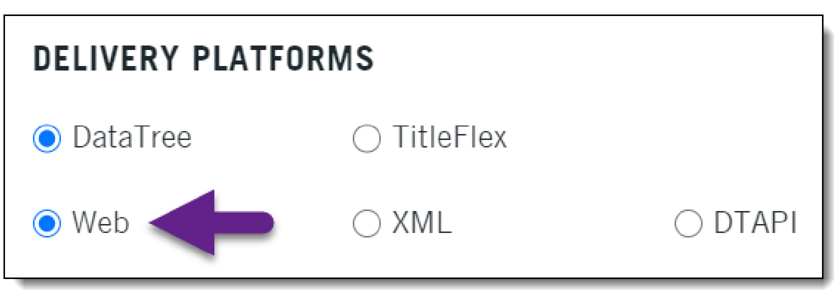


Batch Ordering (4):



Interface Access

Leave this as Web so that the customer can access DataTree or TItleFlex through a browser.



Provisioning Basic Reports

The pricing is broken into two parts: The Monthly Pricing Plan and feature access and their prices.

Monthly Pricing Plan:

Leave Monthly selected. No prepaid plans are available for new customers.

Next, select a monthly commitment plan (Custom or plans one through five) in the radio buttons at right. Selecting the Custom plan will allow you to setup a unique monthly minimum amount and specific report pricing. This will also trigger the system to send an email to your managed and the Finance team to approve your custom pricing. The client will not be able to access DataTree until all approvals are secured (described later in the document).

NOTE: Certain sales teams may require the credit card or prepay methods. If in doubt, check with your sales manager.

You may select Credit Card or Prepaid under the following circumstances:

- Select Credit Card ONLY if the client admin has credit card authorization. At first login, the system will require the client admin to enter the company credit card to complete the setup.
- Select Prepaid ONLY if the customer has already provided credit card authorization for a fixed amount credited to their account. All activity is drawn against that prepaid amount.

Features and Pricing

After selecting a monthly plan, you have the option to change the pricing for an individual report. If you select Custom pricing, you must manually enter all price points.

Complete the following sections: Recorded Documents, Property Reports, Property Lists, AVM Reports. Flood, Appraisal & Valuation, Property Ownership (O&E) and Fraud & Verification. Flood, Appraisal & Valuation, Property Ownership and Fraud & Verification require a hard-copy contract. See the Appendix: Managed Services Products for more information.

Click the section headers in the left-hand frame to switch to those sections and modify their options. If you need to change a per report price, click in the blank text box to the right of the report name and enter the custom price.

<u>Figure One</u>: Recorded Documents Screenshot:

<u>The Assessor Maps (De-Duplicated)</u>: Enable for all customers. This will ensure that a user is not charged for multiples of the same assessor map when ordering lists of properties that all fall in the same map. Make sure that the price inserted here is the same as the Assessor Map price in the Recorded Document section.

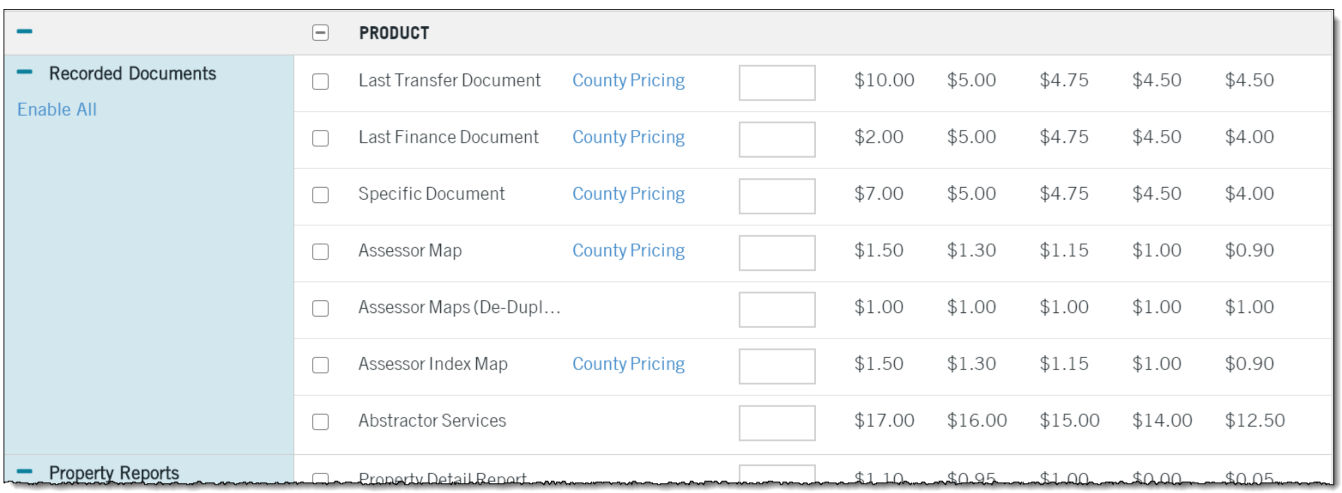


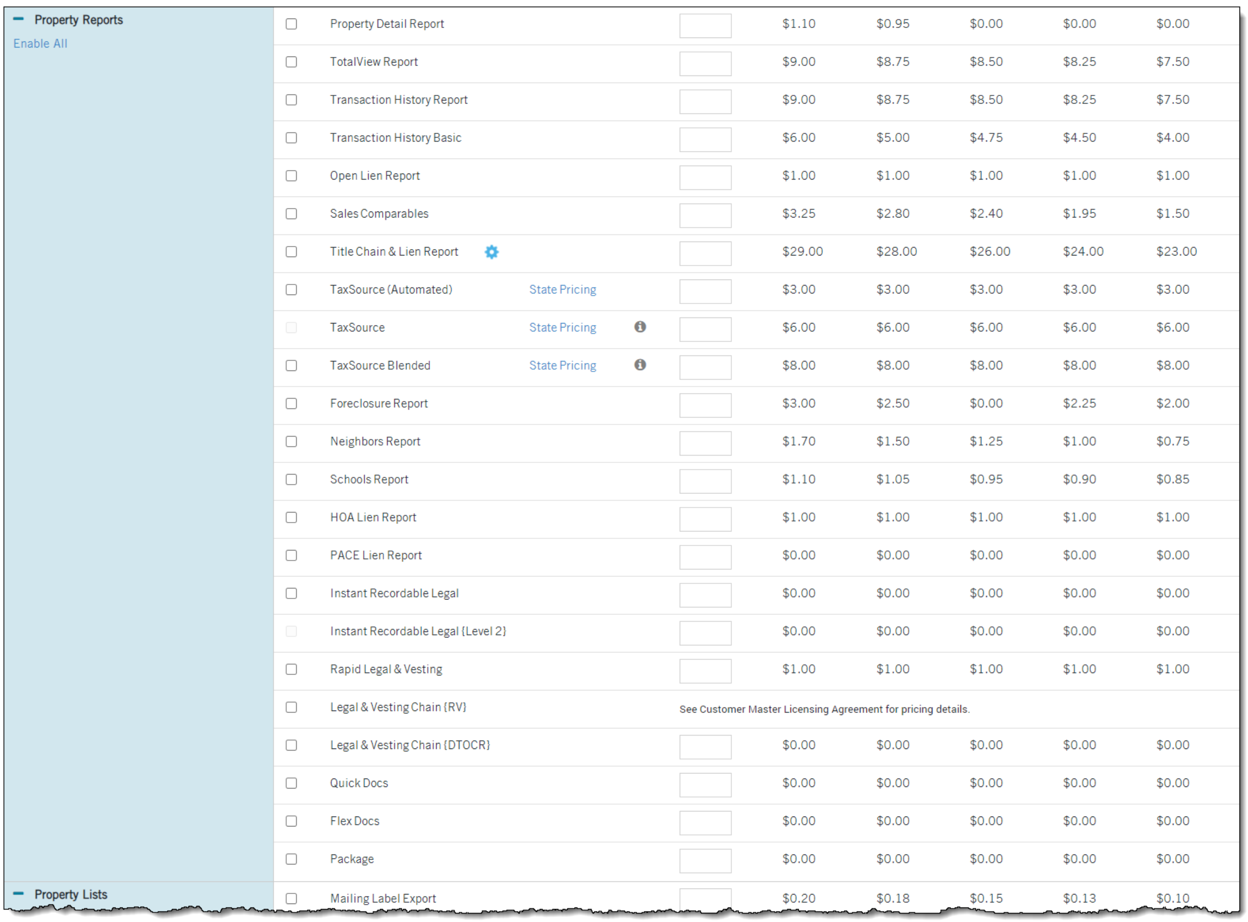
Figure Two: Property Reports Screenshots:

Notes:

Packages: Enable for TitleFlex customers. It is a service specific to the title industry. Optional for all other customers.

Quick Docs: Leave disabled. This is a custom service specifically for certain lending customers and is not to be used for anyone else.

Tax Source: For clients configured with automated-only counties, select **Tax Source (Automated.)** For clients that include manual counties, select **both TaxSource (Automated)** and **TaxSource**. If a client has negotiated a SOW for a single rate for auto and manual, use the **TaxSource Blended** option. Pricing for all three is configured at the state level.



