



TitleFlex
by Data Trace

MANAGING AND EXPORTING FARMS:

*SAVING AND MODIFYING FARMS
MULTILINE REPORTS, LABELS AND EXPORTS*

Rev. 201608

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Table of Contents

Overview.....	2
Managing Farms:	3
Exports:.....	4
Multiline Reports (Multi):.....	5
Labels:.....	7
Export Options:.....	9

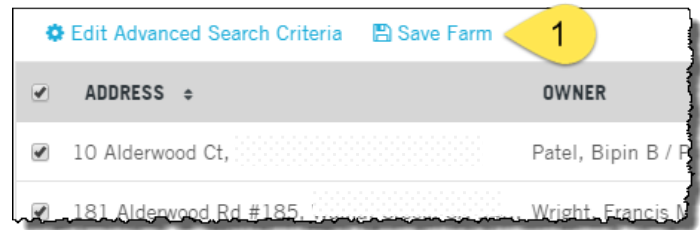
Overview

This document covers saving, renaming, and deleting farms and the three different export options available.

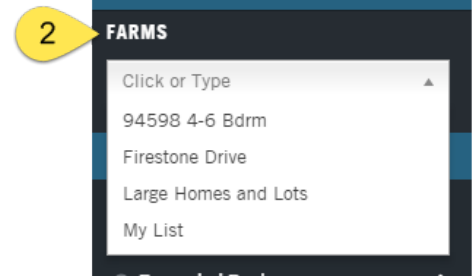
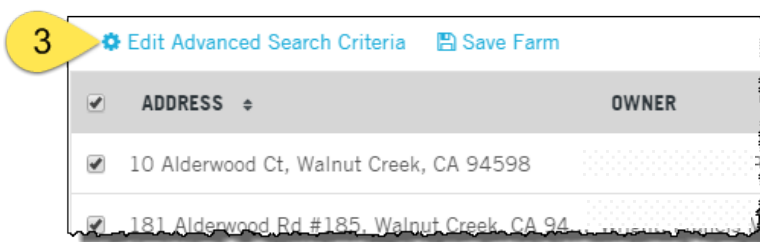
See the Advanced Search guide for a detailed description of the filters.

Managing Farms:

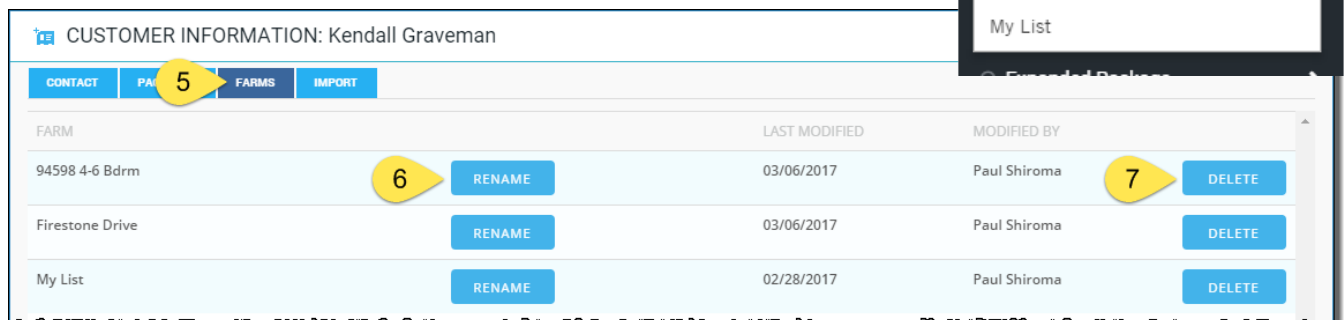
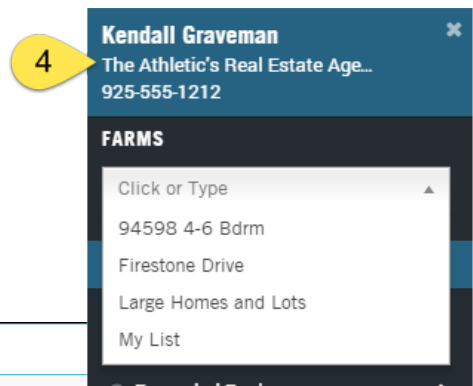
After creating your farm, click the Save Farm button (1) to save the filter criteria for your customer. Once saved, the Farm will become part of the FARMS list for that customer (2).



