

Innovations to GO BEYOND
TITLE DATA and AUTOMATION

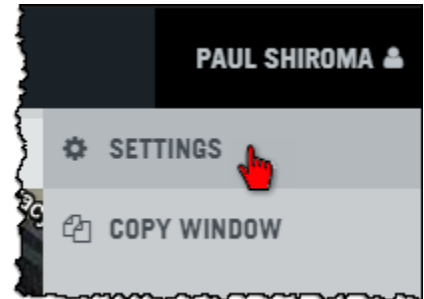
USER SETTINGS

Rev. 201904

Overview

This how to guide covers configuring the **default** user preferences and settings in TitleFlex and includes topics such as report options, notification emails, cover pages and usage statistics. Remember that these are user-specific settings and do not change the settings for the company.

Access the user settings from the Profile menu with your name.



The settings dialog window covers four areas:

- User Account Information including the ability to change the user's password
- User Preferences affecting report displays and email options
- Usage information for that user

NOTE: Not all the functionality discussed here may be displayed in your account as some of the features may not have been included in your company's contract.

Account Tab

The user can change their password (1) from this tab or notify their local admin to update the contact information (2).

The screenshot shows a 'SETTINGS' window with a sidebar on the left containing menu items: ACCOUNT (USER ACCOUNT INFORMATION), PREFERENCES (USER PREFERENCES), COVER PAGE (COVER PAGE & LOGO), and USAGE REPORT (ACTIVITY ANALYTICS). The main content area is titled 'USER ACCOUNT INFORMATION' and contains the following fields: Name (Paul), Company, Email, Phone, Address (4 First Way, address213, Santa Ana, CA 92708), and Account ID (2000001). A callout '3' points to the Account ID field. Below these fields is a link with an envelope icon and the text 'Contact your account administrator to update your information', with callout '2' pointing to it. At the bottom of the main area is a 'CHANGE PASSWORD' section with callout '1', containing three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

The Account ID field (3) is important as occasionally you may need to provide this to the TitleFlex Customer Service team should you ever need to call or text for assistance with the product.

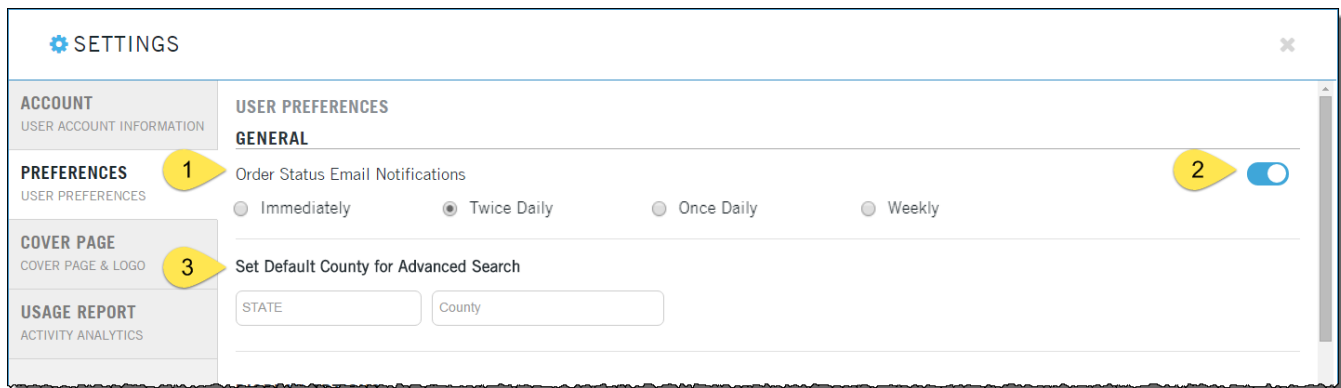
Preferences Tab

The Preferences Tab contains options for email notifications from the Order Portal, report display options, and other email options. Scroll down through this tab to view the different options.

NOTE: Not all the functionality discussed here may be displayed in your account as some of the features may not have been included in your company's contract.