− Property Reports Enable All	Property Detail Report		$1.10	$0.95	$0.00	$0.00	$0.00
	TotalView Report		$9.00	$8.75	$8.50	$8.25	$7.50
	Transaction History Report		$9.00	$8.75	$8.50	$8.25	$7.50
	Transaction History Basic		$6.00	$5.00	$4.75	$4.50	$4.00
	Open Lien Report		$1.00	$1.00	$1.00	$1.00	$1.00
	Sales Comparables		$3.25	$2.80	$2.40	$1.95	$1.50
	Title Chain & Lien Report		$29.00	$28.00	$26.00	$24.00	$23.00
	TaxSource (Automated)	State Pricing	$3.00	$3.00	$3.00	$3.00	$3.00
	TaxSource	State Pricing	$6.00	$6.00	$6.00	$6.00	$6.00
	TaxSource Blended	State Pricing	$8.00	$8.00	$8.00	$8.00	$8.00
	Foreclosure Report		$3.00	$2.50	$0.00	$2.25	$2.00
	Neighbors Report		$1.70	$1.50	$1.25	$1.00	$0.75
	Schools Report		$1.10	$1.05	$0.95	$0.90	$0.85
	HOA Lien Report		$1.00	$1.00	$1.00	$1.00	$1.00
	PACE Lien Report		$0.00	$0.00	$0.00	$0.00	$0.00
	Instant Recordable Legal		$0.00	$0.00	$0.00	$0.00	$0.00
	Instant Recordable Legal (Level 2)		$0.00	$0.00	$0.00	$0.00	$0.00
	Rapid Legal & Vesting		$1.00	$1.00	$1.00	$1.00	$1.00
	Legal & Vesting Chain (RV)		See Customer Master Licensing Agreement for pricing details.				
	Legal & Vesting Chain (DTOCR)		$0.00	$0.00	$0.00	$0.00	$0.00
	Quick Docs		$0.00	$0.00	$0.00	$0.00	$0.00
	Flex Docs		$0.00	$0.00	$0.00	$0.00	$0.00
	Package		$0.00	$0.00	$0.00	$0.00	$0.00
− Property Lists	Mailing Label Export		$0.20	$0.18	$0.15	$0.13	$0.10

Figure Three: Property Lists Screenshots:

Notes:

Farms: Enable for TitleFlex customers or customers using the Customer Center.

− Property Lists Enable All	☐	Mailing Label Export		$0.20	$0.18	$0.15	$0.13	$0.10
	☐	Property Characteristics…		$0.50	$0.42	$0.36	$0.29	$0.22
	☐	Property Detail Export		$1.00	$0.85	$0.72	$0.58	$0.45
	☐	Open Lien Export Add-on		$1.00	$1.00	$1.00	$1.00	$1.00
	☐	PACE Liens Export Add-on		$1.00	$1.00	$1.00	$1.00	$1.00
	☐	HOA Lien Export Add-on		$5.50	$5.23	$4.95	$4.68	$4.40
	☐	HOA Contact Export Ad…		$0.50	$0.48	$0.45	$0.43	$0.40
	☐	Foreclosure Detail Expo…		$0.00	$0.00	$0.00	$0.00	$0.00
	☐	Finance Scores Export A…		$0.50	$0.24	$0.23	$0.21	$0.20
	☐	Mailing Labels		$0.20	$0.18	$0.15	$0.13	$0.10
	☐	Single Line Report		$1.30	$0.25	$0.22	$0.17	$0.13
	☐	Five Line Report		$0.30	$0.25	$0.22	$0.17	$0.13
	☐	Seven Line Report		$0.30	$0.25	$0.22	$0.17	$0.13
	☐	Walking Five Line Report		$0.30	$0.25	$0.22	$0.17	$0.13
	☐	Market Statistics Report		$0.50	$1.00	$0.00	$0.00	$0.00
	☑	SaveSearch		$0.00	$0.00	$0.00	$0.00	$0.00
	☐	Indicator Flag		$0.00	$0.00	$0.00	$0.00	$0.00
	☐	Farm		$0.00	$0.00	$0.00	$0.00	$0.00
− AVM Reports	☐	Realtors Valuation Model		$13.00	$13.00	$13.00	$13.00	$13.00

Figure Four: AVM Reports Screenshot:

Customers may have specific AVMs they use. Provision as appropriate.

AVM Reports Enable All	Realtors Valuation Model		$13.00	$13.00	$13.00	$13.00	$13.00
	CA Value MC		$12.00	$12.00	$12.00	$12.00	$12.00
	Advantage Cascade		$1.00	$1.00	$1.00	$1.00	$1.00
	ClearValue AVM Cascade		$12.00	$12.00	$12.00	$12.00	$12.00
	ValuEdge Cascade		$1.00	$1.00	$1.00	$1.00	$1.00
	Custom AVM Cascade		$12.00	$12.00	$12.00	$12.00	$12.00
	CA Value		$12.00	$12.00	$12.00	$12.00	$12.00
	DataTree AVM		$11.00	$11.00	$11.00	$11.00	$11.00
	Home Value Explorer(H…		$10.00	$10.00	$10.00	$10.00	$10.00
	i-Val		$13.00	$13.00	$13.00	$13.00	$13.00
	PASS		$15.00	$15.00	$15.00	$15.00	$15.00
	SafeValue		$13.00	$13.00	$13.00	$13.00	$13.00
	SiteXValue		$13.00	$13.00	$13.00	$13.00	$13.00
	ValuePoint4		$15.00	$15.00	$15.00	$15.00	$15.00
	ValueSure		$13.00	$13.00	$13.00	$13.00	$13.00
	VeroValue		$12.00	$12.00	$12.00	$12.00	$12.00
	VeroValue Advantage		$12.00	$12.00	$12.00	$12.00	$12.00
	VeroValue Preferred		$12.00	$12.00	$12.00	$12.00	$12.00
GIS Layers	For Sale						

Figure Five: GIS Map Layers

Enable all features for all customers.

<u>Figure Six</u>: Flood, Valuations and Fraud products:

If you are provisioning a new customer for any of the following products

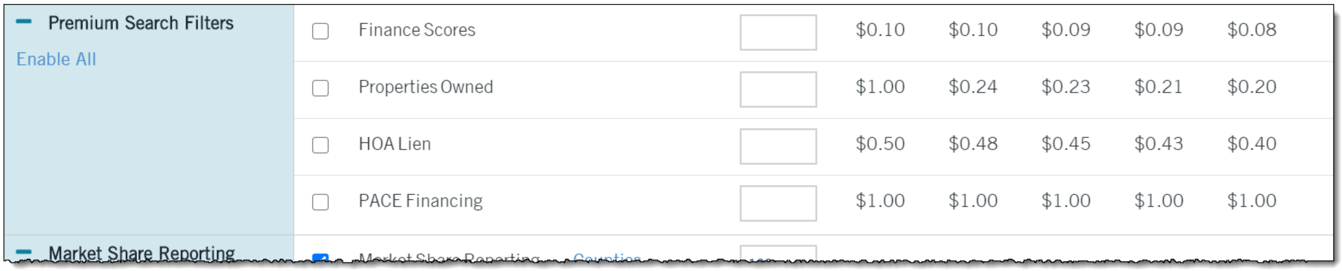
- Flood Reports
- Appraisal & Valuation
- Property Ownership (O&E)

A Master License Agreement will be required.

Please see Appendix One for specific provisioning information.

