



TitleFlex[™]
by Data Trace[®]

USER GUIDE

Rev. 20151228

Table of Contents

Welcome	3
Getting Started.....	3
System Requirements	3
Heading Out with TitleFlex.....	4
Choose Your Property Search Preference	6
Search and Report Features.....	10
Available Reports	11
Managing Reports and Documents	14
Filters.....	16
Managing Customers	20
Company Packages, Cover Pages and Sales Reps.....	30
Support.....	35

Welcome

TitleFlex is your single source for real estate research, farming, property profile generation and customer service—that helps you serve customers quickly and build continued loyalty. With innovative search tools and advanced technology, TitleFlex provides the tools required to deliver superior customer service.

This user guide will help you get the most out of TitleFlex’s powerful features.

Getting Started



TitleFlex is designed to get you the information you need quickly, with features that allow advanced filtering, type-ahead logic and a progressive experience that will allow you to create a custom solution for any scenario. This User Guide will provide you with some basic steps for getting started quickly.

Additional eLearning and support content can be [found here](#).

For more information, you may use the Live Chat feature within TitleFlex for immediate assistance.

System Requirements

Web Browsers

Google Chrome, Mozilla FireFox and Internet Explorer 10 are required. Here is a summary of recommended settings for your browsers. For additional information on setting up your browser, [click here](#).

Trusted Site:

Typically, it is recommended that you set DataTree as a trusted site in the browser’s internet options

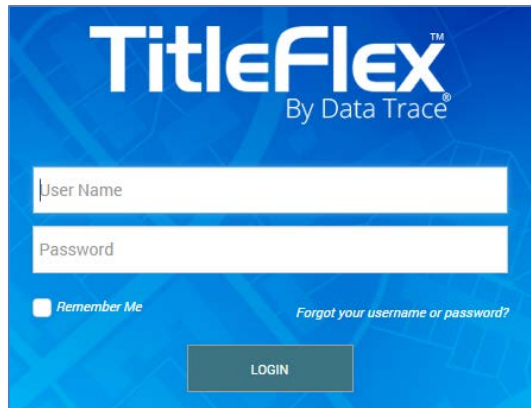
Browser Cache:

Set your browser’s cache to be deleted each time you close the browser.

Pop Up Blocking

The viewing of reports may be blocked by your browser’s settings. Be sure to disable popup blockers to gain full access to DataTree’s many features. This will be particularly important to labels, exports, printing and saving features.

Heading out with TitleFlex



Logging In

Open your web browser and go to <https://titleflex.datatree.com> and press enter. Please input your Username and Password (provided by your company administrator) and click Login.

Customer Agreement

If this is your first time logging in, you may be prompted to read and accept the Data Trace License agreement. Please read, enter your initials and hit the "I Accept" button to proceed.

For questions about this agreement, please contact Client Services at 800-708-8463.

Customer Agreement

END USER LICENSE AGREEMENT

This End User 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 containing account information received at any time ("Order Confirmation"), the terms of which are incorporated into this Agreement by reference. Data Trace Information Services LLC, a Delaware limited liability company ("Data Trace"), grants you ("Customer") a limited, non-exclusive, non-transferable license to use the Services, provided you accept the following terms and conditions:

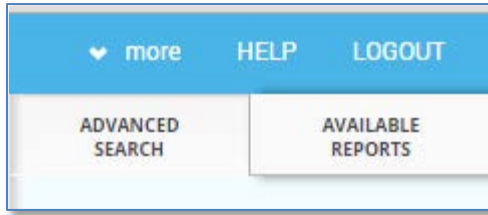
1. Property. The Services and all intellectual property rights therein are owned by Data Trace and/or its affiliates. No ownership rights are granted by this Agreement and, except for the limited license provided, Data Trace reserves all rights in and to the Services and all underlying data compilations 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 Trace and are a valuable commercial product, the development of which involved an expenditure of substantial resources by Data Trace.

2. Permitted Use. The Services are solely for use within Customer's own organization by Customer and its employees for Customer's own internal business purposes of verifying property ownership and liens. Customer shall not resell, relicense or redistribute the Services in whole or in part except as expressly permitted immediately below.

With respect to TitleFlex Services only, Customer may provide TitleFlex Services or Customer's products incorporating TitleFlex Services, to real estate agents, real estate brokers, escrow companies, lenders, title companies, and title agents solely for creating property marketing collateral for buyers of real property or for internal business purposes of conducting research regarding property.

Logging Out

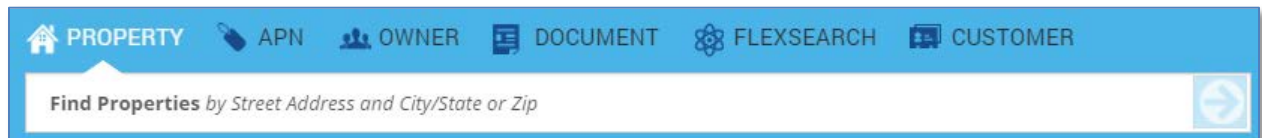
When you are finished using TitleFlex, please click on the Power button, located on the bottom left of the application to log out.



Choose Your Property Search Preference

Property Search

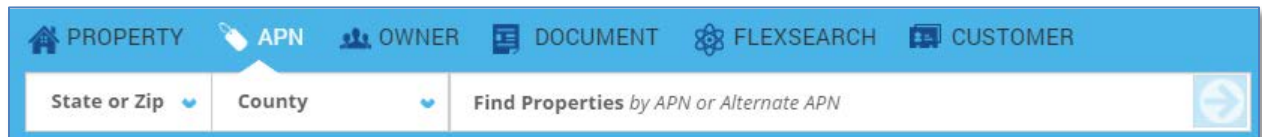
Enter any address when choosing the Property search bar. A street number, street name, city, State and zip can be used without commas. The type-ahead feature can pre-fill matched results as you type. Select the suggested property address and click on the encircled arrow to view the result. *By default, TitleFlex searches nationwide so there's no need to select a state and county!*



The screenshot shows a blue navigation bar with icons and labels for PROPERTY, APN, OWNER, DOCUMENT, FLEXSEARCH, and CUSTOMER. The 'PROPERTY' icon is highlighted with a white triangle. Below the navigation bar is a search bar with the text 'Find Properties by Street Address and City/State or Zip' and a blue arrow icon on the right.

APN Search

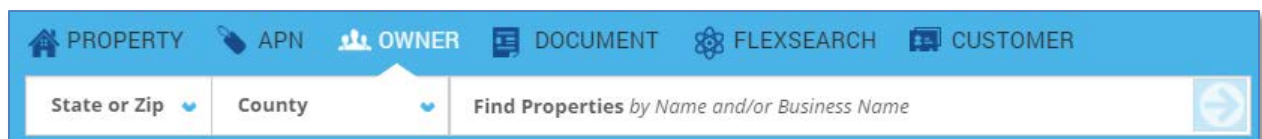
The State or ZIP and County must be provided while inputting an Assessor's Parcel Number (APN). The APN can be entered with or without dashes. Click on the encircled arrow to view the result.



The screenshot shows the same blue navigation bar as above, but the 'APN' icon is highlighted with a white triangle. The search bar contains two dropdown menus labeled 'State or Zip' and 'County', followed by the text 'Find Properties by APN or Alternate APN' and a blue arrow icon on the right.

Owner Search

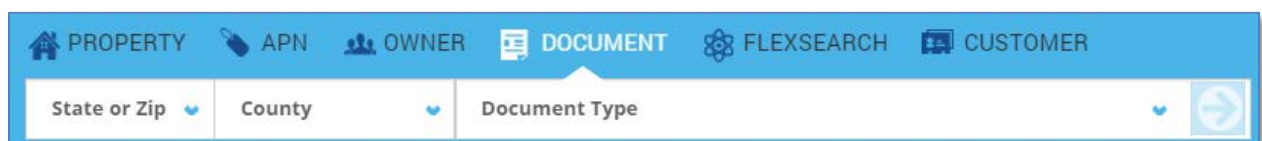
Users can query a property by either Owner's Name or Business Name. The State or ZIP and County must be provided in this search. A pop-up of the Search Result and Subject Property will be displayed along with options for Property Reports.



The screenshot shows the same blue navigation bar as above, but the 'OWNER' icon is highlighted with a white triangle. The search bar contains two dropdown menus labeled 'State or Zip' and 'County', followed by the text 'Find Properties by Name and/or Business Name' and a blue arrow icon on the right.

Document Search

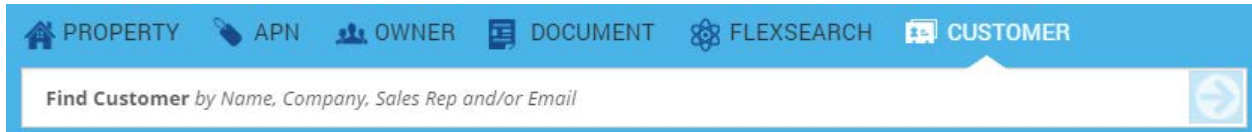
Users can query for a specific document by inputting the State, County and Document Type in the search bar. The appropriate Document Type format will then appear, allowing the user to request a recorded Instrument document.



The screenshot shows the same blue navigation bar as above, but the 'DOCUMENT' icon is highlighted with a white triangle. The search bar contains two dropdown menus labeled 'State or Zip' and 'County', followed by a dropdown menu labeled 'Document Type' and a blue arrow icon on the right.

