

BROWSER SETTINGS

Rev. 201904

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Overview

The three most common browsers are listed below with instructions on how to set them up for best performance for TitleFlex. Additionally, how to retrieve your password or username are included.

Before you Begin:

Three settings will need to be modified:

- 1. Trusted Sites: Adding TitleFlex as a trusted site.
- 2. Allowing popups
- 3. Clearing the cache on browser exit

The different browsers and browser versions all set these features up slightly different. Please work with your IT unit as system policies may prevent modification.

The steps shown here may differ from your company's browser installations and not all features my be modified by end-users.

Internet Explorer and Edge

Trusted Site:

- 1. Start > Control Panels > Internet Options, click Security tab.
- 2. In the Internet Options dialog box, click the Security Tab.
- 3. In the Security Tab, click the Trusted Sites icon at the top and click the Sites button.
- The Trusted Sites dialog box will open. In the "Add this website to the zone", enter: <u>https://titleflex.datatree.com</u> Click Add

Trusted sites

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- 5. Click Close on the Trusted Sites dialog box.
- 6. Click Apply on the Internet Options dialog box.

	You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
😭 Internet Properties ? 🗙	uns zone will use une zone's security securitys.
	Add this website to the zone:
General Security Privacy Content Connections Programs Advanced	https://titleflex.datatree.com Add
Select a zone to view or change security settings.	Websites:
	*.corp.insight.com
	*.crm.dynamics.com
Internet Local intranet Trusted sites Restricted sites	×
Trusted sites	Require server verification (https:) for all sites in this zone
This zone contains websites that you trust not to damage your computer or your files. You have websites in this zone.	Close
Security level for this zone	
Custom Custom settings. - To change the settings, dick Custom level. - To use the recommended settings, dick Default level.	
Enable Protected Mode (requires restarting Internet Explorer) Custom level Default level	
Reset all zones to default level	
Some <u>settings</u> are managed by your system administrator.	
OK Cancel Apply	

Remain in the Internet Properties dialog box.

Popup Blockers

- 1. Click the Privacy Tab
- 2. In the Privacy Tab, m pop-up blocker is set
- 3. Click Apply.

Keep the dialog box open.

Cache

- 1. Click the General Tab
- 2. In the Browsing Histo enable "Delete brow exit".
- 3. Click "Delete" to imn the temporary files.

Appearance

Colors

Delete browsing history on exit

Languages

Some settings are managed by your system administrator.

OK

Delete...

Fonts

Cancel

1.	Click the Privacy Tab	🍖 Inter	net Proper	rties				?	×
2.	In the Privacy Tab, make sure the								
	pop-up blocker is set to off.	General	Security	Privacy	Content	Connections	Program	3 Adva	nced
3.	Click Apply.	Setting	IS						-
						Sites	Ad	lvanced	
eep tł	ne dialog box open.	Locatio	n						_
ache		⊠ Nev phy	ver allow we vsical locatio	ebsites to on	request yo	ur	Cle	ear Sites	
1.	Click the General Tab		Blocker -						_
2.	In the Browsing History section,	Tun	n on Pop-u	p Blocker			S	ettings	
	enable "Delete browsing history on	InPriva	ite					-	_
	exit".	🗹 Disa	able toolbar	rs and ext	tensions wh	en InPrivate B	Browsing st	arts	
3.	Click "Delete" to immediately clear								
	the temporary files.								
4.	Click Okay								
👌 Inte	rnet Properties	? ×	<						
Genera	Security Privacy Content Connections Programs	Advanced	1						
Home	page								
	To create home page tabs, type each address on its o	own line.							
	https://falive.net/welcome	\sim	: <u>settin</u>	i <u>gs</u> are ma	anaged by y	your system a	dministrato	r.	
		\sim			Ok	(C	ancel	App	ply
	Use current Use default Use n	new tab							
Start		ew tab							
	Start with tabs from the last session								
	Start with home page								
Tabs									
Cha	ange how webpages are displayed in tabs.	abs							
Brow:	sing history								
	ete temporary files, history, cookies, saved passwords, and m information.	d web							

Apply

Settings

Accessibility

Chrome

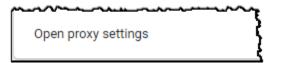
Trusted Site:

Chrome uses Window's Internet Settings for trusted sites.