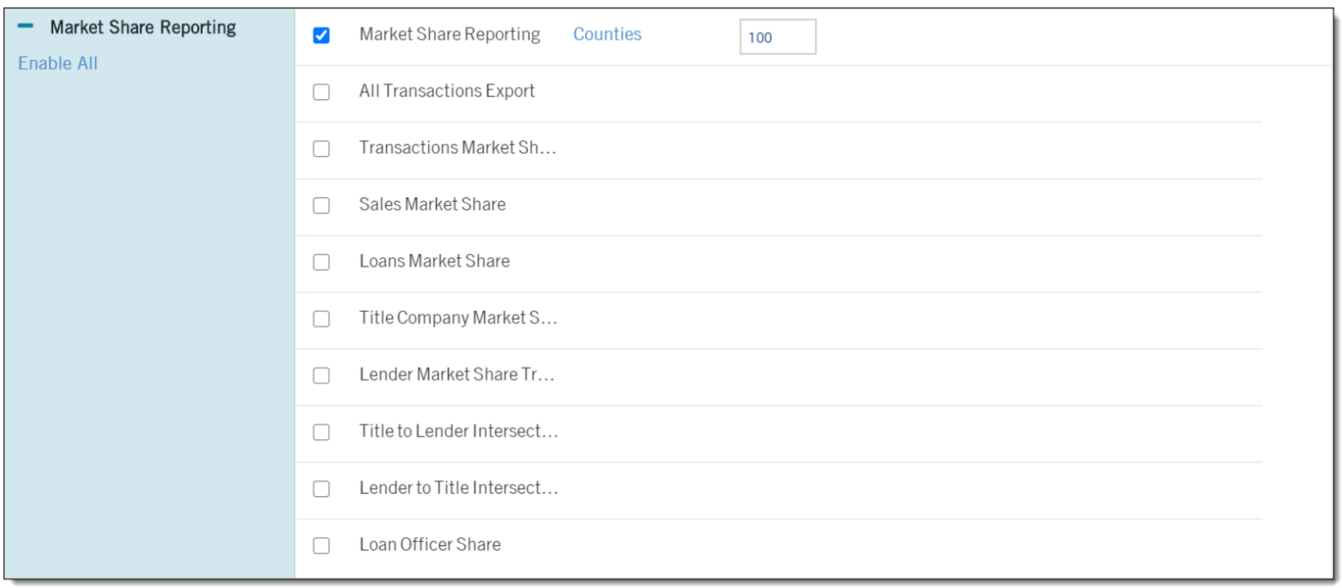
Flood Reports Enable All	Basic Flood + Census (L…	See Customer Master Licensing Agreement for pricing details.
	Life of Loan + Census (L…	See Customer Master Licensing Agreement for pricing details.
Appraisal & Valuation Enable All	Property Inspection (MAC)	See Customer Master Licensing Agreement for pricing details.
	Property Inspection Int (…	See Customer Master Licensing Agreement for pricing details.
	Field Review (FNMA 20…	See Customer Master Licensing Agreement for pricing details.
	Desktop Review (FNMA …	See Customer Master Licensing Agreement for pricing details.
	Std Appraisal (FNMA 1…	See Customer Master Licensing Agreement for pricing details.
	FHA Appraisal (FNMA 1…	See Customer Master Licensing Agreement for pricing details.
	Appraisal Update (FNM…	See Customer Master Licensing Agreement for pricing details.
	Std Appraisal (FNMA 2…	See Customer Master Licensing Agreement for pricing details.
	Int Inspection (FNMA 2…	See Customer Master Licensing Agreement for pricing details.
	Condo Int (FNMA 1073)	See Customer Master Licensing Agreement for pricing details.
	Condo Ext (FNMA 1075)	See Customer Master Licensing Agreement for pricing details.
	Vacant Land Appraisal	See Customer Master Licensing Agreement for pricing details.
	Operating Inc Stmt (FN…	See Customer Master Licensing Agreement for pricing details.
	Comp Rent Sched (FNM…	See Customer Master Licensing Agreement for pricing details.
	Small Income (FNMA 1…	See Customer Master Licensing Agreement for pricing details.
	Damage Verification - Ext	See Customer Master Licensing Agreement for pricing details.
	Damage Verification - Int	See Customer Master Licensing Agreement for pricing details.
Property Ownership (O&E) Enable All	O&E- Current Owner	See Customer Master Licensing Agreement for pricing details.
	O&E- Two Owner	See Customer Master Licensing Agreement for pricing details.
	Enhanced O&E	See Customer Master Licensing Agreement for pricing details.
	O&E- Current Owner (Re…	See Customer Master Licensing Agreement for pricing details.
	O&E- Two Owner (RedVi…	See Customer Master Licensing Agreement for pricing details.
	Marital Property Report	See Customer Master Licensing Agreement for pricing details.
Fraud & Verification Enable All	Product Links	$2.00 $1.00 $1.00 $1.00 $1.00
Premium Search Filters		

Figure Seven: Premium Search Filters:



These options are part of the Advanced Filters and are used for building direct mail lists. A user will incur additional per-record charges should they be ordered in the Filters.

Figure Eight: **MarketView (Market Share) Reporting**

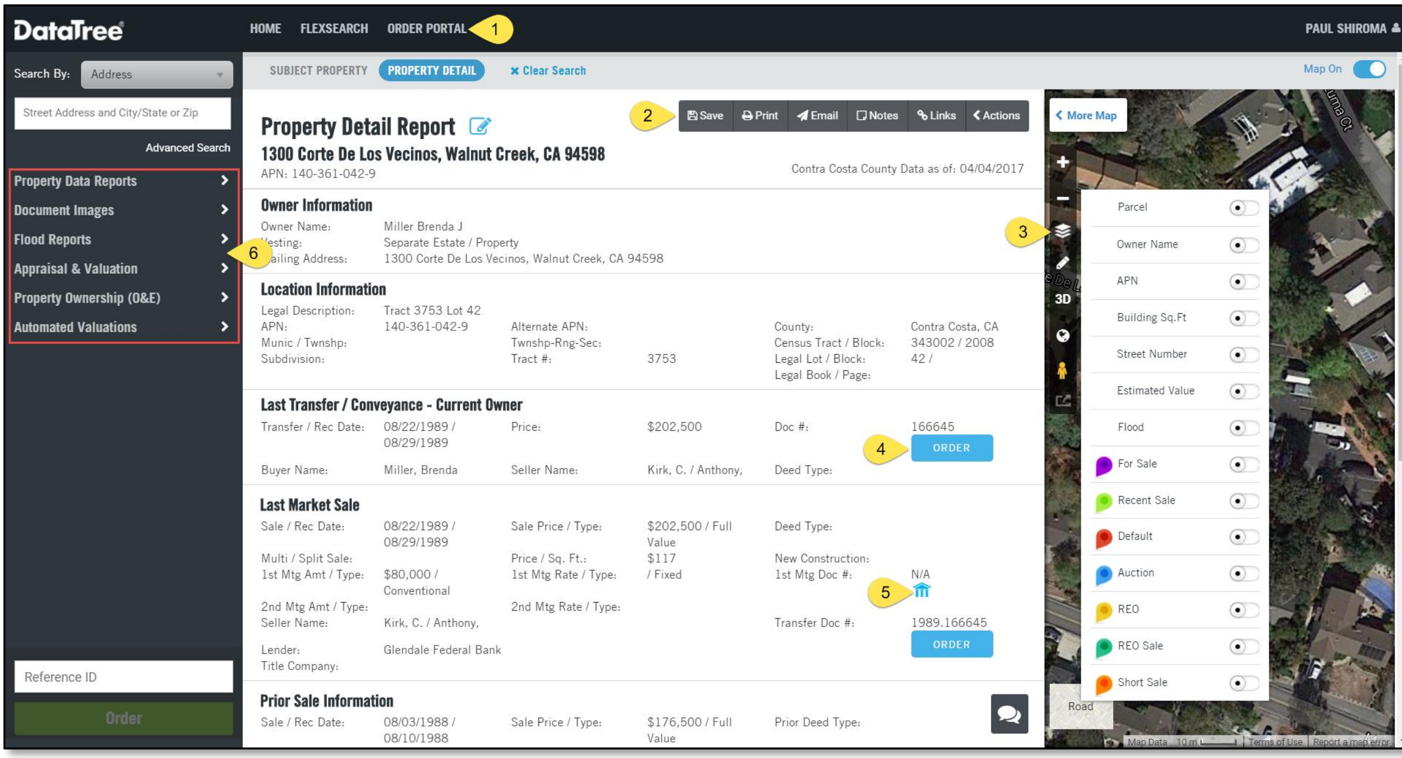


The **Market Share Reporting** option needs to be enabled for the user to have access to any of the reports/exports. There are three provisioning "states" for MarketView:

1. Disabled: the Market Share Reporting box is unchecked.
2. Promotional/Marketing: The Market Share Reporting box is checked, and all others are unchecked.
3. Enabled: The Market Share Reporting box is checked and at least one export/report is checked.

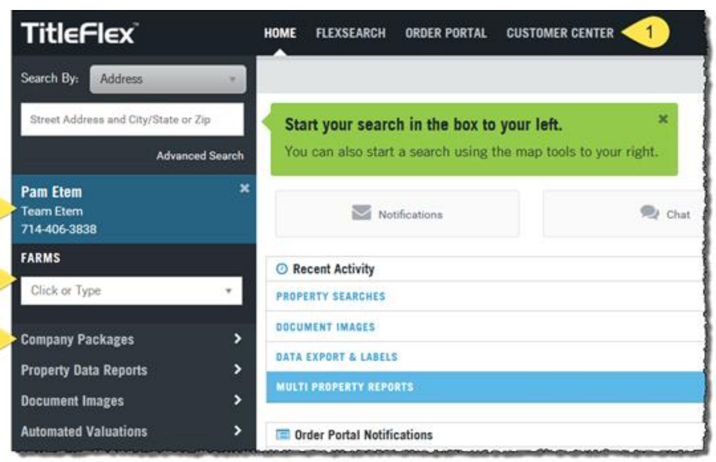
Users will need to be provisioned by State/County using the **Counties** link in accordance with their contract.

The selections enabled in Authorized Services and in Figures one through six affect what is available in DataTree, generally shown here.



