



TitleFlex
by Data Trace

CREATING AND MANAGING CUSTOMERS AND CUSTOMER PACKAGES

Rev. 201704

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Customers

Add your customers to TitleFlex to track interactions and deliveries to them. You can create custom farms, cover pages, and packages for unique to each customer.

New Customers

To create a new customer, click the New Customer button in the Customer Center and complete the fields. When creating a new customer, you can add the customer information along with any notes or interactions that may have occurred. Custom packages and saved farms are only available after saving the customer card. Click Create Customer at the bottom left to save the entry.

A Completed Customer Card:

The screenshot shows a 'CUSTOMER INFORMATION: Pam Etem' window with several tabs: CONTACT, PACKAGES, FARMS, and IMPORT. The CONTACT tab is active, displaying the following information:

- FIRST NAME:** Pam
- LAST NAME:** Etem
- COMPANY:** Team Etem
- OFFICE PHONE:** 714-406-3838
- MOBILE PHONE:** 714-555-1234
- EMAIL:** Pam@teametem.com
- ADDRESS:** 2100 Main Street #350
- CITY:** Huntington Beach
- STATE:** CA
- ZIP:** 92648
- CUSTOMER ACCOUNT #:** 1
- SALES REP:** Jim Portner - jportner@firstam.com - (714) 250-5642

NOTES:

- http://www.teametem.com/
- Part of the Keller Williams RE network. Operates primarily in Orange County and Riverside County.
- Pam prefers the Standard package for all customers unless otherwise indicated.

INTERACTIONS:

Date	Time	By	Description
12/03/2015	10:18AM	Paul Shiroma	Standard customer service call: Merry Christmas and Happy...
11/18/2015	01:53PM	Paul Shiroma	Emailed pam her list of addresses.
06/23/2015	09:11AM	Paul Shiroma	This is a not for me interaction and terrible spellin

ORDER HISTORY:

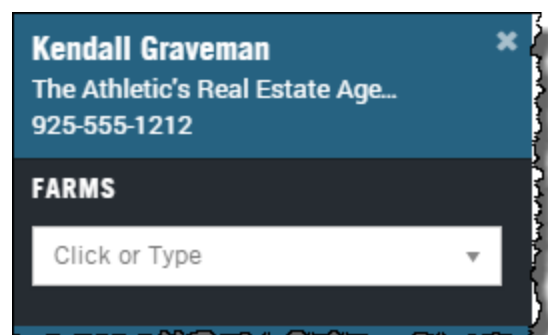
Date	Time	By	Property	Description
03/09/2017	01:10PM	21869453	Paul Shiroma	1901 Duke Dr, Richardson, TX 75081 - Sales Compara...
03/09/2017	12:10PM	21867298	Paul Shiroma	Multi Property - Order Label
03/09/2017	12:10PM	21867280	Paul Shiroma	Multi Property - Order Label
01/25/2017	09:21AM	21046445	Paul Shiroma	4790 S Elves Chasm Trl, Flagstaff, AZ 86005 - Assessor...
01/25/2017	09:21AM	21046443	Paul Shiroma	4790 S Elves Chasm Trl, Flagstaff, AZ 86005 - Package

At the bottom right of the window are buttons for DELETE, PRINT, CANCEL, and SAVE.

Existing Customer

To update or modify an existing customer, in the Customer Center dialog box, click on the customer name in the Recent Customers list or use the filters to locate them. Click on the customer name. Once selected, the customer will appear at the top of the left hand panel, as shown here.

Click on the customer name to access their customer contact card. Once the customer contact card appears, you can create custom packages, delete Farms, add interactions, or update their contact information.



Managing Customers

Any property searches, reports or documents ordered, or lists generated will be saved in the Order History section of the Customer's contact card for future reference.

Close up of Notes, Interactions, and Order History.

NOTES

Mr Graveman prefers to be addressed as "Kendall". Remember to spell with two "L's".
Is married, with two children, primary school, one boy, one girl.
Primary area is East SF Bay are - including Orinda, Lafayette, Concord, Walnut Creek, Richmond, south to Alamo along 680; includes Contra Costa County generally.
<http://www.BayAreaRE.com/kgraveman.html>

INTERACTIONS

03/13/2017 10:08AM	Paul Shiroma	Provided multi-line reports.
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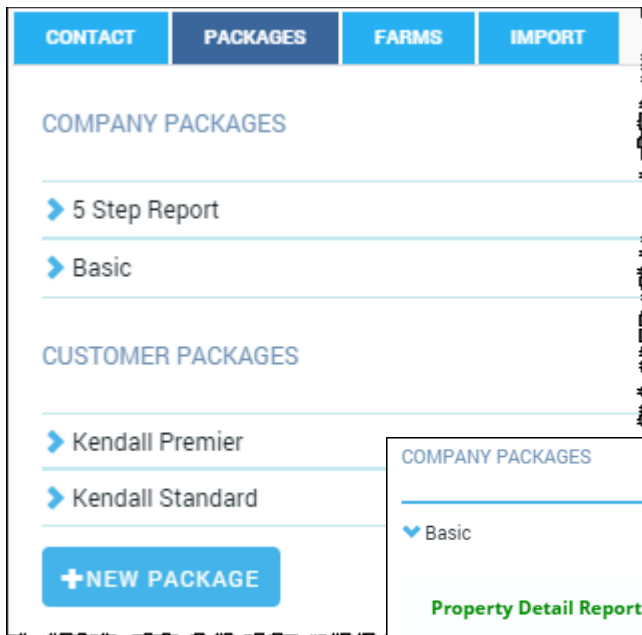
ORDER HISTORY