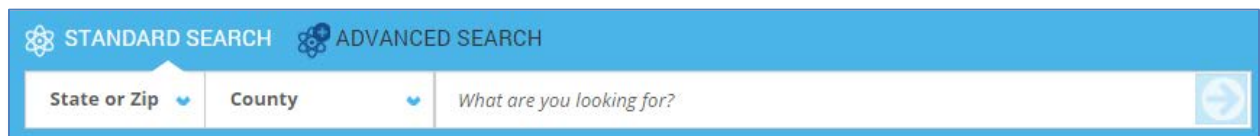
Customer

If Contact Management is enabled on your account, you will see the Customer search option. The Customer search allows you to search for your customers that have been added to the customer management tool in TitleFlex. Using the customer management tool, you can add contact information and create, generate, and save property report packages, farming lists, and individual reports on behalf of your customers. *See the Managing Customers section for more information.*



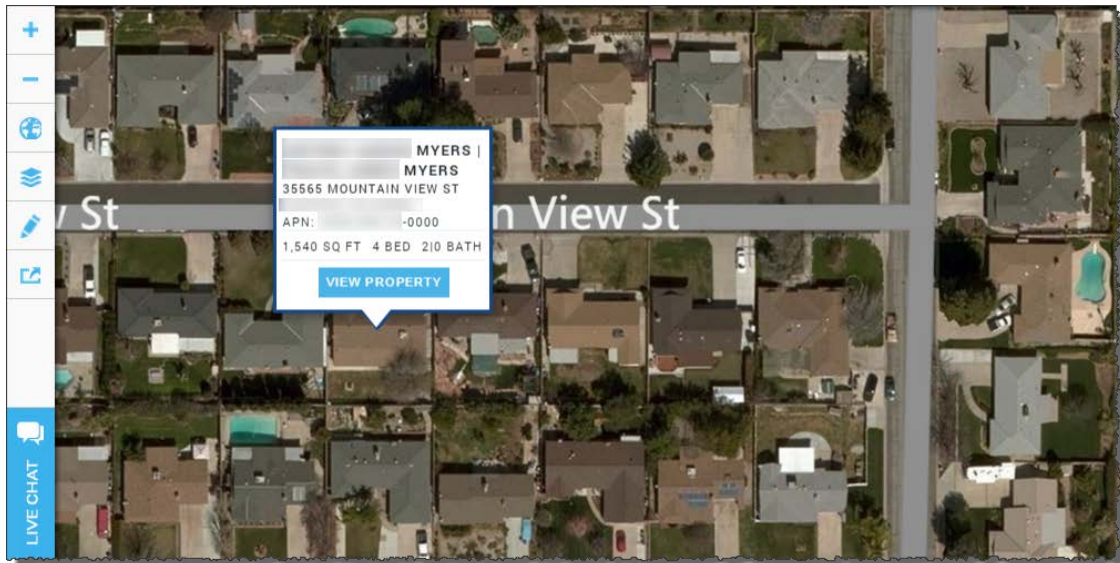
Flex Search

This is a unique search technology that connects users to information found in billions of recorded land documents, leveraging an open contextual search that is not limited by address, county, state, ZIP code, owner names or APN search fields. Simply enter a search word or phrase and FlexSearch will instantly access recorded document images going back to the year 2000. FlexSearch allows quick document searches with filters that include: full document text, county name, State name, Document Type and Document Year.



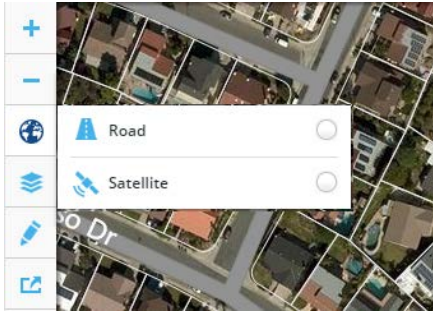
Interactive Map Search

Users can identify, select and de-select properties directly on the map simply by double-clicking on the property or by clicking View Property in the property information pop-out.

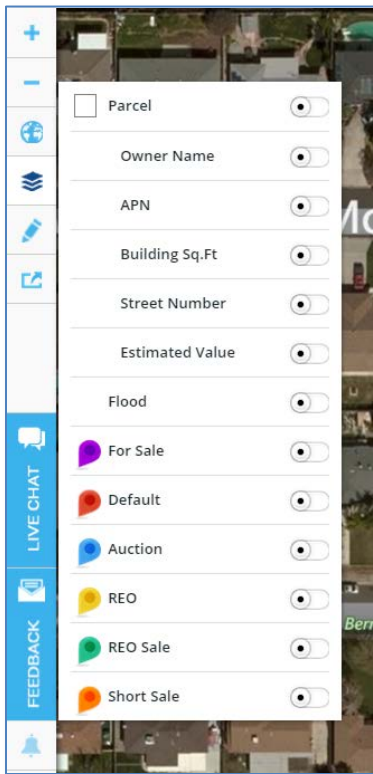


Multiple properties can be selected at once by using the Drawing Tools to define an area on the map. Any property that is touched by or falls within the area defined by your drawing tool will be selected. This is a primary method for building farms in TitleFlex. Mailing labels, export files or multi-property reports can be generated from this list.





The map view can also be changed to roads or satellite views.



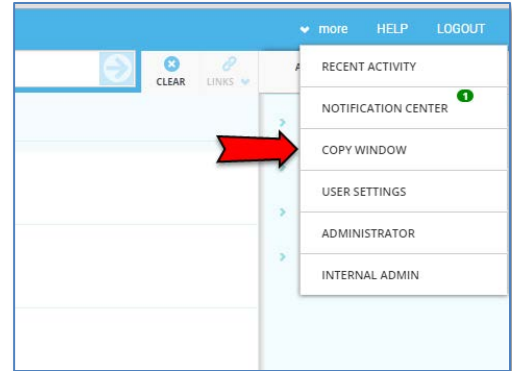
The map also includes flags and layers to provide additional information, such as distressed status, parcel boundaries, APNs and much, much more. Click on the toggle switch to the right of each option to activate that feature on the map.

For more information on using the map tools, [click here](#).

Search and Report Features

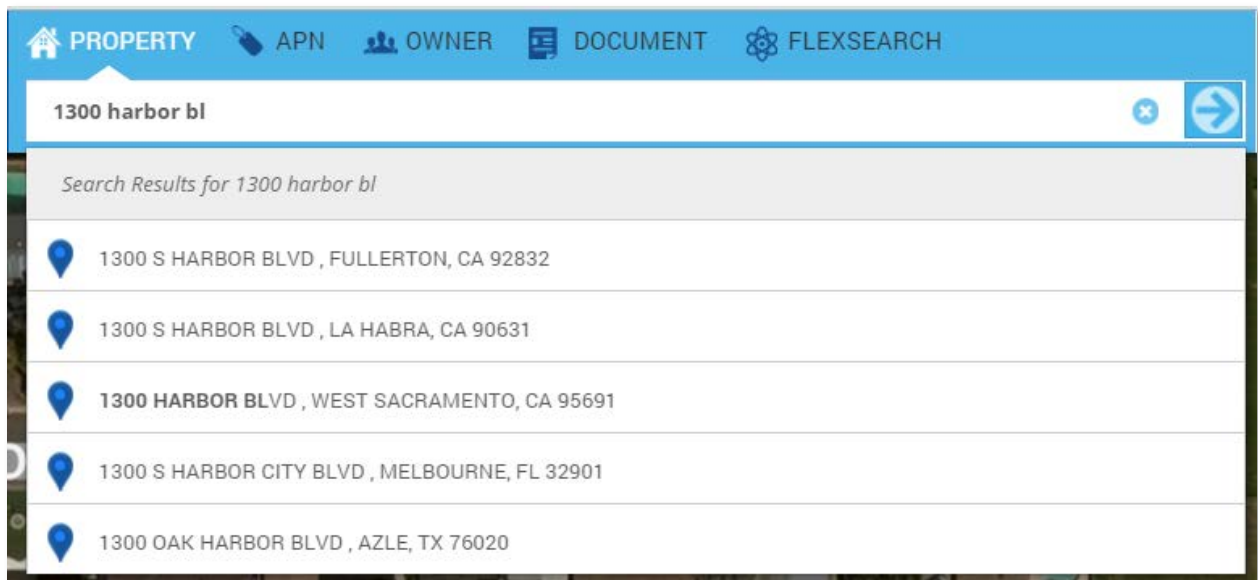
Copy Window

This allows users to conduct an unlimited number of property searches in parallel without having to complete or exit searches that have been previously started by opening additional tabs in your browser and allowing you to run multiple simultaneous independent searches.



Type-Ahead

This feature will attempt to suggest the property, APN or owner name as you enter information into the search bar. *Remember that TitleFlex searches nationwide, by default.*



Verified Records

In the reports, you may see a Verified Records icon. This indicates that a transaction was digitally checked across multiple independent resources and, when a match is found from at least two independent sources, it is marked with a "Verified" icon. This will save customers time and money by minimizing their own independent verification processes.



Available Reports

The following Property Reports are typically available for a user. If you do not see a report listed below, please contact your company administrator. Reports and documents are found at the right hand side of the application and can be ordered after a property has been selected. The reports are grouped into categories – Property, Document Images, and Valuation Reports – and the section and can be opened by clicking on the group header.

For additional information on the various reports and how to use them, [click here](#).



PROPERTY REPORTS



Property Detail Report

This report provides comprehensive information on the subject property with location information (legal description), last market sale, prior sale, property characteristics, site and basic tax information. Documents can be accessed through the report.

Tax Status Report

This report provides payment status of a parcel's current-year real estate tax obligations and prior year delinquencies. It will also include status, frequency, type, due dates, Assessor's Parcel Number (APN), Situs and mailing addresses.

Sales Comparables

This report provides a quick view into current market conditions that include sale prices, property characteristics and land use, comparing up to 50 similar properties.