You can reuse any farm as well as modify the criteria should the client require changes by selecting the farm from the list (2) and clicking Edit Advanced Search Criteria (3).



Renamed or delete a saved farm by clicking on the customer contact card (4) and selecting the Farms tab (5-7).

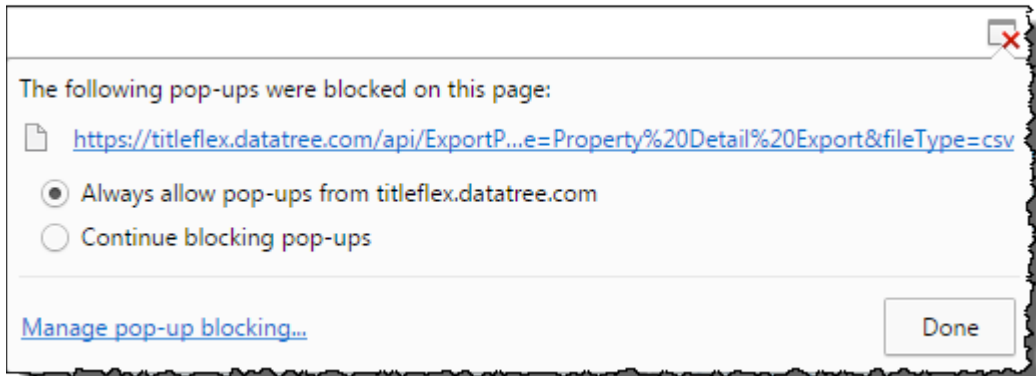


Exports:

The export button bar at the top right hand corner of the results page will provide three outputs for your farm.