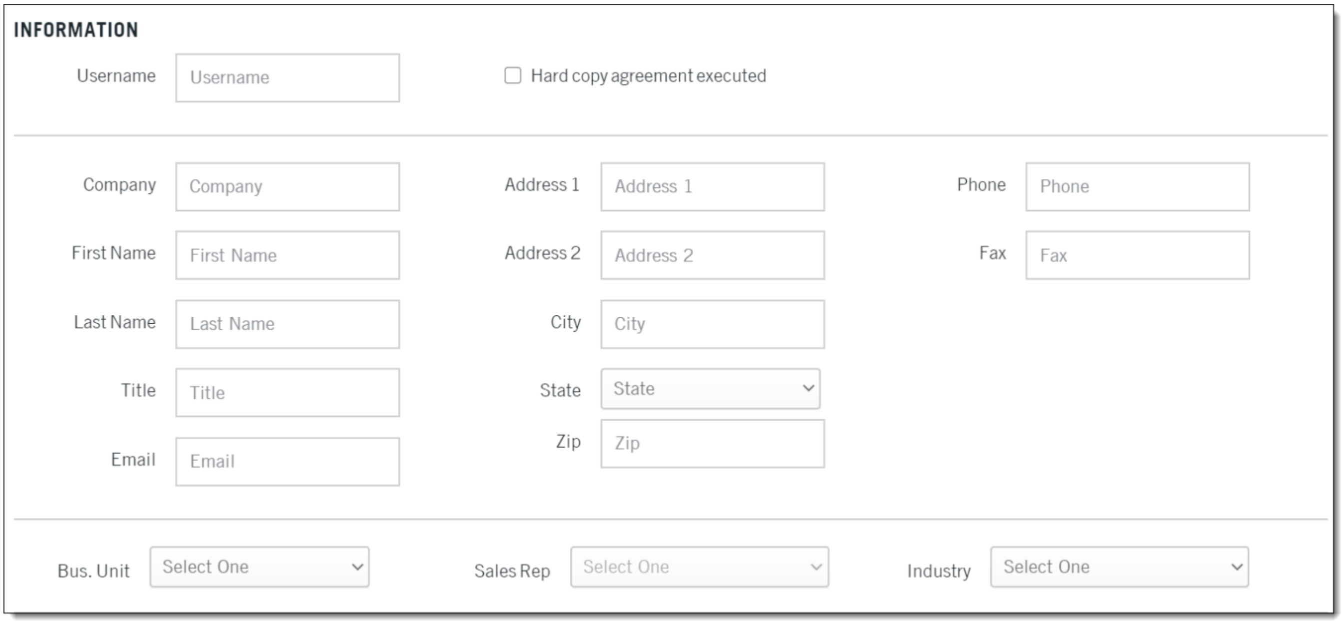
The selections enabled for a TitleFlex customer gives them the ability to setup customers (1, 2), farms (3) and packages (4).

All other functionality remains equivalent to DataTree.



Note: Any customer can make use of the Customer Center, Farms, and Packages. While the features were built primarily for the Title industry, they can be utilized by any customer.

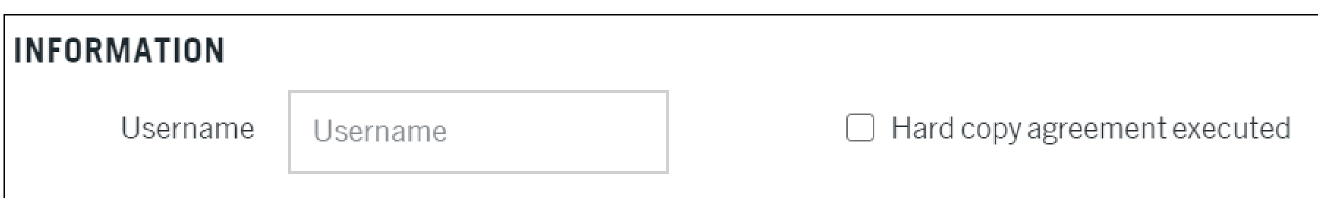
Company Information



Enter the following information:

- The username will be the client's administrator account.
- All customer information.
- Business Unit: Select your unit. (e.g. DBS, FAMS or Interthinx.)
- Sales Rep: This is dependent upon the Business Unit selection. Your name will not appear unless you select your Business Unit.
- **NOTE: Selecting your name affects two things:**
    - Your commission (make sure your name is entered).
    - You will be CC'ed on the system correspondence to the customer, so you know when emails go out.
    - Complete the Industry

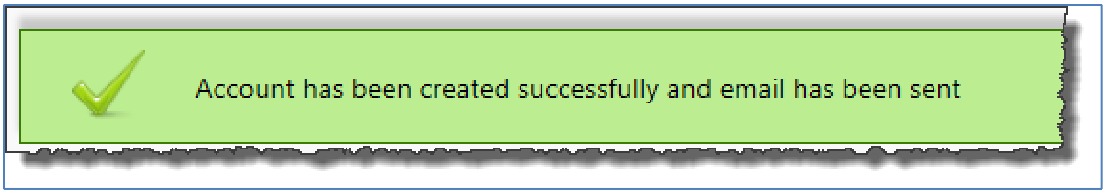
NOTE: "Hard copy agreement has been executed" is <u>disabled</u> by default, meaning the customer is going to accept the online EULA (a click-thru). If the customer is receiving a hard copy agreement for wet signature, enable this option by clicking the checkbox.



They must still accept pricing. See the Client Experience Section (following) to see how this choice affects the client administrator's first login.

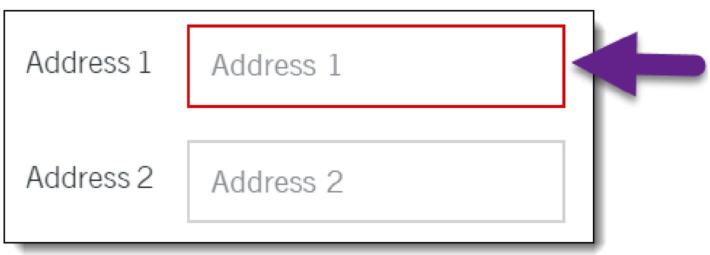
Click Save at the bottom of the form:

If you have correctly entered all required fields, you will receive the following confirmation:



If there is a missing field, you will receive the following message. Please correct the highlighted fields.

Example:



The highlighting is a bit faint so look carefully.

Client Accesses Platform:

The client administrator will receive two emails, one with their username (that you entered in the company information section) and one with a system-generated password. See Appendix items one and two for copies of the emails. At their first login, the client administrator will have a slightly different experience based upon the following:

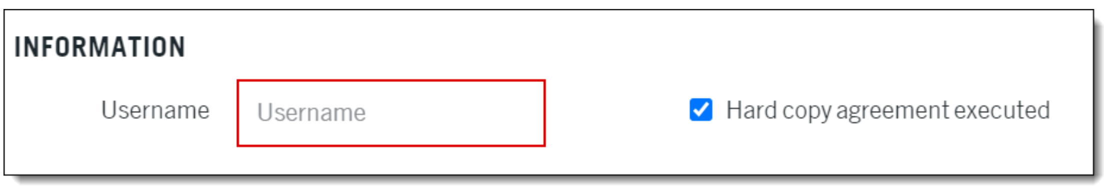
Hard Copy Agreement has NOT been executed:

If the option shown in the screenshot is disabled (red x), at their first login, the client will be:

- Prompted to change their password
- Accept the EULA
- Accept pricing

This is the default. A PDF copy of the EULA is in the Appendix at the end of this document.

Hard Copy Agreement HAS BEEN executed:



If the hard copy agreement has been executed is enabled, as shown here, the client administrator will:

- Not be presented with the online EULA
- Have to accept the pricing.

Once the client administrator has accepted the pricing (and EULA per the first option), you, your sales manager, and the customer will receive a confirmation email (along with a pdf version of the EULA per the first option).

See the appendix for a copy of the confirmation email.

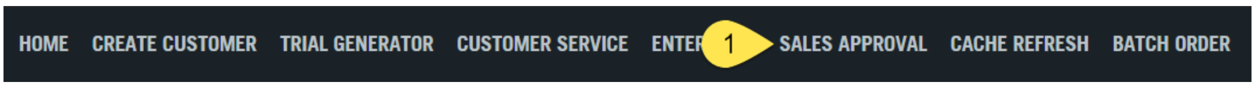
Sales Approval

NOTE: This process is only required when custom pricing has been entered and will be completed by approver staff (e.g. Finance, Management, etc).

The Sales Approval section allows the designated manager to approve custom pricing. This manager will receive an email informing them that their approval is required. See Appendix Item Five for an example of the email.

Pending Approvals

The designated approver can log in to DataTree.com directly from the email and access the Sales Approval form through the Internal Admin

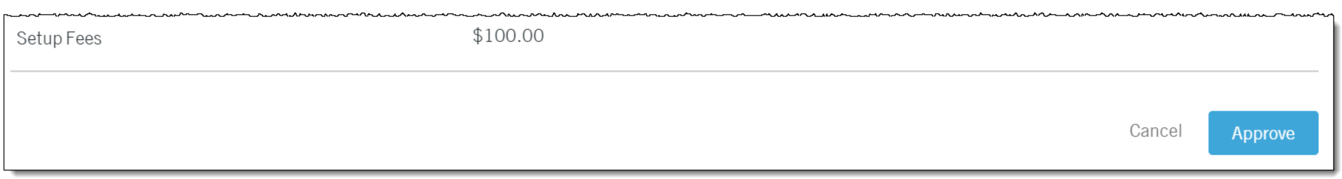


Company	Account #	Name	Status	Date	Requester	Division		
7686	2001080		New	10/17/2013	vrao	DBS	Edit	Cancel
veshwarCL	2001092		New	10/21/2013	eshwar_del_63…	DBS	Edit	Cancel
fai	2001093		New	10/21/2013	vrao	DBS	Edit	Cancel
12323	2001094		New	10/21/2013	walnut	DBS	Edit	Cancel
testcase1	2001096		New	10/21/2013	vnidhi	DBS	Edit	Cancel

After clicking Sales Approval, locate the account in question from the Pending Approvals list and click the **Edit** link.

Do not click the **Cancel** link unless you mean to delete the company.

Click **Approve** to approve the custom pricing.