Title Chain and Lien Report

Choose this report when you need property details including open deeds of trust & mortgages, involuntary liens, assessment and tax info such as current year, status and delinquencies. Documents can be accessed through the report.

Foreclosure

Choose this report to discover the information on properties in all stages of foreclosure and those subject to pending legal action.

Transaction History Basic

Select this report for comprehensive transaction history details including all ownership transfers such as quit claims and market sales, plus any mortgages.. Documents can be accessed through the report.

Transaction History Full

This expands the Basic version providing details on ownership transfers such as quitclaims, market sales, mortgages, releases, assignments and foreclosure information. Document access will be available within this report.

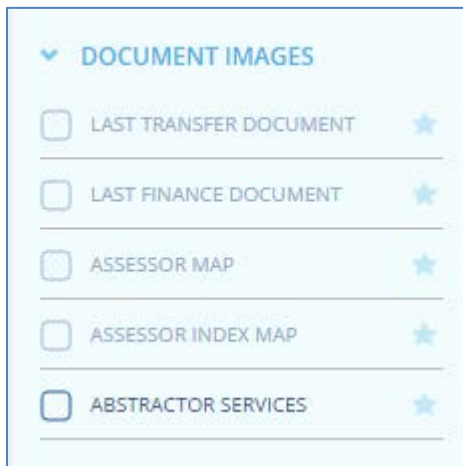
Legal and Vesting

Use the legal and vesting report when you are looking for insight on an abbreviated legal description, APN, current owner vesting and supporting tax information.

Neighbors Report

Choose this report when you need to identify the neighbors of a property, including addresses, owner names, property characteristics, land use and last sale information.

DOCUMENT IMAGES



Last Transfer Document

Access the document image for the last transfer recorded

Last Finance Document

Access the document image for the last finance recorded.

Assessor Map

View the assessor parcel maps that reflect the legal boundaries and dimensions of each parcel and serve as the basis for land value assessments

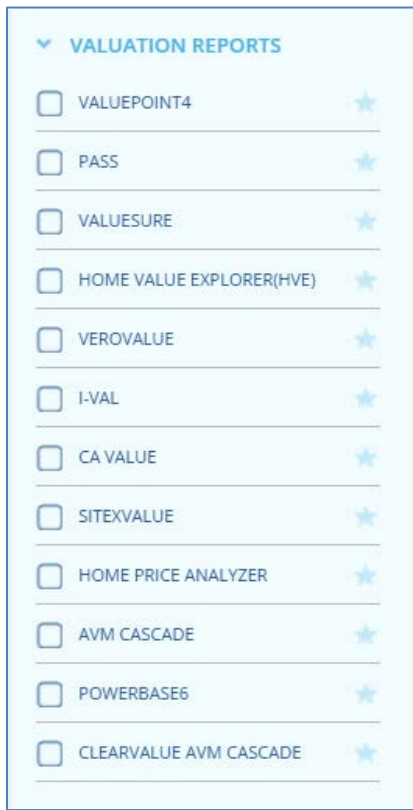
Assessor Index Map

View the assessor index map to see a high-level view of an area consisting of multiple contiguous assessor parcel maps

Abstractor Services

The Abstractor Service function is always available, regardless of whether a property is selected, and allows you to order documents through the service at any time. Completed orders will be found in the Recent Activities option in the More menu.

VALUATION REPORTS



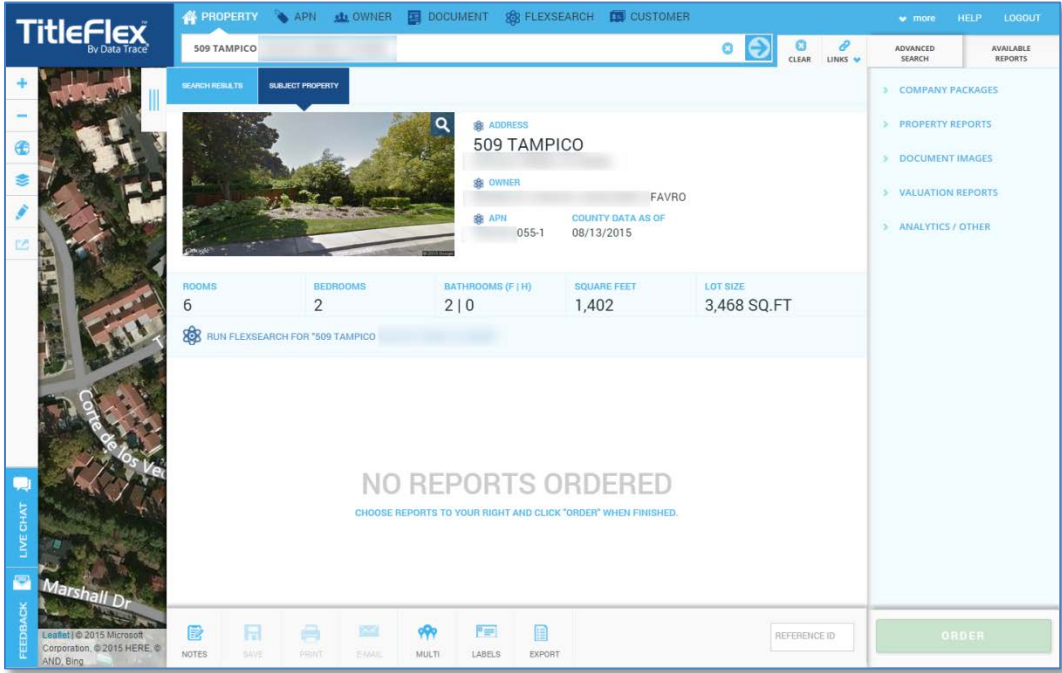
Automated Valuation Models (AVMs)

Use an AVM when you need to estimate the market value of a property. These reports typically include an estimated value, estimated valuation range, date of valuation, a confidence score, last market sale information and prior market sale information along with a list of recent market sales.

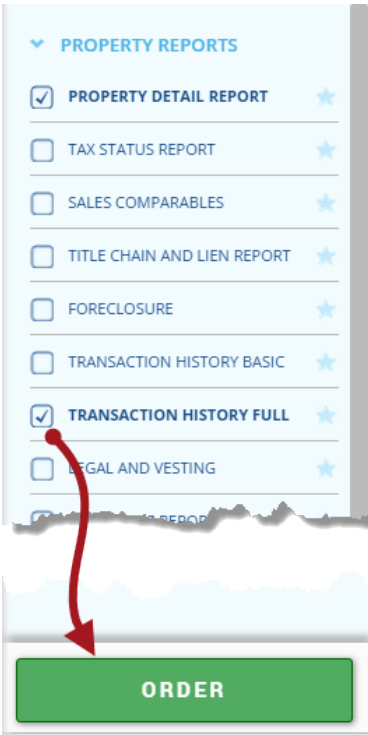
Please reference your business requirements when using AVMs as your company may specify which AVM is to be used.

Managing Reports and Documents

Once a property is selected using Property, APN, or Owner search, TitleFlex will load the Subject Property Tab containing a summary of the property. A property must be selected before a report can be ordered.



For more information on using the Search Features, [click here](#).



Ordering Reports and Documents

After locating a property, select the desired report by clicking the checkbox and clicking Order at the bottom right hand corner of the application.

For additional information on standard searches and ordering reports, click [here](#). Report-specific information can also be found [here](#).

Reports will load to the right of the subject property tab. Click on the report tab to view that particular report.



SEARCH RESULTS SUBJECT PROPERTY **PROPERTY DETAIL** TRAN HIST FULL

ADDRESS
509 TAMPICO

OWNER
DANIELLE S DRAGO | MARJORIE C FAVRO

APN
055-1

PROPERTY DETAIL REPORT ✎

SUBJECT PROPERTY

OWNER NAME DRAGO **VESTING**

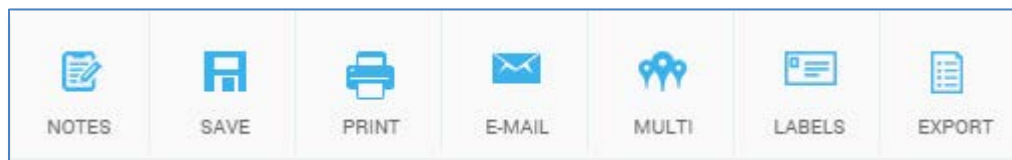
MAIL ADDRESS 509 TAMPICO

Notes, Saving, Printing and Emailing Reports

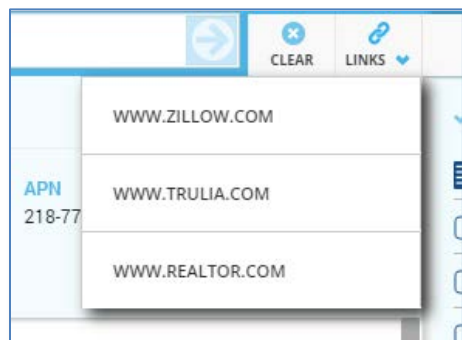
The Subject Property and selected reports and documents can be notated, saved, printed, or emailed using the toolbar just above the Subject Property.

Exporting Records

If you have selected a list of properties using the drawing tools or advanced filters (see below), you can generate a multi-property report, print mailing labels, or simply export the list into Excel. Best practices on using exports can be found [here](#).