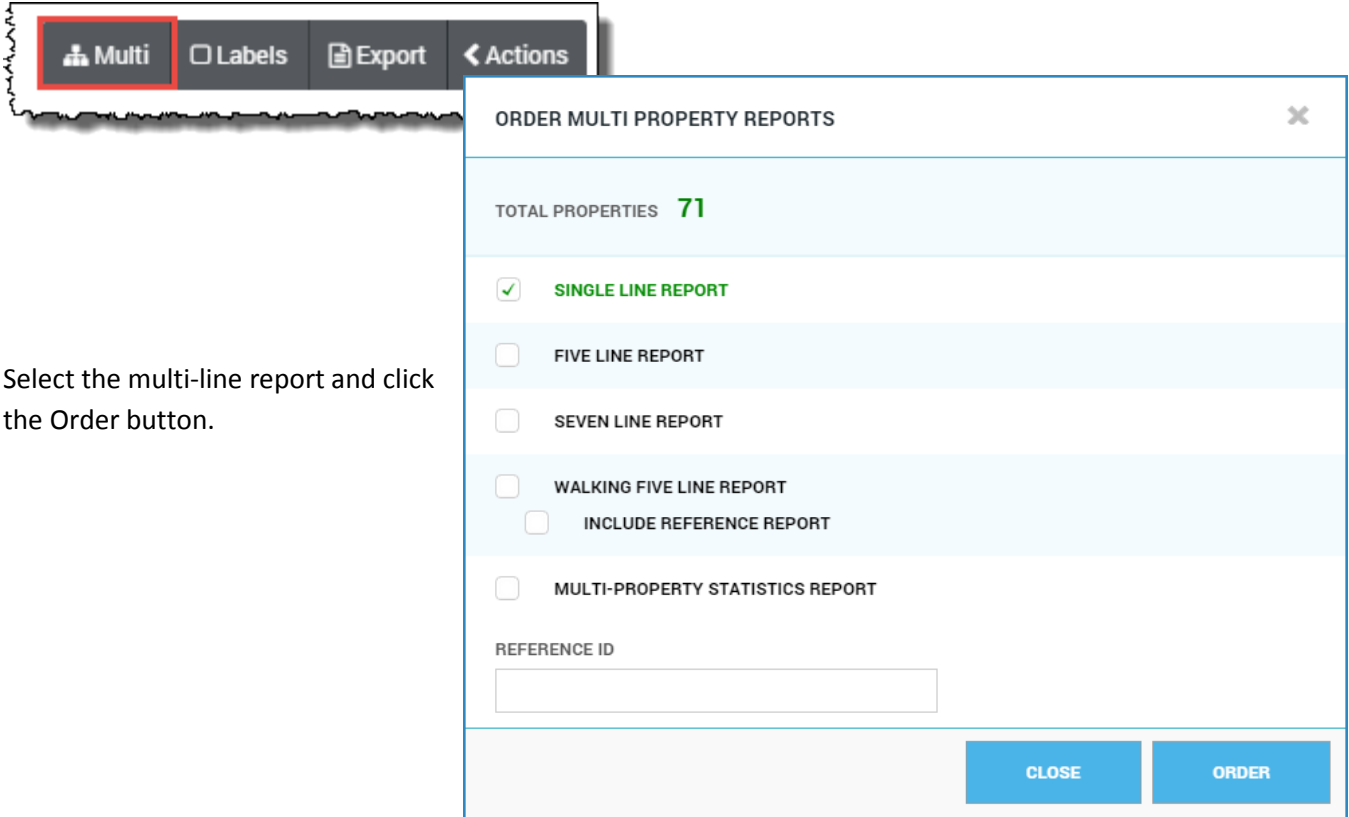


TIP: All exports use a popup window. Please make sure popup blockers are disabled. The screenshot shows Chrome’s alert and how to disable the popup blocker. Other browsers function differently, please check with your desktop support for more information.



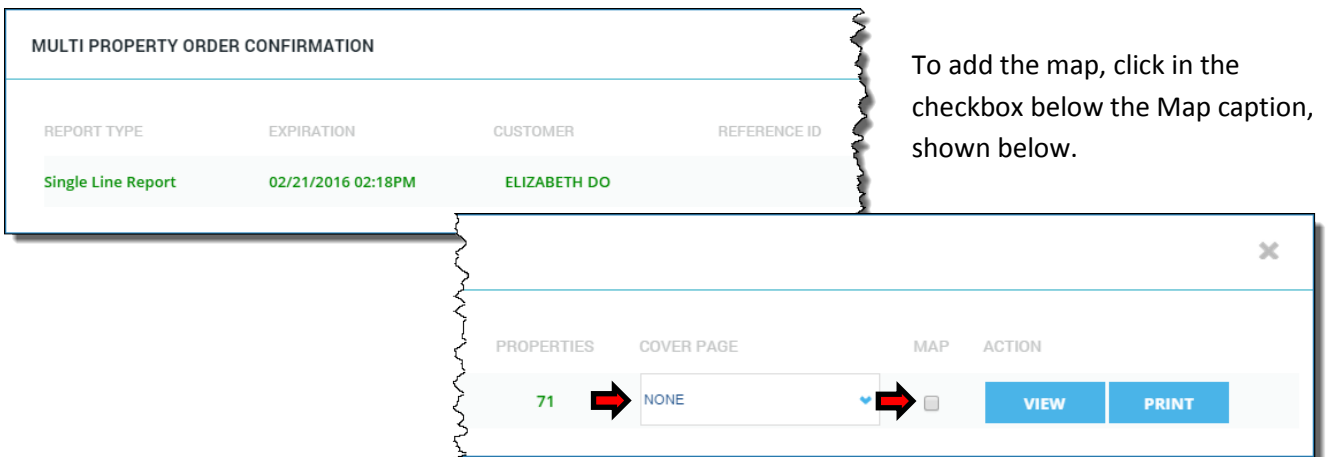
Multiline Reports (Multi):

Turning your list into a multi-line report.