General Section

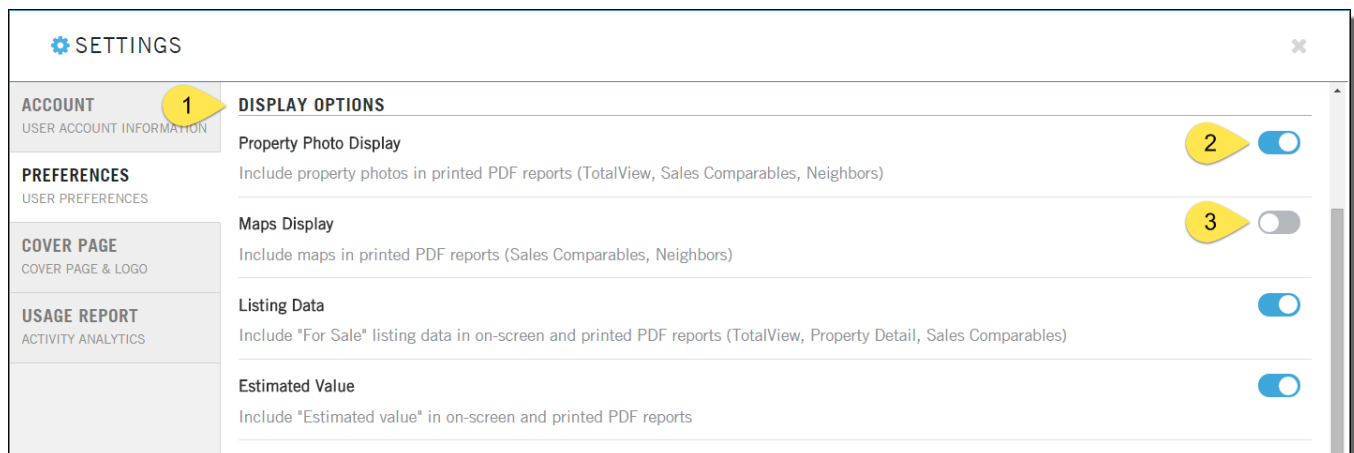
The Order Portal allows ordering batches of reports and provides email notification to the user. The frequency of the emails can be set for once or twice a day (default) and weekly (1). Additionally, the emails can be turned off entirely (2).



If users research focuses a great deal in one county, a default county can be setup (3). This affects the Advanced Search feature so that the default county is automatically setup thereby removing a step for the user.

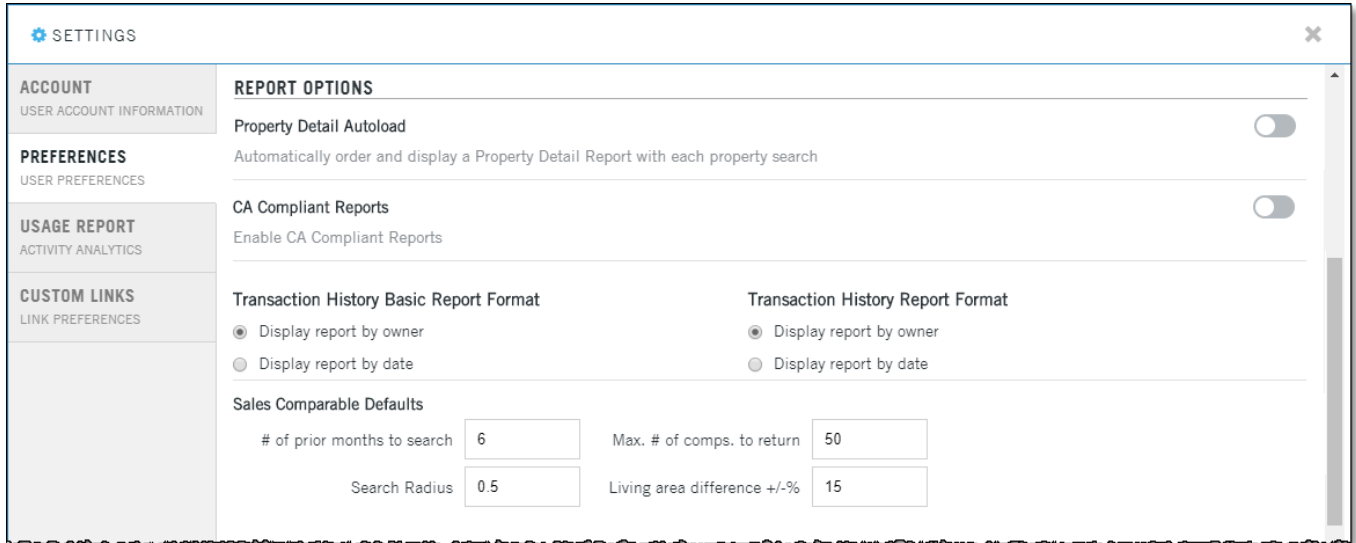
Display Options

Selected reports can have specific information (1) hidden for compliance or regulatory purposes. This might include hiding the property photos or estimated value from the report. Simply toggle the switch on (2) or off (3) to display or hide the information.