Appendix One: Managed Service Products

These products require an executed hard copy master licensing agreement. ELS provisions all managed services products accessed in DataTree and require a separate account in the ELS systems. Pricing is in the MLA and is not part of the DataTree Admin Tool.

Overview:

Provisioning Managed Services products

1. SalesForce Account Setup: Create a new Account Setup Request for the customer account.
2. DataTree Admin Tool: Create a new customer account or update an existing customer account in DataTree and provision the products on the customer contract.
3. Verify that the Managed Services approval process has completed, and the products are available for your customer to order from DataTree.

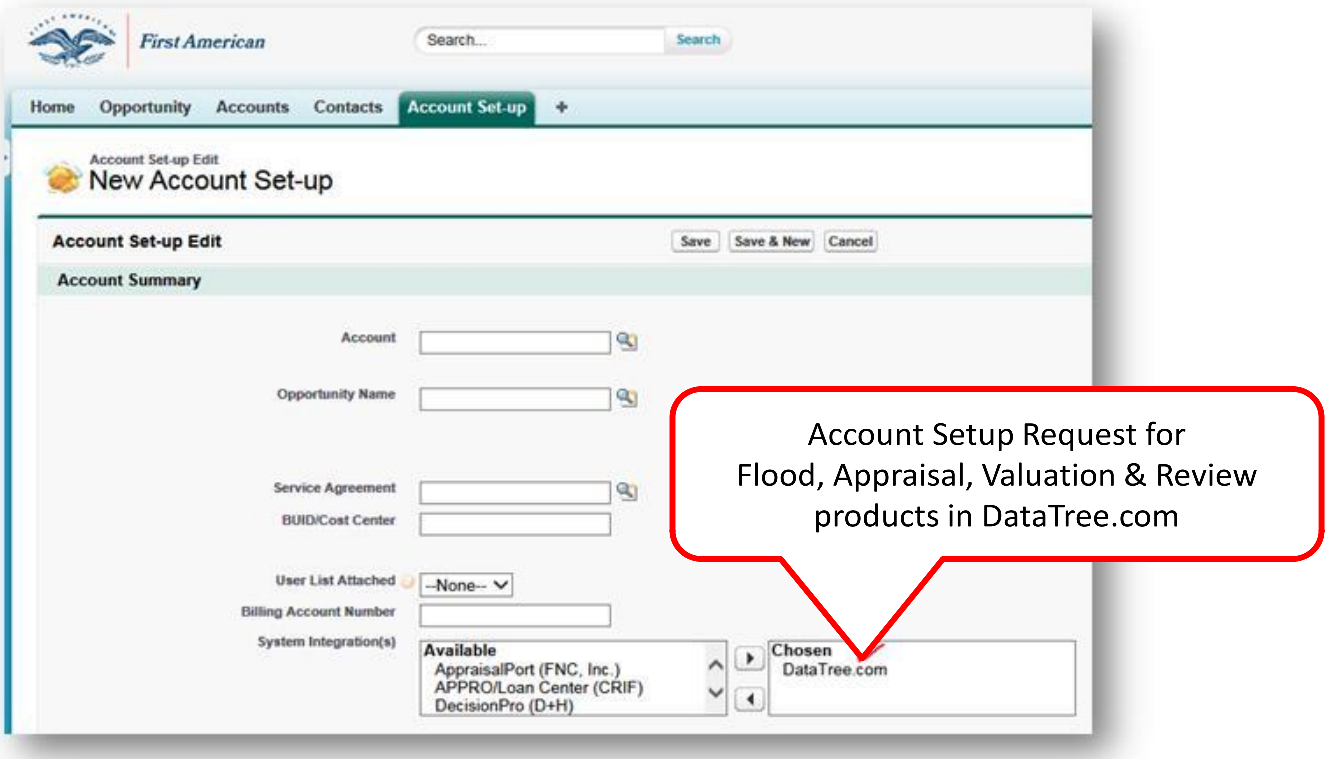
Notes:

- Managed Services products are setup in parallel to setting up the customer in DataTree. You do not have to wait to complete the Managed Services contact to provision a customer in DataTree.
- Managed Services products will appear on the DataTree menu but will not be fully available for ordering until the ELS team enters the customer's credentials in the Account Profile.
- If a customer uses the Managed Services products before ELS has completed their setup, they will receive the following message: "This product is currently in the approval and setup process. It will be available soon. Please try again later."

Step 1) SalesForce Account Setup Request

Complete an Account Setup Request for the ELS system. Make sure that you have the MLA and the Acct Setup - Non-Home Equity Client Management Summary form completed. Attach both documents to the Account Setup Request.

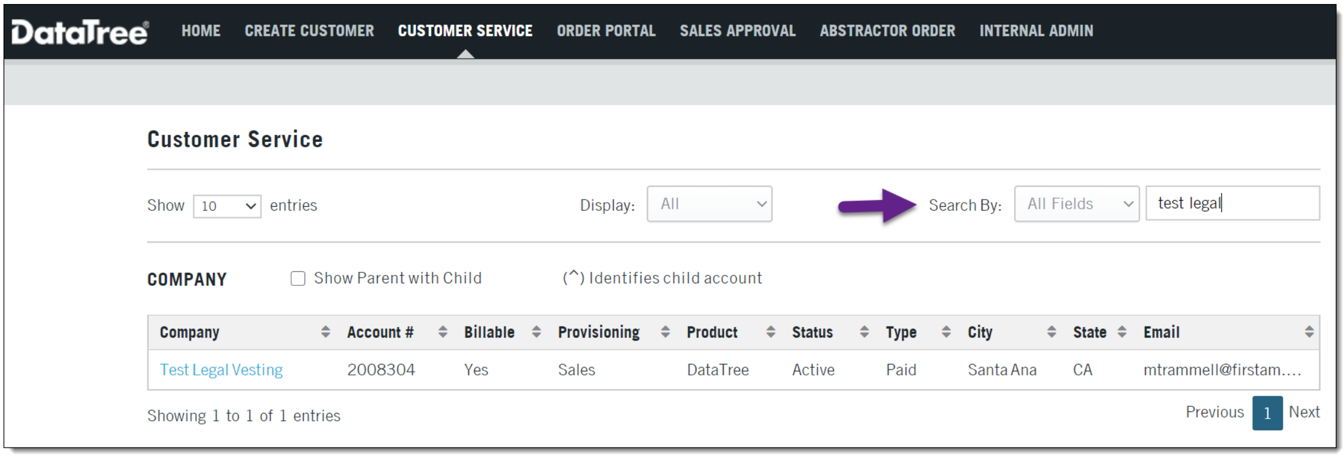
In SalesForce select the Account Set-up tab. Complete the required fields and select DataTree.com as the System Integration option.



If the customer is an existing DataTree or TItleFlex account, go to step 2 A. If they are a new customer, go to step 2 B. For new customers, follow all the provisioning steps shown above.

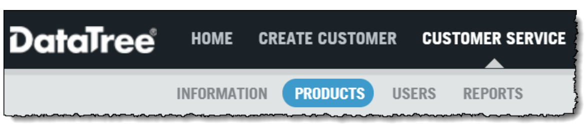
Step 2 A) <u>Existing</u> Customers

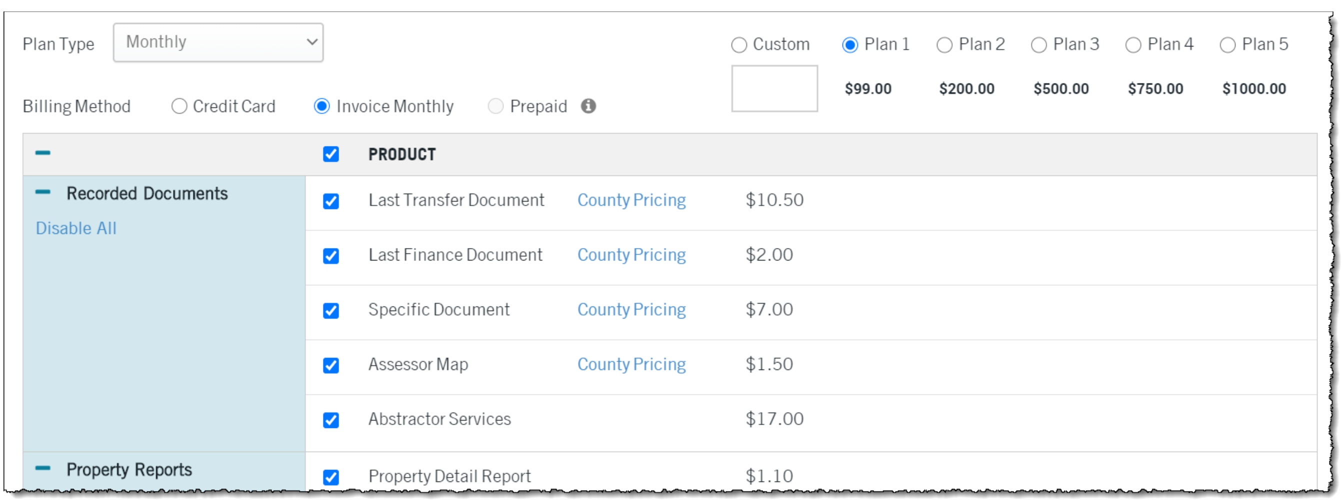
In the DataTree Admin tool, select the Customer Service option and find the account.