03/06/2017	11:08AM	245500	Paul Shiroma	Multi-Property - Five Line Report
03/06/2017	11:02AM	245498	Paul Shiroma	Multi Property - Order Label
02/28/2017	03:30PM	243055	Paul Shiroma	2620 San Benito Dr, Walnut Creek, CA 9...
02/28/2017	02:31PM	243034	Paul Shiroma	55 Brandon Rd, Pleasant Hill, CA 9452...

Customer information and Order History is exportable by your Company Admin.

Packages

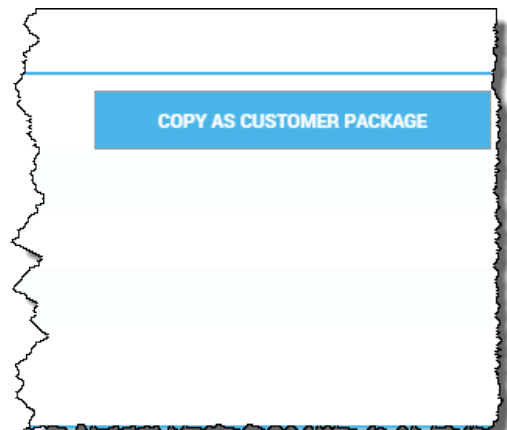
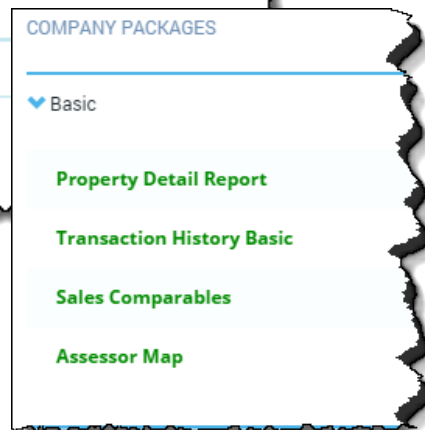
Each customer can have their own set of packages unique to them. To create customer packages, click on the Packages tab in the Customer window.



Your Company administrator creates company packages. These are available to any customer.

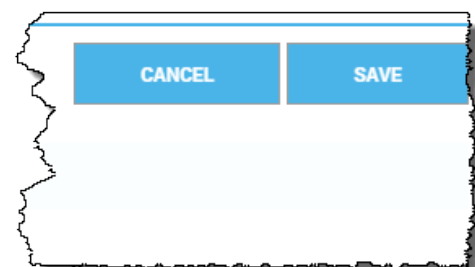
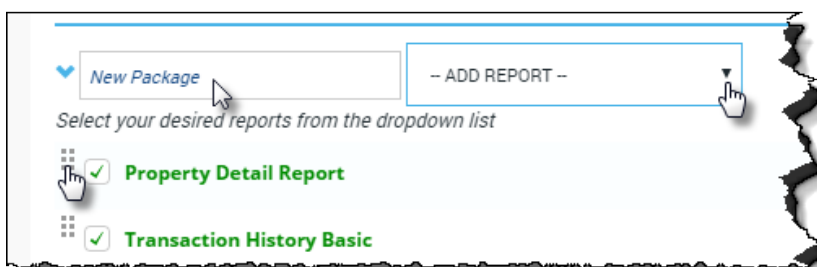
You can use these as a starting template or you can just create a new package by clicking on New Package.

Click on the ">" to open a Company package and review the reports that are part of the package.



Building and Modifying Customer Packages:

Create a new package by clicking New Package (or click Copy as Customer Package as shown in the Company packages) and adding reports or changing their order.



Click and drag **handle** to change the order of the reports.

Deselect the check box to remove the report. The report will be removed when you save the package.

Click Save when done. You can always modify them later as well.



Farms

Rename or delete farms in the Customer Contact Card by clicking on the Farms tab in the Customer's contact card.

FARM		LAST MODIFIED	MODIFIED BY	
94598 4-6 Bdrm	RENAME	03/06/2017	Paul Shiroma	DELETE
Firestone Drive	RENAME	03/06/2017	Paul Shiroma	DELETE
My List	RENAME	02/28/2017	Paul Shiroma	DELETE

Create new farms or modify existing farms in the main TitleFlex window.

Import Farms:

Import lists created outside of TitleFlex and save them to a customer. You can then export them that list with a custom cover page and generate multi-line reports or mailing labels.

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

IMPORT FARM

Upload an Excel file of addresses or APNs to create a farm. You may upload up to three files at a time. An input template is provided below.

No file chosen

.xlsx files only

[Download Input Template](#)

	A	B	C	D	E	F
1	Street Address	City	State	ZIP	County	APN
2						
3						
4						
5						
6						
7						
8						
9						
10	Instructions:	Enter an address, city, state, zip OR the APN County, State.				
11		Remove these instructions prior to uploading your input file.				