NOTES SAVE PRINT E-MAIL MULTI LABELS EXPORT



CLEAR LINKS

WWW.ZILLOW.COM

APN 218-77 WWW.TRULIA.COM

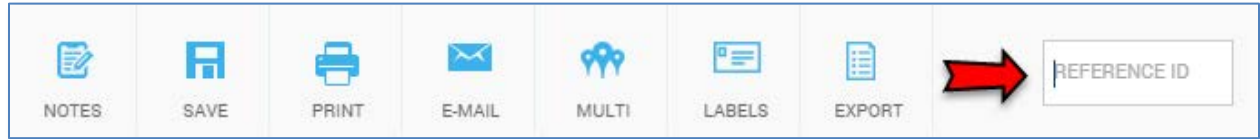
WWW.REALTOR.COM

Links

You can also search Zillow, Trulia, and Realtor.com to see if the property you selected is currently listed for sale. Selecting one of these links will launch the real estate site and search for the subject property. The site will load in a separate browser tab so you do not lose your work in TitleFlex.

Reference ID Field

The Reference ID is a free-text field allowing the user to enter an identifier so you can find the ordered reports for this subject property on the monthly TitleFlex invoice. This will allow you to identify reports on the monthly TitleFlex invoice so you can bill out work to a specific client, if required.



Filters

Use the Filters to create highly customized lists of properties for farming lists and mailing labels.

Before using the Filters, keep in mind two primary search criteria:

- **WHERE** are you searching?
- **WHAT** are you searching for?

Keeping these two questions in mind will allow you to navigate through the Filter tabs with relative ease.

Location

The Location tab describes **WHERE** you want to search for properties. It includes filters for states, counties, cities, ZIP codes, tracts and much more. You can also setup a proximity search to locate properties near a specific address.

The screenshot shows a 'FILTERS' interface with a 'LOCATION' tab selected. The interface includes several input fields for search criteria: STATE, COUNTY, SUBDIVISION (with a '+ ADD SUBDIVISION' button), STREET NUMBER, PRE DIR, STREET NAME, STREET TYPE, POST DIR, UNIT NUMBER, CITY, ZIP CODE, TRACT, NEIGHBORHOOD, APN, TAX AREA, LEGAL BOOK, and PAGE. At the bottom, there is a 'PROXIMITY SEARCH' section with fields for NUMBER OF PROPERTIES, REFERENCE ADDRESS, and MAX DISTANCE.

The following tabs describe **WHAT** you are looking for.

Characteristics

The Characteristics tab allow you to identify specific property characteristics, such as the land use, square footage, number of bedrooms, bathrooms, or total rooms, year build, presence of a pool and more.

▼ FILTERS [SHOW / HIDE]	LOCATION	CHARACTERISTICS	TRANSACTION	DISTRESSED	OWNER
LAND USE <input type="text"/>	BUILDING AREA (SQFT) <input type="text"/> - <input type="text"/>	YEAR BUILT <input type="text"/> - <input type="text"/>			
TOTAL NUMBER OF BEDROOMS <input type="text"/> - <input type="text"/>	TOTAL NUMBER OF BATHROOMS <input type="text"/> - <input type="text"/>	TOTAL NUMBER OF ROOMS <input type="text"/> - <input type="text"/>			
POOL OPTION <input type="text"/>	NUMBER OF GARAGE SPACES <input type="text"/> - <input type="text"/>	NUMBER OF STORIES <input type="text"/> - <input type="text"/>			
NUMBER UNITS <input type="text"/> - <input type="text"/>	LOT AREA (SQFT) <input type="text"/> - <input type="text"/>	LOT ACREAGE <input type="text"/> - <input type="text"/>			
ZONING CODE <input type="text"/> - <input type="text"/>	COUNTY LAND USE <input type="text"/>	SITE INFLUENCE <input type="text"/>			
ASSESSOR'S VALUE TYPE <input type="text"/>	TOTAL VALUE <input type="text"/> - <input type="text"/>	ESTIMATED CURRENT VALUE <input type="text"/> - <input type="text"/>			
	LAND VALUE <input type="text"/> - <input type="text"/>	EQUITY VALUE <input type="text"/> - <input type="text"/>			
	IMPROVEMENT VALUE <input type="text"/> - <input type="text"/>	EQUITY PERCENTAGE <input type="text"/> - <input type="text"/>			
	IMPROVEMENT % <input type="text"/> - <input type="text"/>				

Transaction

The Transaction tab includes filters for Sales, Mortgage and Listing information.

▼ FILTERS [SHOW / HIDE] LOCATION CHARACTERISTICS **TRANSACTION** DISTRESSED OWNER

SALES INFORMATION

SALE PRICE: - SALE PRICE TYPE: SELLER NAME: +

LAST SALE DATE: LAST SALE RECORDING DATE: RECORDING MONTH:

TRANSACTION TYPE: DEED TYPE:

MORTGAGE INFORMATION

MOST RECENT MORTGAGE AMOUNT: - FIRST MTG TYPE: INT RATE TYPE: INTEREST RATE: -

MOST RECENT MTG RECORDING DATE:

MOST RECENT LENDER NAME: + ADD LENDERS (This filter references a lender of record)

LISTING INFORMATION

LISTING STATUS: LISTING DATE: LISTING PRICE: -

Distressed

Investors, looking for distressed properties, will find this tab useful as it will filter for properties in different stages of the foreclosure process.

▼ FILTERS [SHOW / HIDE] LOCATION CHARACTERISTICS TRANSACTION **DISTRESSED** OWNER

FORECLOSURE STATUS:

DATE: AMOUNT: -

Owner

Finally, the Owner tab allows filtering by name, mailing address, Do Not Mail flag, occupancy and more.

The screenshot shows a 'FILTERS' panel with a dropdown menu for 'SHOW / HIDE' and a navigation bar with tabs: 'LOCATION', 'CHARACTERISTICS', 'TRANSACTION', 'DISTRESSED', and 'OWNER' (which is highlighted in green). The filter fields are organized as follows:

- OWNER LAST NAME:** Text input with a '+' icon.
- OWNER FIRST NAME:** Text input with a '+' icon.
- OWNER (OTHER):** Text input with a '+' icon.
- OWNER ETHNICITY:** Dropdown menu.
- OWNER OCCUPIED:** Dropdown menu.
- EXEMPTION:** Dropdown menu.
- MAILING STATE:** Dropdown menu.
- MAILING COUNTY:** Dropdown menu with a '+' icon.
- MAILING STREET NUMBER:** Text input.
- PRE DIR:** Dropdown menu.
- MAILING STREET NAME:** Text input.
- STREET TYPE:** Dropdown menu.
- POST DIR:** Dropdown menu.
- UNIT NUMBER:** Text input.
- MAILING CITY:** Text input with a '+' icon.
- MAILING ZIP:** Text input with a '+' icon.
- DO NOT MAIL:** Dropdown menu.

For more information on creating farms using the filters and the interactive map, [click here](#).

Managing Customers

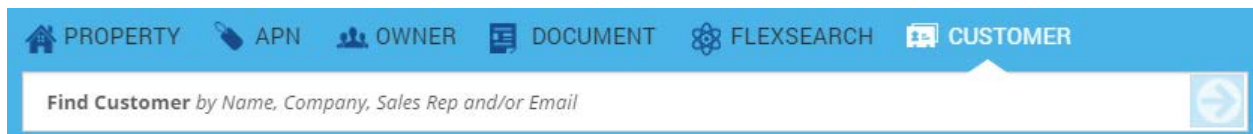
TitleFlex comes with customer relationship management functionality.

Additional information on using the customer management tool can be found [here](#).

Customer

The customer management tool in TitleFlex provides contact management and customer support capabilities. You can add client contact information, create, generate, and save report package templates, farming lists, and generate property reports on behalf of your customers.

You can enter new contact information for a client, edit or update their information, packages and farms that you have created for your clients through this tool.



Click the Customer link in the Search bar to search for an existing customer.

Adding a New Customer



Clicking the New Customer button will open a blank customer contact card. Complete as much information as available, and click Create Customer. A customer record can be created with minimal information. The record can always be enhanced later.