Report Options

The options in this section affect the Property Detail, Transaction History, Sales Comparable reports and PDF report generation.



SETTINGS

ACCOUNT
USER ACCOUNT INFORMATION

REPORT OPTIONS

Property Detail Autoload

Automatically order and display a Property Detail Report with each property search

CA Compliant Reports

Enable CA Compliant Reports

Transaction History Basic Report Format

Display report by owner
 Display report by date

Transaction History Report Format

Display report by owner
 Display report by date

Sales Comparable Defaults

of prior months to search Max. # of comps. to return

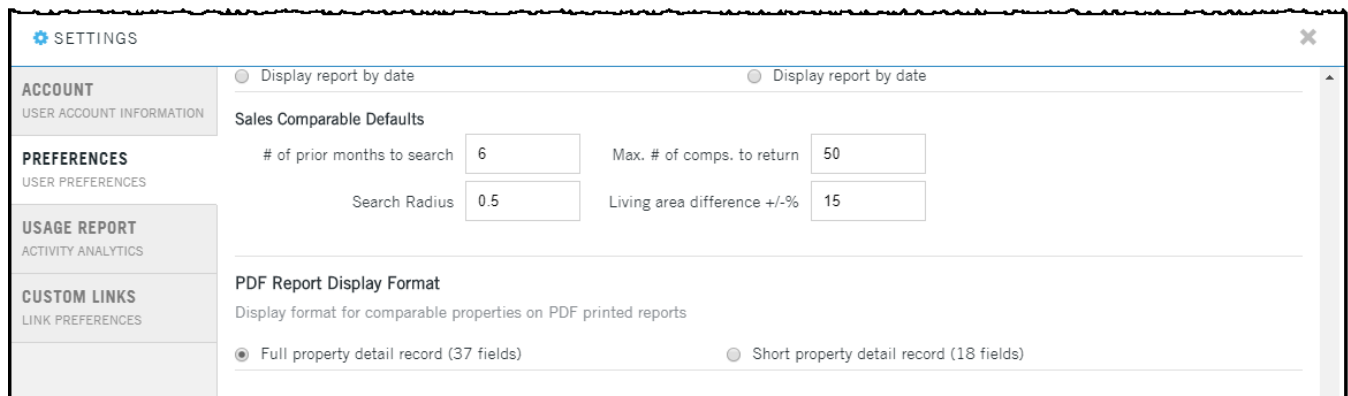
Search Radius Living area difference +/-%

Property Detail Autoload

The Property Detail report (1), can be setup to **automatically load** every time a property is selected.

NOTE: Enabling this option may incur a charge as it is effectively ordering the report automatically. Check with your contract administrator or company TitleFlex administrator before enabling this feature.

Continued ...



SETTINGS

ACCOUNT
USER ACCOUNT INFORMATION

PREFERENCES
USER PREFERENCES

USAGE REPORT
ACTIVITY ANALYTICS

CUSTOM LINKS
LINK PREFERENCES

Display report by date Display report by date

Sales Comparable Defaults

of prior months to search Max. # of comps. to return

Search Radius Living area difference +/-%

PDF Report Display Format

Display format for comparable properties on PDF printed reports

Full property detail record (37 fields) Short property detail record (18 fields)

Transaction History Report Formats – Basic and Full

Both Transaction History reports can be setup to display the documents either in chronological date order or grouped by owner and then by type (liens and conveyances).

Display by Owner is the default as shown. You can change the default display by selecting the radio button for displaying the report in date order.