This page will only show the search tools until search criteria are entered. Click the company name to access editing tools.

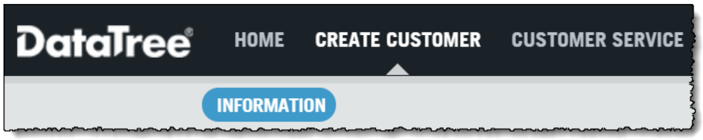
Click **Products** in the company account. Enable the reports as specified in the customer's contract. The pricing details are in the Master Licensing Agreement.

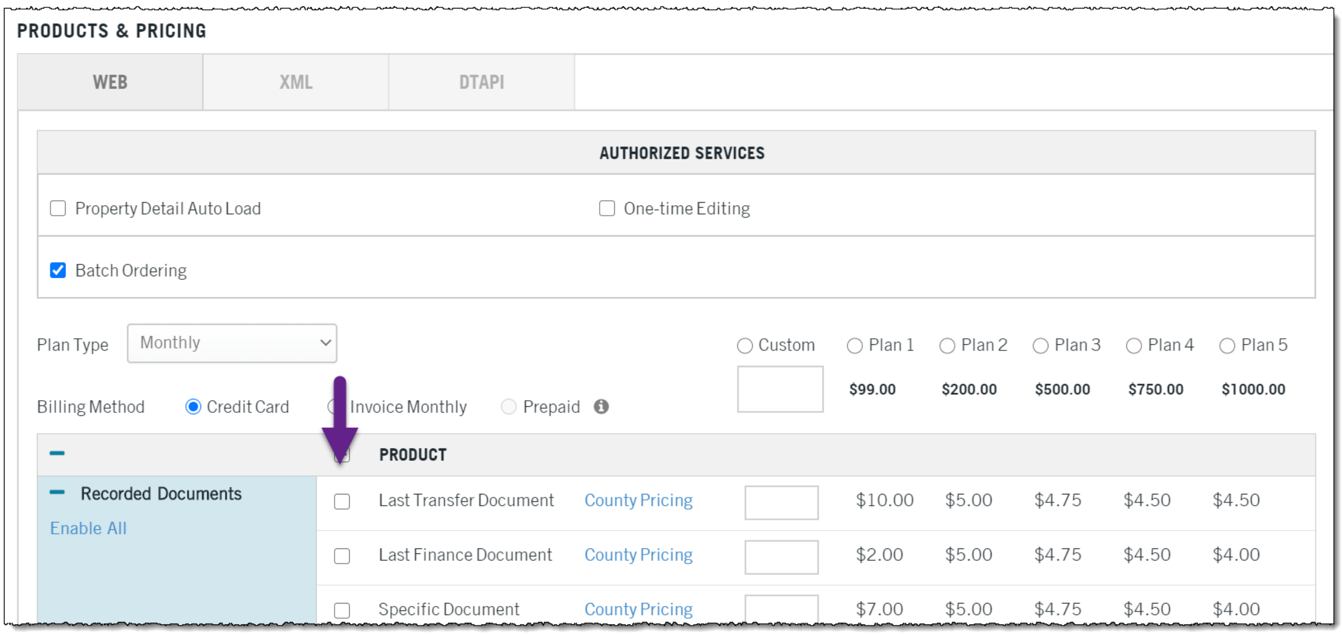




Step 2 B) New Customers:

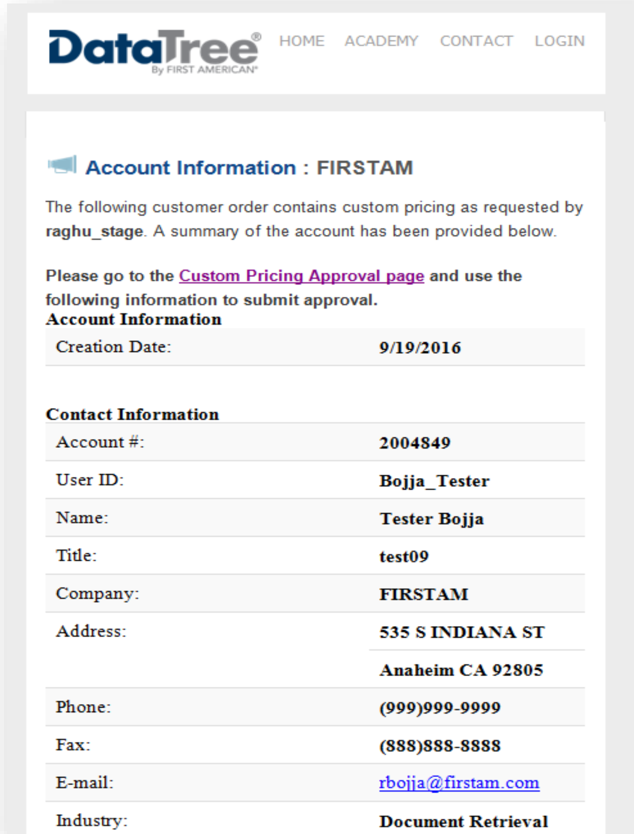
In DataTree Admin, select the Create Customer option and enter the appropriate account information. Provision all sections as required. The process is the same (click the red "x" to change it to a green "checkmark").





Step 3) Verify Managed Services Email Approval

When you enable a Managed Services product in the DataTree Admin tool, the Admin tool sends an email to ELS for product approval.



DataTree® By FIRST AMERICAN®

HOME ACADEMY CONTACT LOGIN

Account Information : FIRSTAM

The following customer order contains custom pricing as requested by **raghu_stage**. A summary of the account has been provided below.

Please go to the Custom Pricing Approval page and use the following information to submit approval.

Account Information

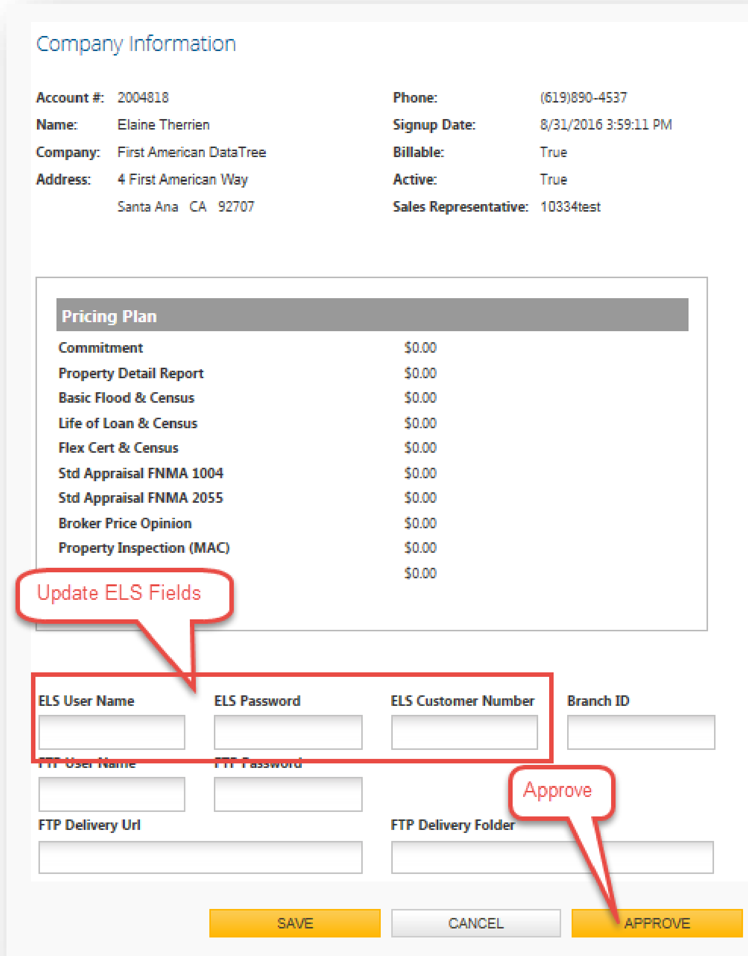
Creation Date:	**9/19/2016**

Contact Information

Account #:	**2004849**
User ID:	**Bojja_Tester**
Name:	**Tester Bojja**
Title:	**test09**
Company:	**FIRSTAM**
Address:	**535 S INDIANA ST**
	Anaheim CA 92805
Phone:	**(999)999-9999**
Fax:	**(888)888-8888**
E-mail:	rbojja@firstam.com
Industry:	**Document Retrieval**

ELS will setup:

- The account in the ELS Billing System, and,
- Enter the ELS customer account information into DataTree.com enabling access to the products.



Appendix Two: Trial Generator

Under **Create Customer** accounts can be setup as trial accounts using the **Trial** radio button.

NOTE: Managed Services products are not available for Trial Accounts.