CUSTOMER INFORMATION: NEW CUSTOMER

CONTACT	PACKAGES	FARMS
----------------	-----------------	--------------

FIRST NAME

LAST NAME

COMPANY

OFFICE PHONE

MOBILE PHONE

EMAIL

ADDRESS

CITY

STATE

ZIP

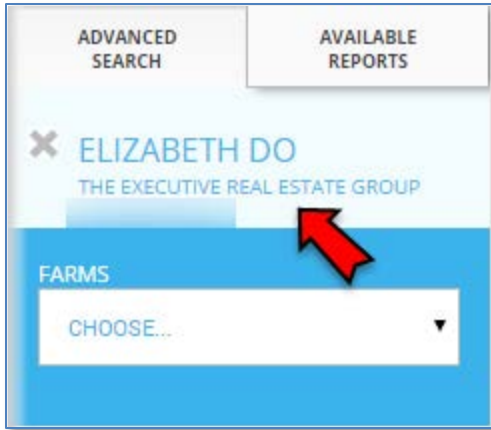
CUSTOMER ACCOUNT #

SALES REP

NOTES

INTERACTIONS

ORDER HISTORY

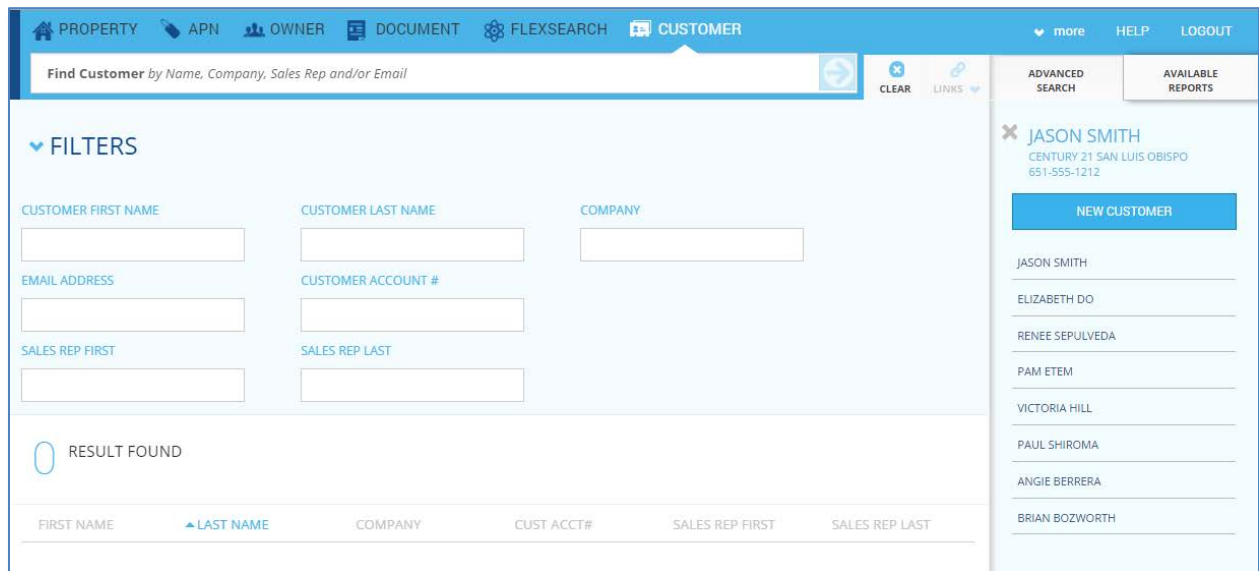


Your new customer will appear at the top of the right hand pane under the Advanced Search button. Note: All searches, reports generated, mailing labels created, packages printed, etc. will now be saved under this Customer. Click the large X when you stop serving this customer.

Selecting a Different Customer

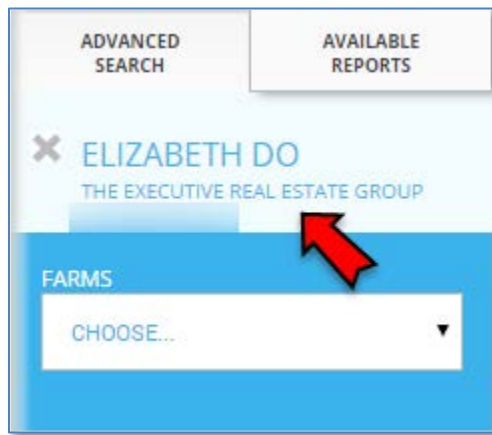
If you need to switch customers, click the Customer link on the search bar. A list of recently accessed customer contact cards will be listed in the Advanced Search panel at right. If you do not see the customer immediately, you can use the filter to search for their card.

Click on the customer name to select and access that customer's contact card.



Editing an Existing Customer

You can edit the information for an existing customer by clicking on their name, as shown here.



This will open the customer contact card and you can edit the information, as required. Click Save at the lower right when you are finished. Note that you can also Print and Delete a customer from here.

CUSTOMER INFORMATION: Elizabeth

CONTACT PACKAGES FARMS

FIRST NAME: Elizabeth LAST NAME: [Redacted]

COMPANY: [Redacted]

OFFICE PHONE: 823-9253 MOBILE PHONE: 555-4567

EMAIL: Liz@[Redacted]

ADDRESS: 1123 AnyStreet

CITY: AnyCity STATE: CA ZIP: 92707

CUSTOMER ACCOUNT #: 2

SALES REP: [Redacted]

NOTES

http://[Redacted]

Part of the [Redacted] RE Networks

See Yelp reviews: [http://www.yelp.com/\[Redacted\]](http://www.yelp.com/[Redacted])

INTERACTIONS

05/29/2015 10:45AM [Redacted] Paul and Lynn supporting this customer

05/29/2015 09:46AM [Redacted] Received email, sent multi property labels

ORDER HISTORY

Date	Time	Order ID	Address
06/23/2015	03:09PM	7047975	421 Fairlawn Ave, Saint Louis, MO 63119 - Package
06/23/2015	03:09PM	7047974	421 Fairlawn Ave, Saint Louis, MO 63119 - Property D...
06/23/2015	03:08PM	7047957	810 Newport Ave, Saint Louis, MO 63119 - Neighbors ...
06/23/2015	03:08PM	7047956	810 Newport Ave, Saint Louis, MO 63119 - Package
06/09/2015	03:24PM	6834387	3043 Royce Ln, Costa Mesa, CA 92626 - Package

DELETE PRINT CANCEL SAVE

Creating Farms

Farms can be created using either the interactive map or the advanced filters. Farms are unique for each customer. For specific information and examples, please [click here](#) for the eLearning module. After setting up your search parameters as required by your customer, click the Save Farm button at the lower right hand corner of the Filter panel.

The screenshot shows the TitleFlex search interface. At the top, there's a navigation bar with 'PROPERTY', 'APN', 'OWNER', 'DOCUMENT', 'FLEXSEARCH', and 'CUSTOMER'. Below this is a search bar with the text 'Find Properties by Street Address and City/State or Zip'. The main area is divided into a map on the left and a filter panel on the right. The filter panel has tabs for 'FILTERS', 'LOCATION', 'CHARACTERISTICS', 'TRANSACTION', 'DISTRESSED', and 'OWNER'. The 'FILTERS' tab is active, showing various search criteria like 'LAND USE', 'BUILDING AREA (SQFT)', 'LOT AREA (SQFT)', 'TOTAL NUMBER OF BEDROOMS', 'TOTAL NUMBER OF BATHROOMS', 'TOTAL NUMBER OF ROOMS', 'NUMBER UNITS', 'LOT ACREAGE', 'YEAR BUILT', 'POOL OPTION', 'ZONING CODE', 'COUNTY LAND USE', 'ESTIMATED CURRENT VALUE', 'ASSESSED VALUE', and 'NEW CONSTRUCTION'. A 'SEARCH' button is at the bottom of the filter panel. Below the filter panel, it says '605 RESULTS FOUND' and 'YOUR SEARCH RETURNED A LARGE NUMBER OF RESULTS. PLEASE CHOOSE ONE OF THE OPTIONS BELOW OR USE THE FILTERS TO REFINE YOUR RESULTS.' There are buttons for 'ORDER LABELS', 'EXPORT LIST', and 'VIEW ALL RESULTS'. A red arrow points to a 'SAVE FARM' button. On the right side, there's a sidebar with 'ELIZABETH DO' and '605 RESULTS FOUND (5) FILTERS APPLIED'. The sidebar also shows 'LOCATION' filters for 'STATE' (California), 'COUNTY' (Contra Costa), and 'CHARACTERISTICS' filters for 'LAND USE', 'LOT AREA (SQFT)', 'TOTAL NUMBER OF BEDROOMS', and 'TOTAL NUMBER OF BATHROOMS'. At the bottom, there are icons for 'NOTES', 'SAVE', 'PRINT', 'E-MAIL', 'MULTI', 'LABELS', and 'EXPORT'.

The screenshot shows a dropdown menu titled 'FARMS'. The menu is open, showing a list of farm names. The first two items are 'CHOOSE...' and the rest are: '92646 Large Lots', 'Adams and Brookhurst', 'Adams and Placentia List', 'High Value Properties 92646', 'Temp Farm for Demo', and 'Zip Code 94598 by SFR old homes'.

New farms will be added to the Farms list immediately below the customer's name. Farms are unique to each customer and can be re-run at any time by simply selecting them from the list. If you do not see the farms you expect, make sure you have the right customer selected.

If a customer indicates that they no longer require a particular farm, you can delete it from the Farms list by accessing the customer contact card, clicking the Farms tab and clicking the Delete button to the right of the unnecessary farm.