- 1. Click the Chrome Menu button
- 2. Select Settings

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Se	ttings			
He	łp			•
Exi	it	~~~~~~		

- 3. In the Settings window, click Advanced Settings at the bottom of the page.
- 4. Scroll down and click "Change Proxy Settings" in the Network section



- 5. In the Internet Options dialog box, click the Security Tab.
- 6. In the Security Tab, click the Trusted Sites icon at the top and click the Sites button.
- 7. The Trusted Sites dialog box will open. In the "Add this website to the zone", enter: https://titleflex.datatree.com Click Add
- 8. Click Close on the Trusted Sites dialog box.
- 9. Click OK on the Internet Options dialog box.

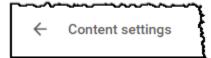
Remain in the Chrome Settings window to setup the Popup Blocker.

#### **Popup Blockers**

- 1. In the advanced settings, scroll to the Privacy Section and click "Content Settings..."
- 2. Scroll down in the Content Settings window to the Pop-ups section
- 3. Allow pop-ups and redirects

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	Pop-ups and redirects Allowed				

Click the back arrow to return to the top Settings menu.



to consumer privacy and solicitation.

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Cache

- 1. While still in the Settings window, scroll to the top and click History at the top left hand side of the window.
- 2. Click "Clear browsing Data"
- 3. Select how much history should be deleted and which items should be deleted.
- 4. Click Clear browsing data.
- 5. Close the Settings tab.

Clear browsing data Clear history, cookies, cache, and more

Clea	ar brows	ing data			
		Basic		Advanced	
Time	e range	All time	•]	•
~	Browsii 112 ite	Last 7 days Last 4 weeks			
~	Downlo None	All time			
~	Cookie From 4	s and other site data sites			
~	Cacheo 40.5 M	l images and files B			
~	Passwo None	ords and other sign-in data			
_	Autofill	form data			•
				Cancel Clear dat	a

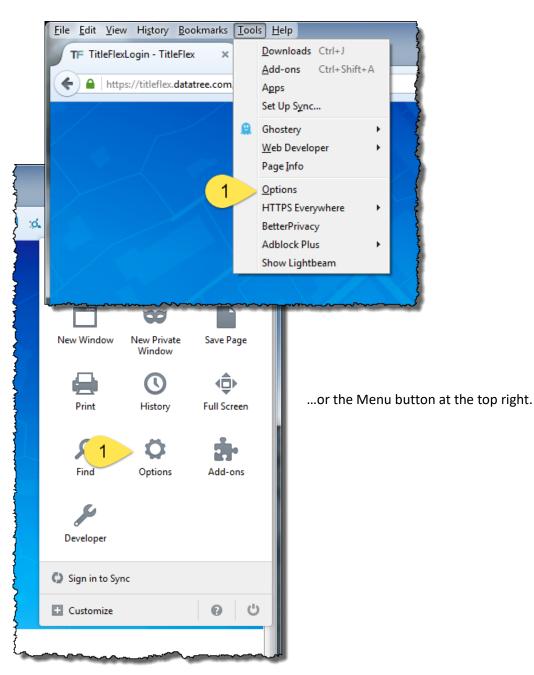
Firefox

Trusted Site:

Firefox does not support the concept of a trusted site. The browser is still supported by TitleFlex.

Popup Blockers

1. Access the Options either through the Tools Menu at the top left ...



- 2. In the menu on the left hand frame, Select Privacy & Security > Permissions.
- 3. Deselect Popups
- 4. Remain in the Privacy & Security section.

Q Search	Permissions
🎒 Privacy & Security	Permissions
C Firefox Account	O Location
	Camera
	Microphone
	Notifications Learn more
	Pause notifications until Firefox restarts
	Block websites from automatically playing sound
	✓ Block pop-up windows
	✓ <u>W</u> arn you when websites try to install add-ons
	Prevent <u>a</u> ccessibility services from accessing your browser Learn more

Cache

- 1. n the History section, select how much history Firefox will retain.
- 2. Close the Options tab.

Privacy & Security	History		
G Firefox Account	Firefox <u>w</u> ill	Never remember history	
	Firefox will use the same settings as private browsing, and will not		Clear Hi <u>s</u> tory
	remember a	any history as you browse the Web.	
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## **Logging In**

In your browser, navigate to https://titleflex.datatree.com/Account/Login.

Enter your username and password and click Login.

If you forgot your username or password, click the Forgot ... link, shown in the screenshot. You can also cache your username and password by clicking Remember Me.