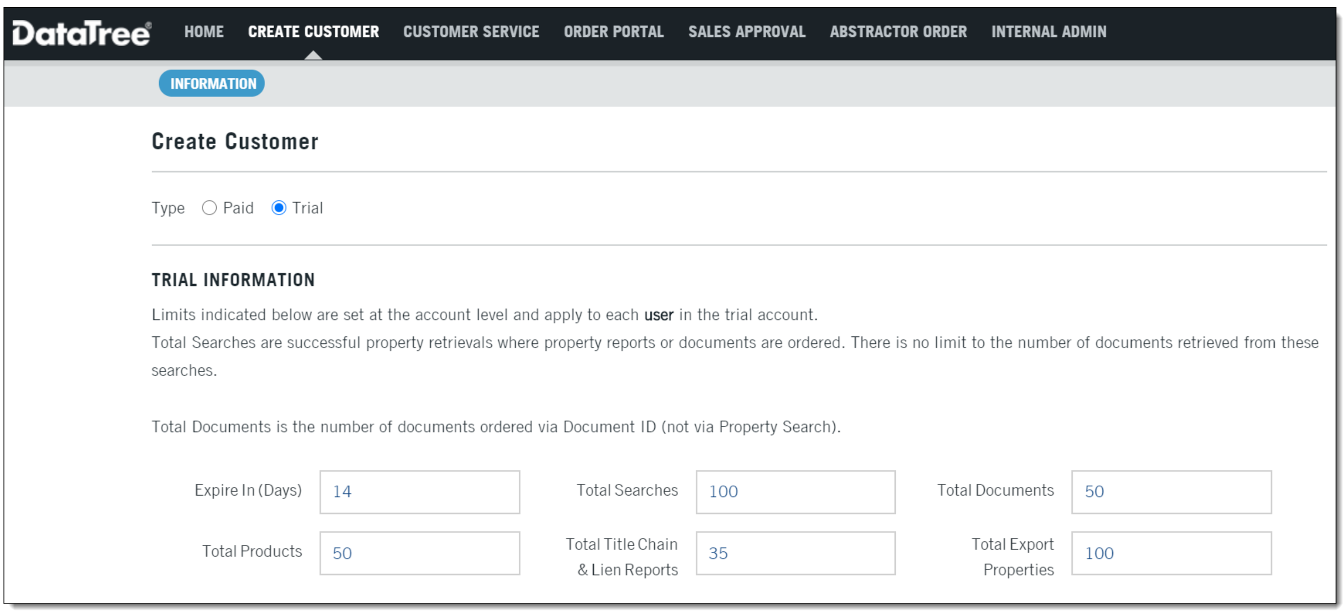
Customer Information

Enter the customer information. Once an email address is used for a trial account, it may not be re-used to create another trial.

Trial Information

Manage the number of trial duration, total searches, products, searches and total products available here. Once submitted, a trial username will be created and emailed to the client at the email provided.

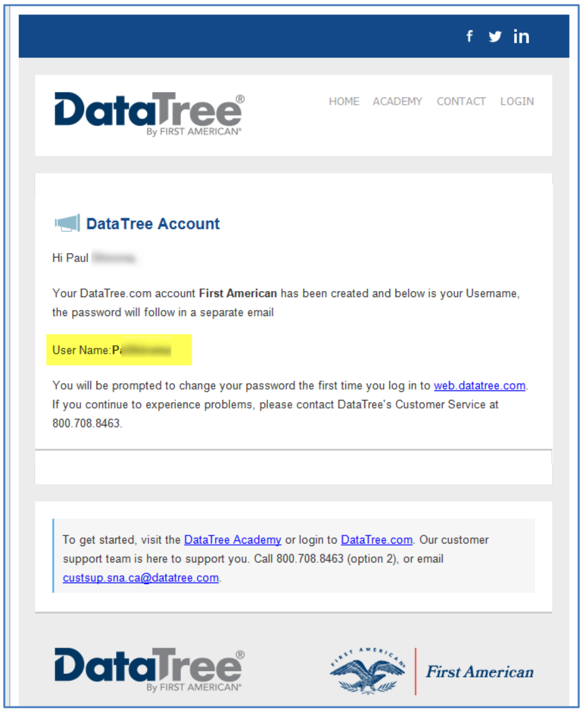
NOTE: The total number of searches is fixed and cannot be changed.



Appendix Three:

Examples One and Two: Username and Password Email Examples

Client emails with username and password. Your email address will appear in the cc line of the email with the username (at left).



HOME ACADEMY CONTACT LOGIN

DataTree Account

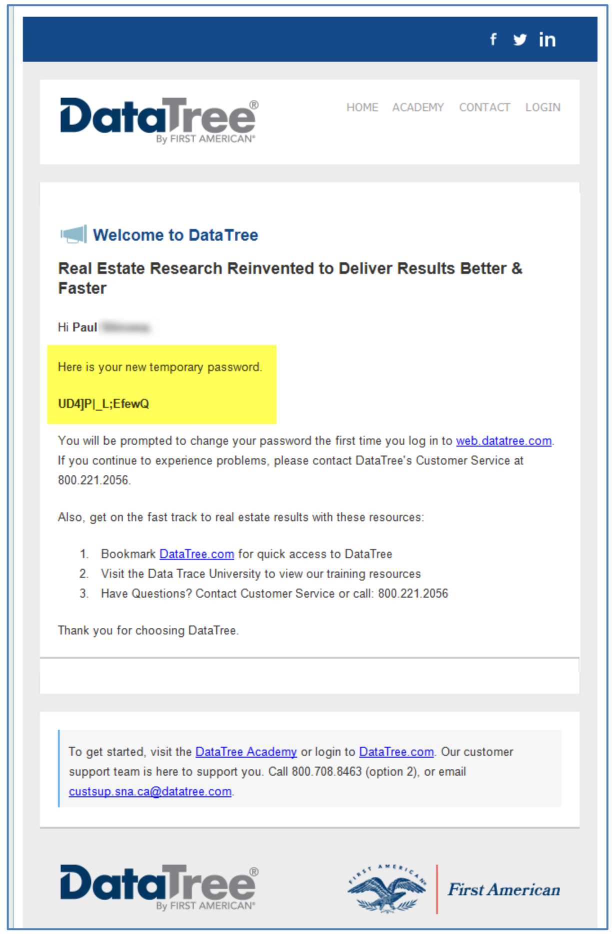
Hi Paul

Your DataTree.com account **First American** has been created and below is your Username, the password will follow in a separate email

User Name: P

You will be prompted to change your password the first time you log in to web.datatree.com. If you continue to experience problems, please contact DataTree's Customer Service at 800.708.8463.

To get started, visit the DataTree Academy or login to DataTree.com. Our customer support team is here to support you. Call 800.708.8463 (option 2), or email custsup.sna.ca@datatree.com.



HOME ACADEMY CONTACT LOGIN

Welcome to DataTree

Real Estate Research Reinvented to Deliver Results Better & Faster

Hi Paul

Here is your new temporary password.

UD4]P|_L;EfewQ

You will be prompted to change your password the first time you log in to web.datatree.com. If you continue to experience problems, please contact DataTree's Customer Service at 800.221.2056.

Also, get on the fast track to real estate results with these resources:

1. Bookmark DataTree.com for quick access to DataTree
2. Visit the Data Trace University to view our training resources
3. Have Questions? Contact Customer Service or call: 800.221.2056

Thank you for choosing DataTree.

To get started, visit the DataTree Academy or login to DataTree.com. Our customer support team is here to support you. Call 800.708.8463 (option 2), or email custsup.sna.ca@datatree.com.

Example Three: System EULA

This is a standard, boilerplate license agreement.

FIRST AMERICAN DATA TREE LICENSE AGREEMENT

This License Agreement ("Agreement") accompanies the information, data, images, reports, and/or software (the "Services") that you are accessing. By accessing the Services, you are agreeing to all the terms and conditions of this agreement, including the product, pricing and billing information in any order confirmation, if applicable ("Order Confirmation"), the terms of which are incorporated into this Agreement by reference. First American Data Tree LLC, a Delaware limited liability company ("Data Tree") grants you ("Customer") a limited, non-exclusive, non-transferable license to use the Services, provided you accept the following terms and conditions:

1. Property.
The Services and all intellectual property rights therein are owned by Data Tree. No ownership rights are granted by this Agreement and, except for the limited license provided, Data Tree reserves all rights in and to the Services and all underlying data compilations and information contained therein, including but not limited to the exclusive intellectual property rights and the right to grant further licenses. Customer acknowledges that the Services are the proprietary property of Data Tree and are a valuable commercial product, the development of which involved an expenditure of substantial time and money by Data Tree.

2. Permitted Use.
The Services are solely for use within Customer's own organization by Customer's own employees for

Example Four: Confirmation Email

From:
Sent: Thursday, April 23, 2015 1:16 PM
To:
Cc: Agreements (SNA)
Subject: DataTree.com Account Confirmation

This is a commercial message sent by First American Data Tree.

DataTree® By FIRST AMERICAN®

Share and Connect

Dear

Thank you for choosing DataTree.com from First American Data Tree! We value our customers and look forward to providing you with instant access to the nation's largest land document database. Below is a summary of your account information for your records.