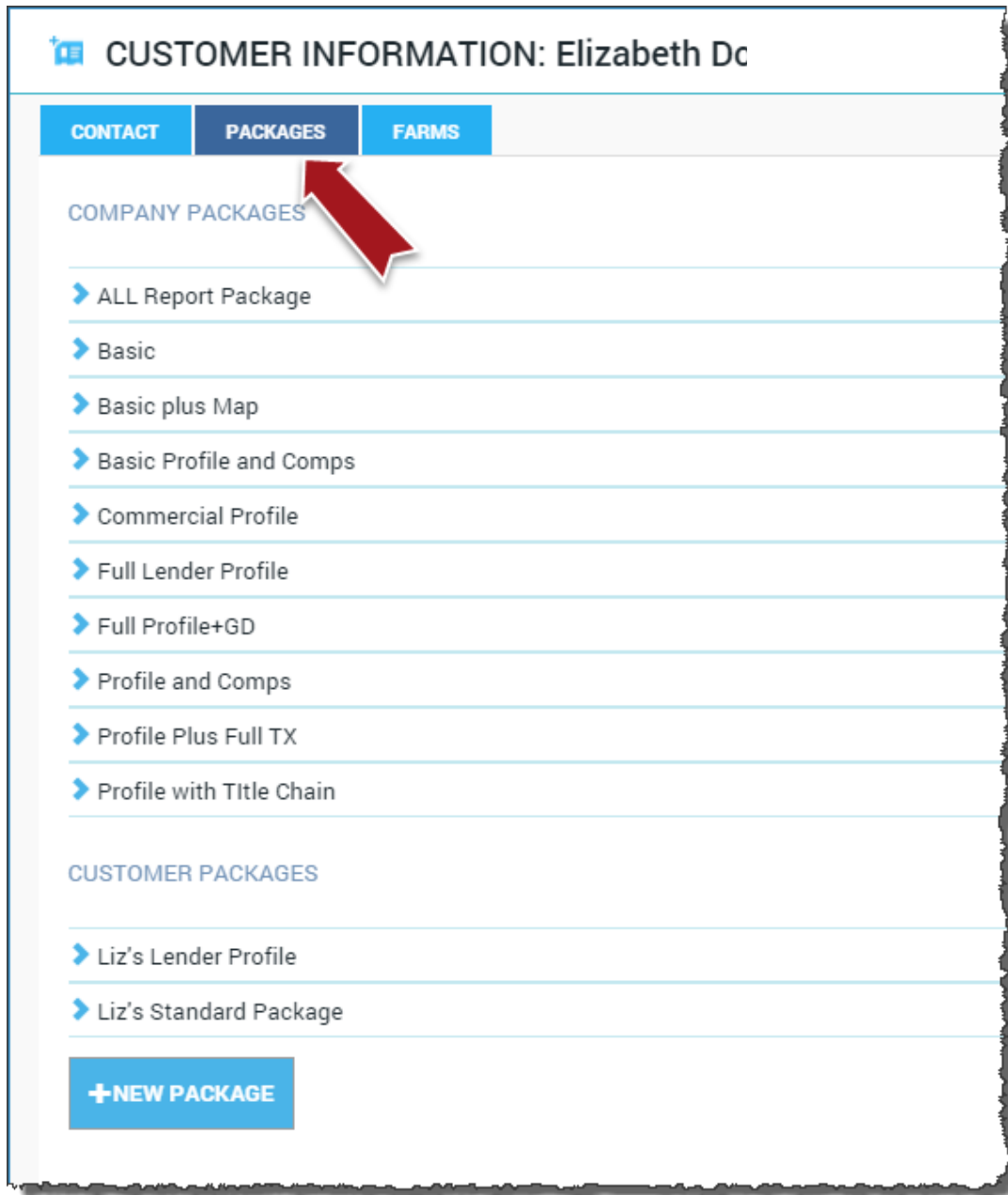
The screenshot shows a web interface for 'CUSTOMER INFORMATION: Elizabeth'. At the top, there are three tabs: 'CONTACT', 'PACKAGES', and 'FARMS'. A red arrow points to the 'FARMS' tab. Below the tabs is a table with the following columns: 'FARM', 'LAST MODIFIED', 'MODIFIED BY', and 'ACTION'. The table contains six rows of farm data. Each row has a blue 'DELETE' button in the 'ACTION' column. A second red arrow points to the 'DELETE' button for the first row, '92646 Large Lots'.

FARM	LAST MODIFIED	MODIFIED BY	ACTION
92646 Large Lots	06/09/2015	[REDACTED]	DELETE
Adams and Brookhurst	05/20/2015	[REDACTED]	DELETE
Adams and Placentia List	05/29/2015	[REDACTED]	DELETE
High Value Properties 92646	06/01/2015	[REDACTED]	DELETE
Temp Farm for Demo	05/29/2015	[REDACTED]	DELETE
Zip Code 94598 by SFR old homes	05/29/2015	[REDACTED]	DELETE

Creating Packages

A package is simply a set of commonly ordered reports that a customer uses regularly. The package allows you to quickly generate the reports in a defined sequence in with a cover page in a PDF file that can be emailed to the customer.

There are two types of packages – company packages and customer packages. Company packages are those standard packages that your company provides to several customers. They are configured by administrative users and are discussed in detail further below. Customer packages can be setup for each customer by accessing the contact card, as shown below. For specific information and examples, please [click here](#) for the eLearning module.



CUSTOMER INFORMATION: Elizabeth Dc

CONTACT **PACKAGES** **FARMS**

COMPANY PACKAGES

- ▶ ALL Report Package
- ▶ Basic
- ▶ Basic plus Map
- ▶ Basic Profile and Comps
- ▶ Commercial Profile
- ▶ Full Lender Profile
- ▶ Full Profile+GD
- ▶ Profile and Comps
- ▶ Profile Plus Full TX
- ▶ Profile with Title Chain

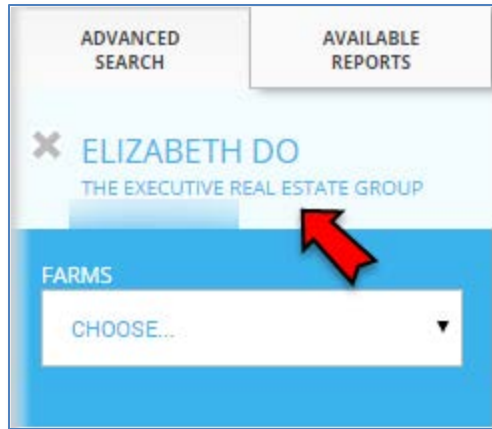
CUSTOMER PACKAGES

- ▶ Liz's Lender Profile
- ▶ Liz's Standard Package

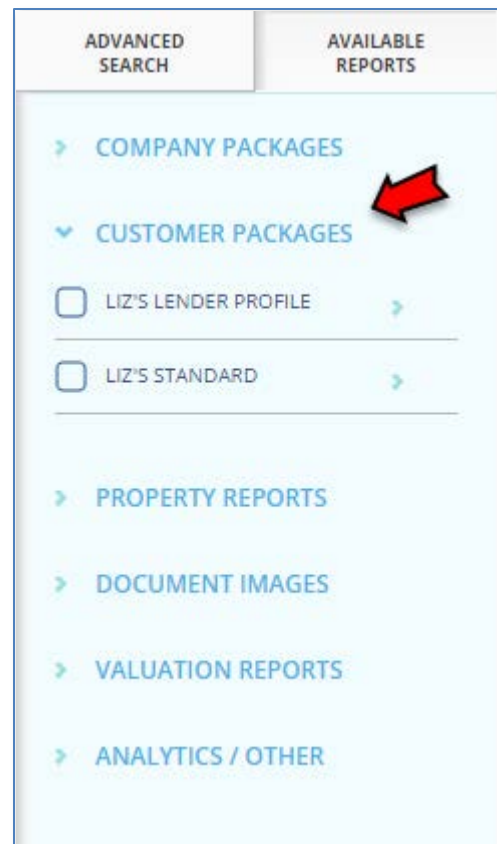
+ NEW PACKAGE

Using Packages

If customer specific packages are created, they will appear in the reports section. Remember that each customer's packages are unique to them and will only show when the customer is selected. For specific information and examples, please [click here](#) for the eLearning module.



To use the package, select a property and then click the checkbox next to the package and click Order. If you do not see the correct customer packages, ensure that you have the right customer selected.



Packages can be edited or deleted by accessing the Packages tab on the Customer's contact card, as shown here.

CUSTOMER INFORMATION: Elizabeth

CONTACT | **PACKAGES** | **FARMS**

COMPANY PACKAGES

- ▶ ALL Report Package
- ▶ Basic
- ▶ Basic plus Map
- ▶ Basic Profile and Comps
- ▶ Commercial Profile
- ▶ Full Lender Profile
- ▶ Full Profile+GD
- ▶ Profile and Comps
- ▶ Profile Plus Full TX
- ▶ Profile with Title Chain

CUSTOMER PACKAGES

▼ *Liz's Lender Profile* -- ADD REPORT --

Property Detail Report

Transaction History Full

Sales Comparables

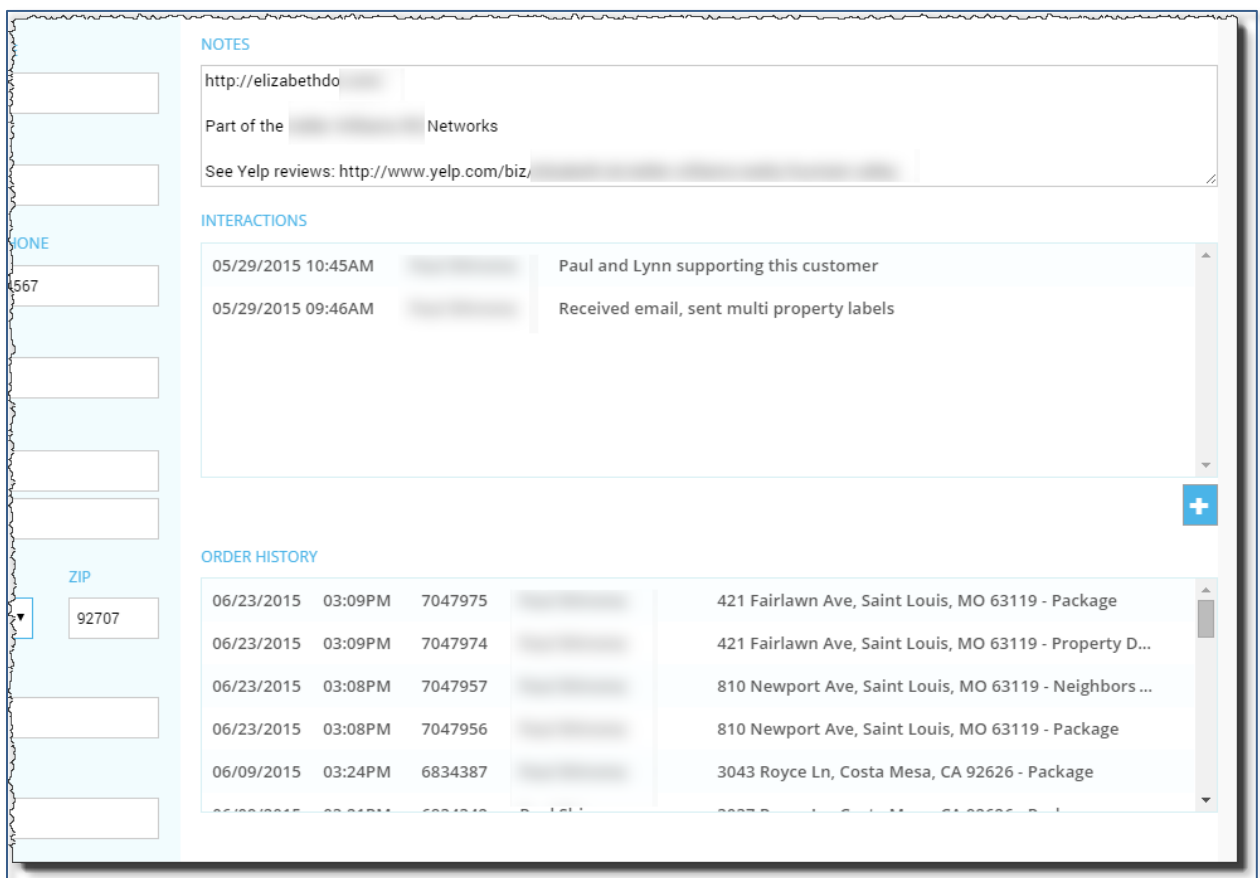
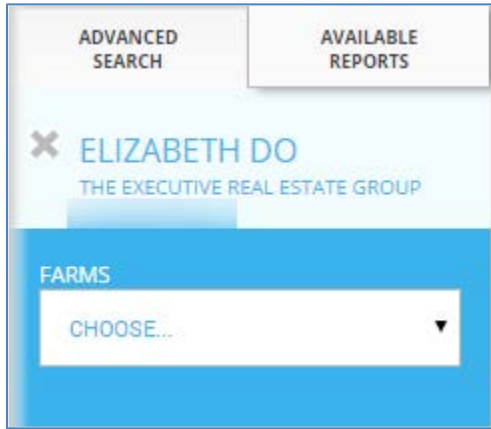
▶ Liz's Standard Package