Select the multi-line report and click the Order button.

The Order Confirmation dialog box will appear. In this box, you can add a cover page, as well as the map showing the pins for the user.



To add the map, click in the checkbox below the Map caption, shown below.

Click Print or View to print or view the document.

In the example above, we selected a Single Line report. Below is a sample of the Single Line and Five Line report.

SINGLE LINE REPORT

REFERENCE ID:
COUNTY DATA AS OF: 01/04/2016
NUMBER OF PROPERTIES: 126

PARCEL NUMBER	OWNER NAME	SITE ADDRESS	BD	BA	SQFT	LOT	YB	
1	006-440-39-100	HART PETER G HART ...	610 RIVER RD,	6	3 0	3,120	30,928	1980
2	110-460-85-100	MABOURAKH SHAHRIAR...	3 LAGO DEL REY CT,	7	3 1	5,981		2001
3	110-581-14-100	SEYMOUR DAVID SEYM...	1468 LAKEHILLS DR,	5	3 0	3,105	32,234	1976
4	110-611-11-100	WILLIAMS WADE A SC...	2162 OUTRIGGER DR,	5	3 1	5,047		2005
5	020-041-21-100	ASPEN COVE GENERAL ...	SOUTH LAKE	5	3 0	2,355	52,708	1960
6	022-312-11-100	PERRY-SMITH ROBERT T...						

FIVE LINE REPORT

REFERENCE ID:
COUNTY DATA AS OF: 02/10/2016
NUMBER OF PROPERTIES: 71

1	OWNER NAME	EAST BAY REGIONAL PARK DIST	YEAR BUILT EFF	0
	SITE ADDRESS		LIVING AREA	
	MAIL ADDRESS	PO BOX 5381 , OAKLAND, CA 94605	LOT AREA ACRES	254,408 5.84
	APN	140-401-077-7	BEDROOMS	0
	SALE RECORDING DATE	01/01/1900 06/20/1...	BATHROOMS (F H)	0 0
		LAND USE PARK		
2	OWNER NAME	SAN MARCO HOMEOWNERS ASSN	YEAR BUILT EFF	0
	SITE ADDRESS		LIVING AREA	
	MAIL ADDRESS	1266 SPRINGHILL RD	LOT AREA ACRES	16,661 0.38
	APN	140-361-056-9	BEDROOMS	0
	SALE RECORDING DATE	01/01/1900 11/30/1...	BATHROOMS (F H)	0 0
		LAND USE COMMON AREA		
3	OWNER NAME	SAN MARCO HOMEOWNERS ASSN	YEAR BUILT EFF	0
	SITE ADDRESS		LIVING AREA	
	MAIL ADDRESS	1266 SPRINGHILL RD ,	LOT AREA ACRES	85,995 1.97
	APN	140-361-057-7	BEDROOMS	0
	SALE RECORDING DATE	01/01/1900 11/30/1...	BATHROOMS (F H)	0 0
		LAND USE COMMON AREA		

Labels:

Creating a PDF file for printing Avery labels.



Clicking on the Labels button will open the Order Labels dialog box. You can select which address to mail to, how to print the owner name, do not mail and deduplication options, sort order, and the case (proper or all capitals). Three common Avery labels are included. Make your selections and click Order at the bottom.