Account Information

Creation Date:	**4/23/2015**
Contact Information	
Account #:	
User ID:	
Name:	
Title:	**Managing Director**
Company:	**Secure Document Research**
Address:	**917 Tahoe Blvd.** **Suite 302**
Phone:	
Fax:	
E-mail:	
Industry:	**Document Retrieval**
Billing Information	
Billing Method:	**MMC Credit Card**
Term:	**12 Months**
Card Type:	**Visa**
Card Number (Last 4 Digits):	**3471**
Card Expiration:	**04/2018**
Cardholder Name:	
Pricing Plan	
Commitment	**$500.00**
Last Transfer Document	**$4.75**
Last Finance Document	**$4.75**
Assessor Map	**$4.75**
Transaction History Search	**$4.75**
Voluntary Lien Search	**$8.50**
Involuntary Lien Search	**$17.00**
Property Ownership Search	**$25.00**
Specific Document	**$4.75**
Property Information	**$1.00**
Sales Comparables	**$3.50**
Tax Status Report	**$3.00**
Legal & Vesting w/ Transaction History	**$10.00**
Statewide Search	**$0.25**
*Abstractor Services	**$27.00**
Data Export	**$0.30**
Mailing Labels	**$0.15**
ValuePoint4	**$17.00**
PASS	**$17.00**
ValueSure	**$17.00**
Setup Fees	**$0.00**

*Abstractor Services is $27.00 per document plus any applicable abstractor fees

To get started, click here to view and download a step-by-step User Guide or click below and enter your user ID and password to begin using DataTree.com. If you have any questions or need assistance, please do not hesitate to contact a customer support representatives at 800-708-8463(option 2), or email custsup.sna.ca@datatree.com.

Sign In

Example Five: Custom Pricing Approval Email

From: [illegible]
Sent: Thursday, April 23, 2015 10:21 AM
To: [illegible]
Cc: [illegible]
Subject: DataTree.com – Request For Custom Pricing Approval

This is a commercial message sent by First American Data Tree.

DataTree® By FIRST AMERICAN®

Share and Connect

The following customer order contains custom pricing as requested by David Gomez. A summary of the account has been provided below. **Please go to the Custom Pricing Approval page and use the following information to submit approval.**

Account Summary

Creation Date:	**4/23/2015**
Contact Information	
Account #:	[illegible]
User ID:	[illegible]
Name:	[illegible]
Title:	**Owner**
Company:	**Compass Appraisals**
Address:	**30 Landing Circle**
	Suite 105
	[illegible]
Phone:	[illegible]
Fax:	
E-mail:	[illegible]
Industry:	**Appraisal**
Billing Information	
Billing Method:	**MMC Credit Card**
Pricing Plan	
Commitment	**$125.00**
Last Transfer Document	**$5.00**
Last Finance Document	**$5.00**
Assessor Map	**$0.00**
Transaction History Search	**$0.00**
Specific Document	**$5.00**
Property Information	**$0.00**
Sales Comparables	**$0.00**
Abstractor Services	**$27.00**
Data Export	**$0.25**
Setup Fees	**$0.00**

Appendix Four:

Using Billable Groups:

A few customers may need to allocate charges to specific cost centers and billable groups may assist with this need.

Step One: Identify and Flag Parent Account:

Before doing anything else:

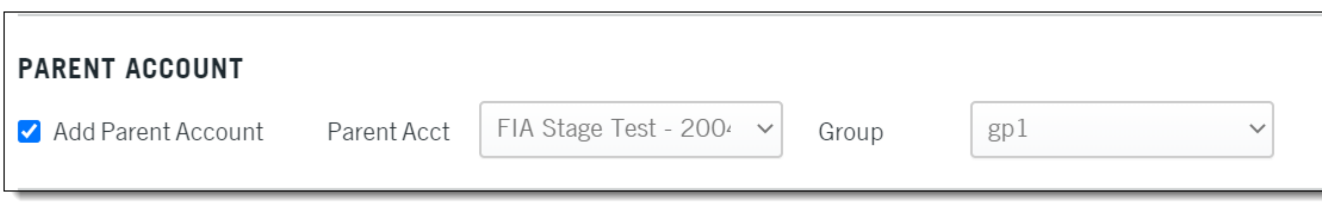
1. Make sure that you have the account the customer wants to be the parent account and get the account number.
2. If the group the customer wants to be billable already exists, make sure to get that from customer. Otherwise, have the customer build group and get the name of the group.
3. Have the customer provide the group’s billing contact information, including the name, address, phone, fax, and email.

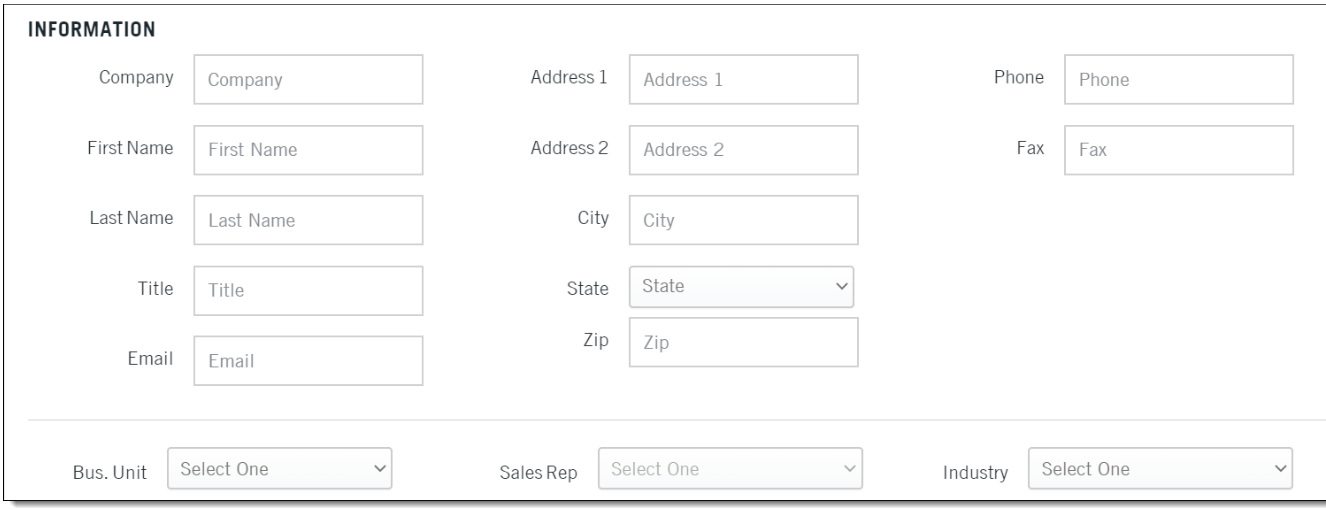
Send an email to <**<u>someone in development to make account number “xyz” a parent account></u>**

Development will flag the customer’s account to be a parent account. This allows groups below the newly christened parent to be setup as billable accounts.

Step Two: Modify the Group Provided by the Customer to Billable.

In the Internal Admin, check Add Parent Account (1) and select the parent account (2) from the list. This information is from Step 1.1, above. Select the group (3).





Complete the group billing information (4).

Make sure Company Name field the same as parent group.

Naming convention: “Name of Company dash Name of Group” (example: Bank of America – Post Closing)

Enter the billing address (which may be different from parent address).

Complete FA business information to match existing customer’s current information.

Step Three: Create Group Managers

Customer’s Company Admin makes group managers, if required, as mentioned above.

Once a Billable Group has been created, it may be viewed at any time from the Company level.

Appendix Five: TaxSource Pricing Configuration

If you enable any TaxSource option, it becomes enabled for all states. These cannot be enabled for individual states/state groups.

☐	TaxSource (Automated)	State Pricing			$3.00	$3.00	$3.00	$3.00	$3.00
☐	TaxSource	State Pricing	ℹ		$6.00	$6.00	$6.00	$6.00	$6.00
☐	TaxSource Blended	State Pricing	ℹ		$8.00	$8.00	$8.00	$8.00	$8.00

For clients configured with automated-only counties, select **Tax Source (Automated.)** For clients that include manual counties, select **both TaxSource** (**Automated**) and **TaxSource**. If a client has negotiated a SOW for a single rate for auto and manual, use the **TaxSource Blended** option.

Any time one of these options is selected, additional pricing configuration is required. All states will default to the price set in the menu above. However, there are states that do not fall under the default pricing model. Use the State Pricing link to adjust each of the states listed in the table below.

TaxSource Pricing					
TaxSource Tier 1	**Automated Rate**	**Manual Rate**	**Blended Rate***	**Search Requirements**	**Delivery Time For Manual Searches**
AK, AL, AR, AZ, CA, CO, FL, HI, IA, ID, KS, MN, MT, ND, NE, NM, NV, OH, OK, OR, SD, UT, WA, WY	$3.00	$6.00	$4.50	Single Level Collection	90% reporting of orders within 48 hours
TaxSource Tier 2					
CT, DC, DE, GA, IL, IN, LA, MD, ME, MO, MS, NC, NH, RI, SC, TN, VA, VT, WI, WV	$4.00	$8.00	$6.50	Multiple Level Collection	90% reporting of orders within 48 hours
TaxSource Tier 3					
KY, MA, MI	$6.00	$12.00	$8.50	Multiple Level Collection	90% reporting of orders within 48 hours
TaxSource Tier 4					
NJ	Not Available	$15.00	$15.00	Multiple Level Collection	90% reporting of orders within 48 hours
TaxSource Tier 5					
NY	Not Available	$25.00	$25.00	Multiple Level Collection	80% reporting of orders within 3 business days
TX	Not Available	$25.00	$25.00		90% reporting of orders within 48 hours
TaxSource Tier 6					
PA	Not Available	$55.00	$55.00	Multiple Level Collection	80% reporting of orders within 8 business days

*** Blended Rate – Minimum monthly contract required. Requires approved order volume and assessment of geographic footprint.**