+NEW PACKAGE

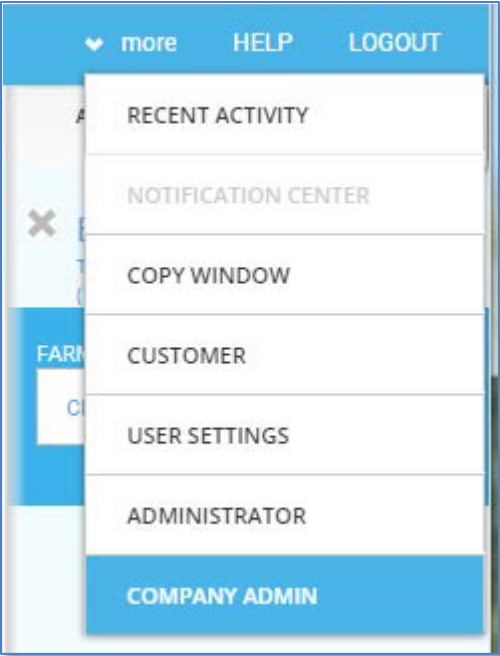
CANCEL SAVE DELETE

Customer Interactions

Upon selecting a customer, as shown here, all searches, ordered reports and documents, packages, and farms will be added to the customer's contact card. This will allow you to track your customer's orders and when and how often your staff has supported the customer.



Company Packages, Cover Pages and Sales Reps

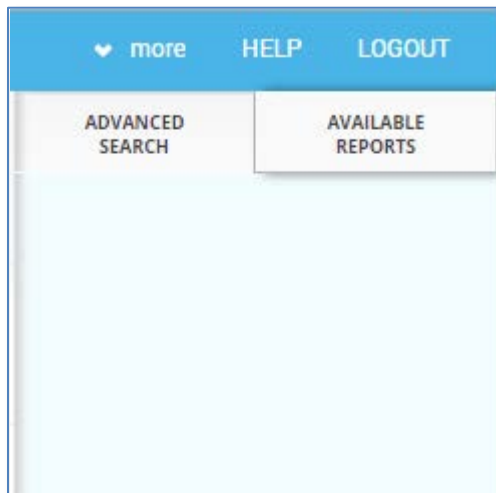


Company packages, cover pages for packages, and sales reps can be added, changed, or deleted by clicking on the Administration Icon and clicking Company Admin.

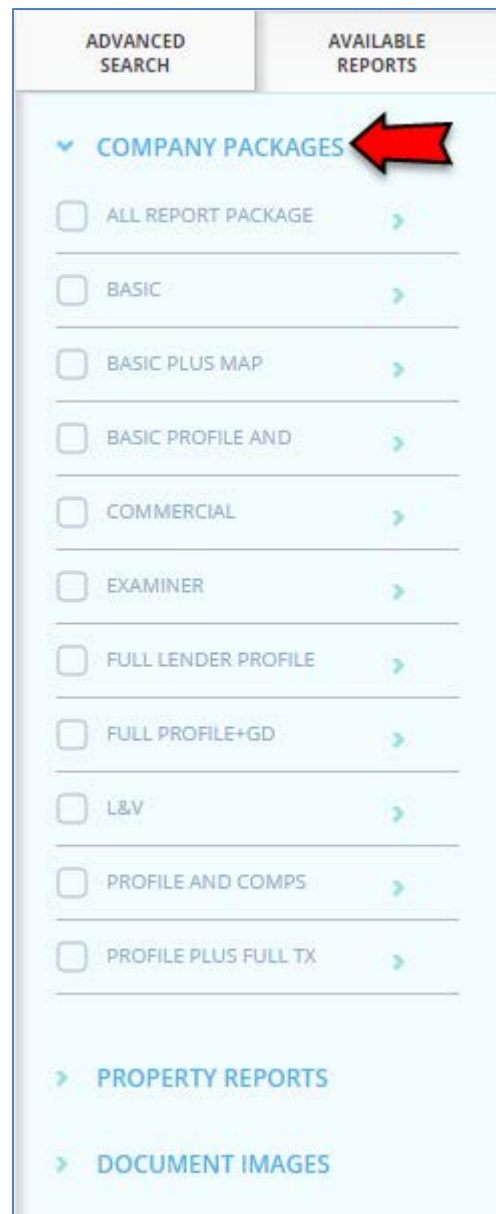
Company Packages

Company packages are packages that are available for any customer and are always available in the Available Reports panel. You do not have to select a customer to use the company packages.

In the following screenshot, no Customer has been selected but by clicking on the Available Reports tab, you will note that you can still use the company packages.

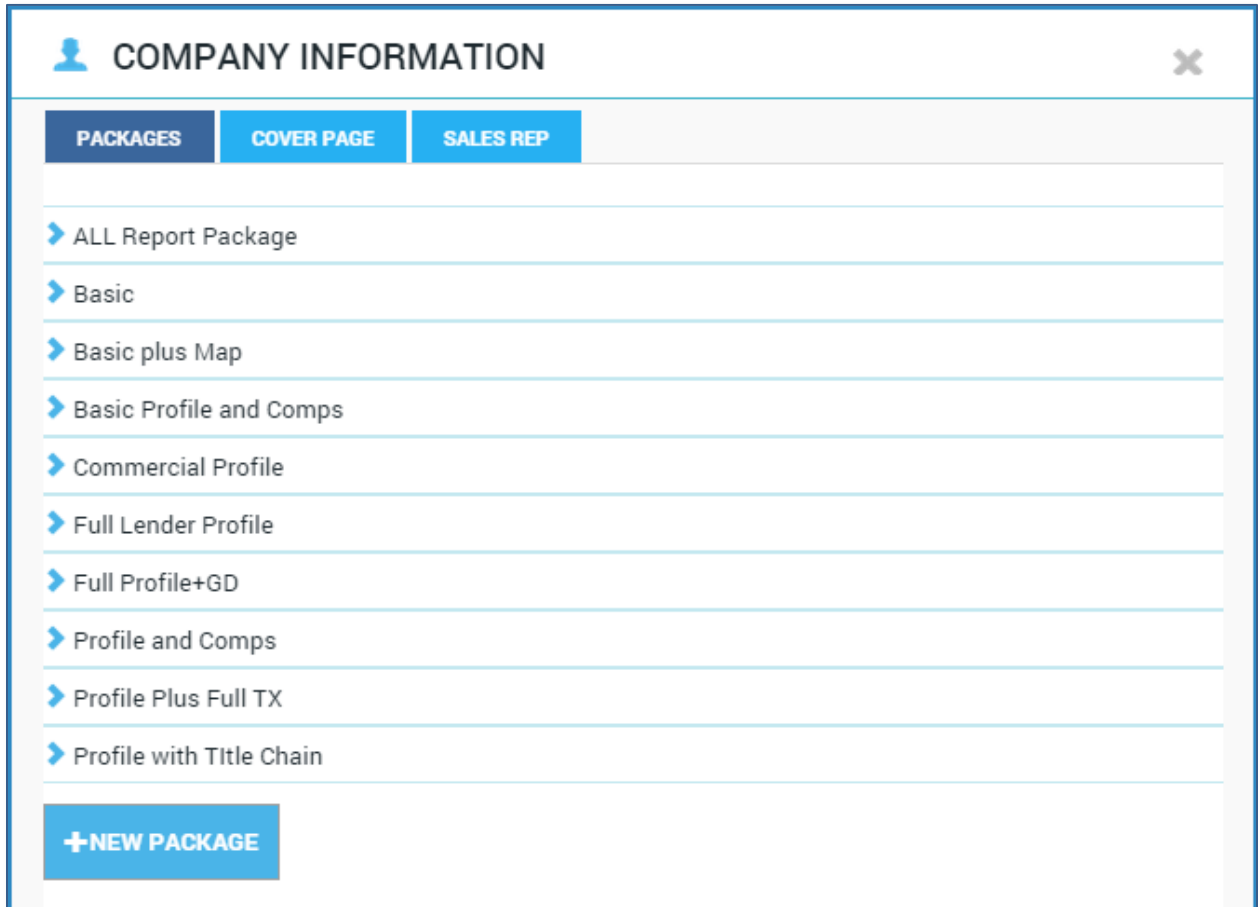


You can modify the company packages by following the Company Admin link shown previously.