PREFERENCES
USER PREFERENCES

Transaction History Basic Report Format

Display report by owner

Display report by date

Transaction History Report Format

Display report by owner

Display report by date

Transaction History Basic

Orange County Data as of: 12/27/2016

Current Owner: Cloud Lloyd A [View report in Date format](#)

Vesting: Single Man / Joint Tenant
2001 - Present

LIENS									
Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
<input type="checkbox"/> 09/01/2004	Trust Deed/Mortgage		\$370,000	Cloud Lloyd A	American Mortgagebanc	Conventional	Var /		2004.792033
<input type="checkbox"/> 06/08/2001	Trust Deed/Mortgage	✓	\$272,650	Ellis Denise	Chase Manhattan Mortgage Corp	Conventional	Var /		2001.378113

[ORDER](#)

CONVEYANCES									
Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #	
<input type="checkbox"/> 08/04/2004	09/01/2004				Security Union Title	Cloud Lloyd A	Ellis Denise	2004.792032	
<input type="checkbox"/> 05/11/2001	06/08/2001	✓	\$287,000	Full Value	American Title	Ellis Denise	Marston Keith P	2001.378112	

[ORDER](#)

Prior Owner: Marston Keith P
1992 - 2001

LIENS					
Date	Type	Verified	Amount	Borrower(s)	Lender
<input type="checkbox"/> 07/20/1995	Trust Deed/Mortgage		\$180,800	Marston Keith P	American Bank

Report Grouped by Owner (left)

The same Transaction History report ordered chronologically (below)

Transaction History Basic

Orange County Data as of: 12/27/2016

Current Owner: Cloud Lloyd A [View report in Owner format](#)

Vesting: Single Man / Joint Tenant
2001 - Present

Date	Type	Amount	Borrower(s)	Lender	Buyer	Seller	+ Details
<input type="checkbox"/> 09/01/2004	Sale				Cloud Lloyd A	Ellis Denise	+
<input type="checkbox"/> 09/01/2004	Finance	\$370,000	Cloud Lloyd A	American Mortgagebanc			+
<input type="checkbox"/> 06/08/2001	Sale	\$287,000			Ellis Denise	Marston Keith P	+
<input type="checkbox"/> 06/08/2001	Finance	\$272,650	Ellis Denise	Chase Manhattan Mortgage Corp			+
<input type="checkbox"/> 07/20/1995	Finance	\$180,800	Marston Keith P	American Savings Bank			+
<input type="checkbox"/> 06/02/1992	Sale				Marston Keith P	Marston, Keith P	+
<input checked="" type="checkbox"/> 06/02/1992	Finance	\$184,500	Marston Keith P	Directors Mortgage Loan Corp			+

[ORDER](#)

Sales Comparable Defaults

A Sales Comparable will use the search radius, prior months, living area and number of returns as shown in the Preferences.

The screenshot shows the 'PREFERENCES' section with 'USER PREFERENCES' on the left. The main area is titled 'Sales Comparable Defaults' and contains four input fields:

# of prior months to search	6	Max. # of comps. to return	50
Search Radius	0.5	Living area difference +/-%	15

Modification of these defaults will change the parameters used by the Sales Comparable reports for all future comparable reports run by that user.

PDF Report Display Format

This option allows the user to change the PDF output of the Property Detail Report. Some states restrict what information can be displayed under certain circumstances. Check with your compliance or underwriting unit for more information.

The screenshot shows the 'PREFERENCES' section with 'USER PREFERENCES' on the left. The main area is titled 'PDF Report Display Format' and contains the following text and options:

Display format for comparable properties on PDF printed reports

Full property detail record (37 fields) Short property detail record (18 fields)

Email Options

The users can now specify a "from" address as well as automatically copy the email to another recipient using the email options shown here.

The screenshot shows the 'PREFERENCES' section with 'USER PREFERENCES' on the left. The main area is titled 'EMAIL OPTIONS' and contains two sections:

Default "From" Address
When sending reports and images always use this "From" address as the default:

Copy Email Address
When sending reports and images always CC (send a copy) to this email address:

Usage Report Tab

The last tab allows a user to view, track and export their usage by month. Usage for the selected month can also be exported into a csv file.

⚙️ SETTINGS
✕

ACCOUNT
USER ACCOUNT INFORMATION

PREFERENCES
USER PREFERENCES

USAGE REPORT
ACTIVITY ANALYTICS

CUSTOM LINKS
LINK PREFERENCES

USAGE REPORTS

April 2019

Export Details

Date	Last Transfer Document	Last Finance Document	Sales Comparables	Property Detail Report	Transaction History Report	Spec
4/15/2019	10	3	0	22	16	
4/12/2019	0	0	1	1	0	
4/9/2019	0	0	0	27	0	
4/8/2019	0	0	0	5	1	
Total Request	10	3	1	55	17	
Total Amount	\$10.00	\$3.00	\$0.00	\$0.00	\$0.00	
Grand Total						

Note: The usage and pricing for Flood, Property Ownership, Appraisal and True Legal & Vesting products are not available in this report.