Company Information: Packages

In the Packages tab, click the New Package button at the bottom to create a new package. You can also click the > symbol to edit that package.



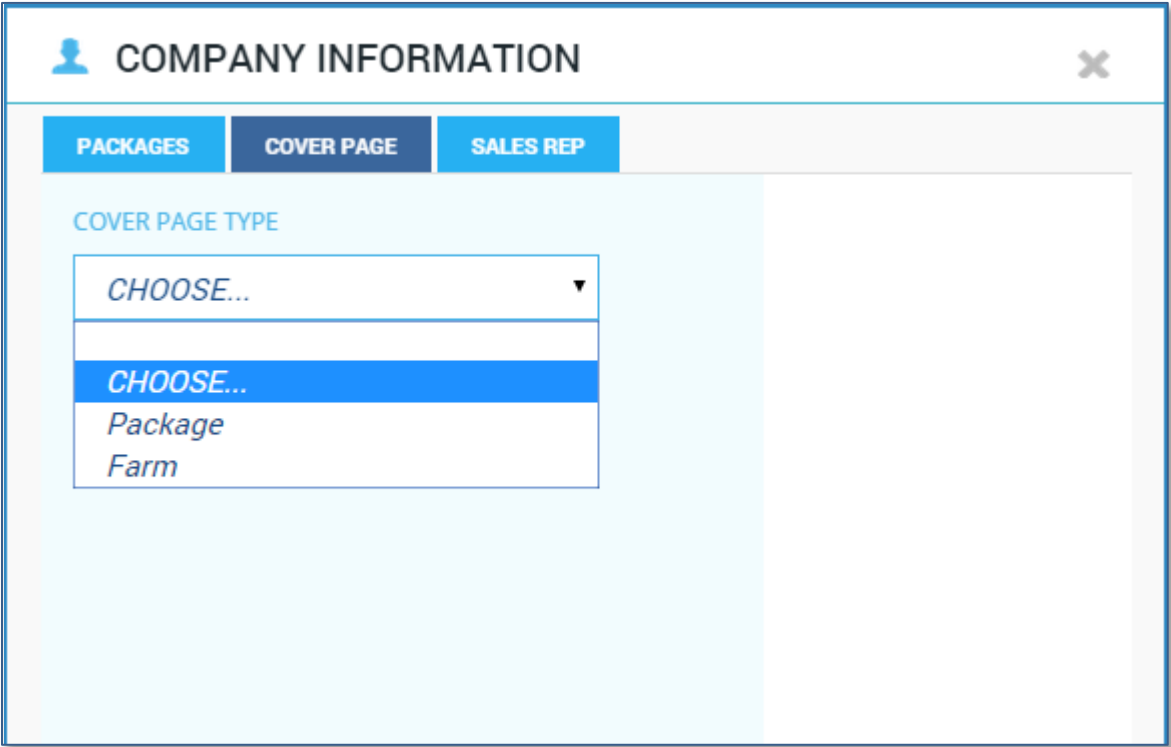
The screenshot displays a user interface for managing company information packages. At the top, there is a header bar with a person icon, the text 'COMPANY INFORMATION', and a close button (X). Below the header is a navigation bar with three tabs: 'PACKAGES' (selected), 'COVER PAGE', and 'SALES REP'. The main content area is a list of package options, each preceded by a right-pointing chevron (>):

- > ALL Report Package
- > Basic
- > Basic plus Map
- > Basic Profile and Comps
- > Commercial Profile
- > Full Lender Profile
- > Full Profile+GD
- > Profile and Comps
- > Profile Plus Full TX
- > Profile with Title Chain

At the bottom left of the list, there is a blue button with a white plus sign and the text '+ NEW PACKAGE'.

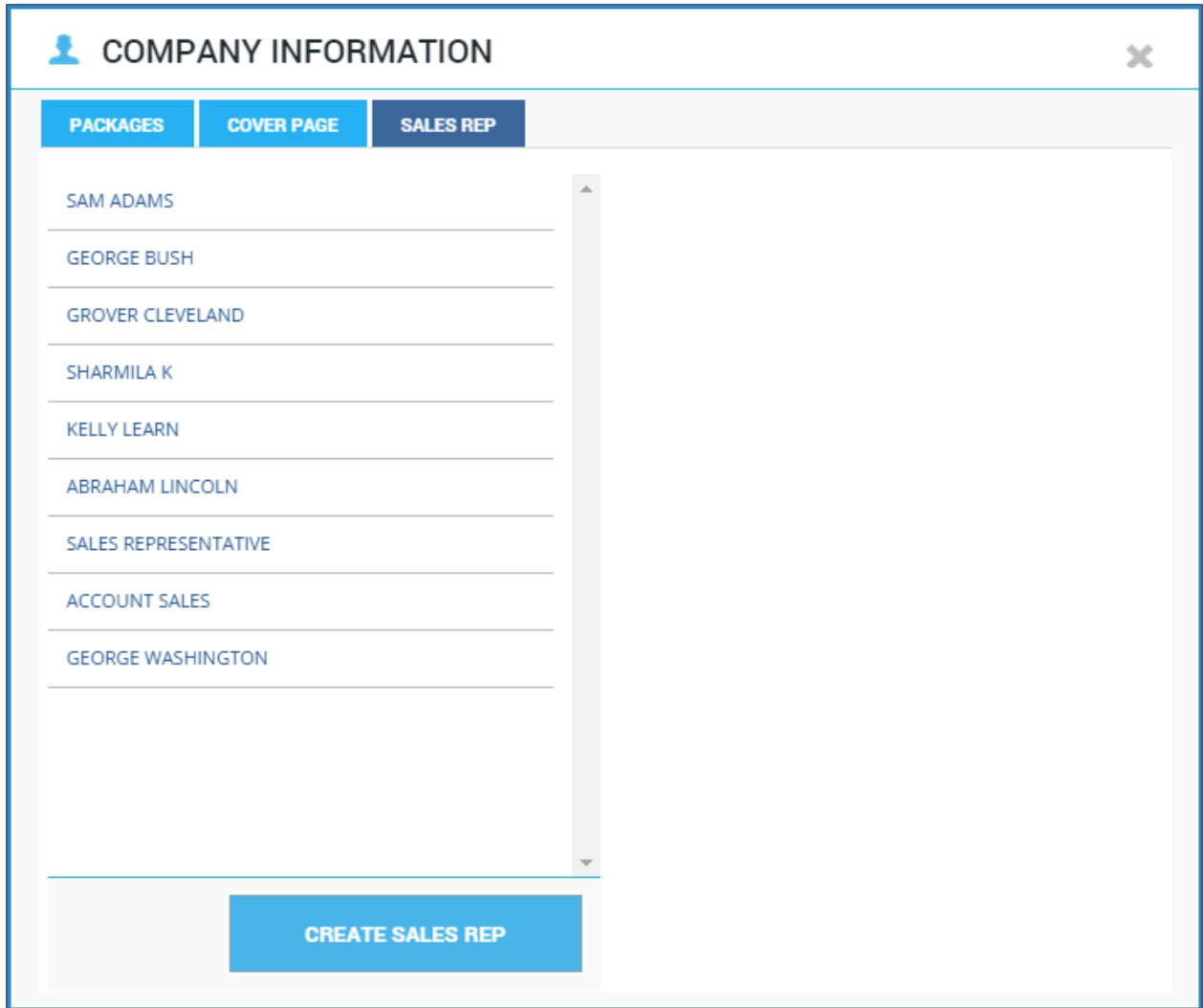
Company Information: Cover Page

Selecting the Cover Page tab will allow you to make changes to the cover page for either the Package or the Farm. This is the cover page that accompanies the reports sent to your customer.



Company Information: Sales Rep

The Sales Rep refers to the individual from your company who is assigned to one of your Customers. Add your Sales Reps here by clicking the Create Sales Rep button at the bottom of the Sales Rep tab.



The screenshot shows a dialog box titled "COMPANY INFORMATION" with a close button (X) in the top right corner. Below the title bar are three tabs: "PACKAGES", "COVER PAGE", and "SALES REP", with "SALES REP" being the active tab. The main content area is a scrollable list of text entries, each followed by a horizontal line. The entries are: SAM ADAMS, GEORGE BUSH, GROVER CLEVELAND, SHARMILA K, KELLY LEARN, ABRAHAM LINCOLN, SALES REPRESENTATIVE, ACCOUNT SALES, and GEORGE WASHINGTON. At the bottom of the dialog box is a blue button labeled "CREATE SALES REP".

Sales Reps entered here will appear in the Customer Contact Card at the bottom of the card.



This image shows a close-up of a light blue rectangular field labeled "SALES REP" in blue text. Below the label is a white rectangular input box with a thin border, intended for entering a sales representative's name.

Support:

For more information on using the customer feature or for general support: Support options can be found in the user controls on the lower left hand side of the TitleFlex window.



Should you need immediate support, use the TitleFlex Live Chat feature.

The Feedback button will allow you to provide TitleFlex with immediate instant feedback on how the platform is functioning for you

Click the Help link for additional support and training resources.