ORDER LABELS

TOTAL PROPERTIES
126

ADDRESS FORMAT
 MAILING PROPERTY

OWNER NAME OPTIONS
 LAST, FIRST FIRST, LAST OR CURRENT RESIDENT
 REPLACE OWNER NAME WITH CUSTOMIZED LABEL
Current Resident

DO NOT MAIL
 EXCLUDE REMOVE DUPLICATES

SORT ORDER
 ADDRESS APN

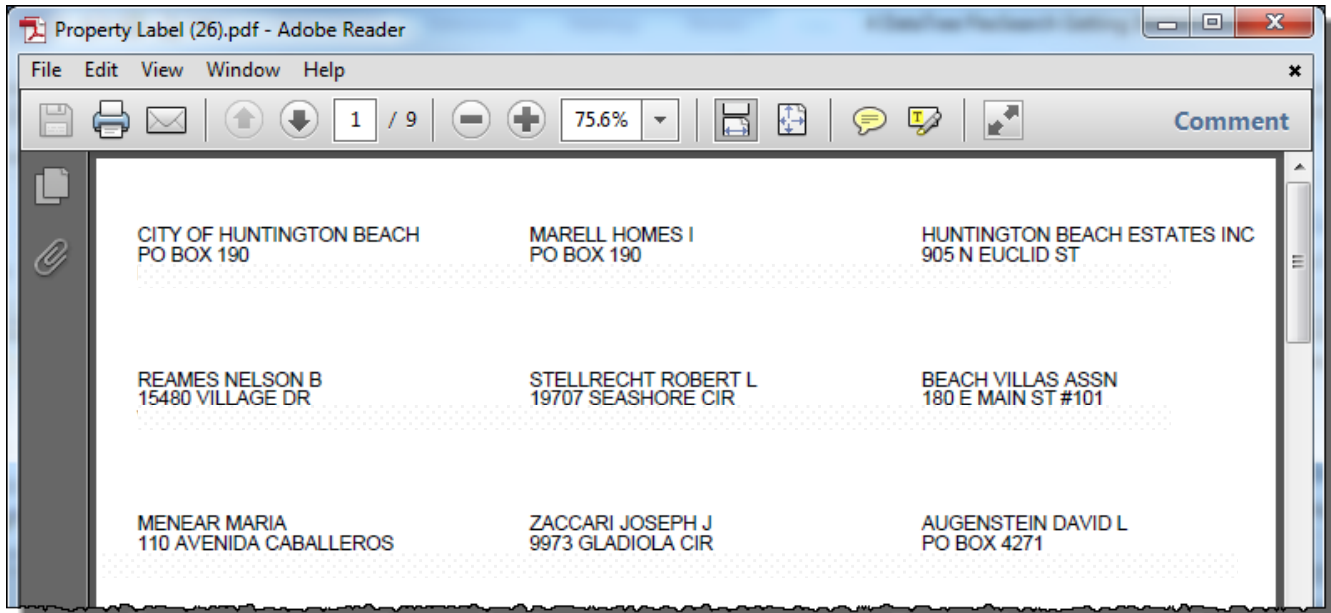
CASE CONVERSION
 ALL CAPITALS UPPER / LOWER

LABEL PREFERENCE
 AVERY 5160 AVERY 5161 AVERY 5162

CANCEL **ORDER**

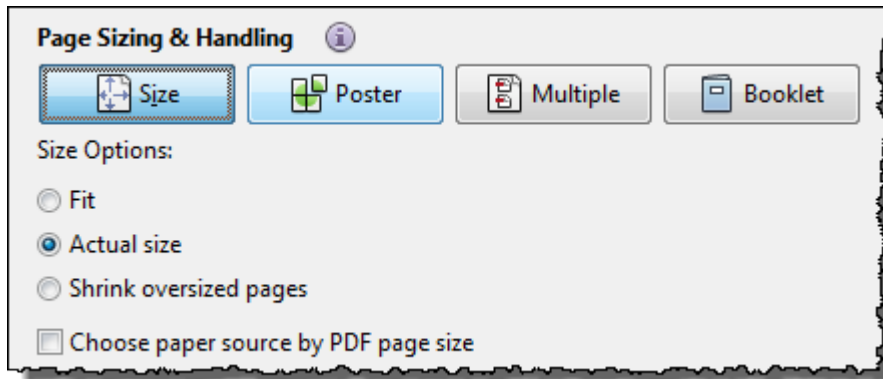
Barbara B Corneille & Corneille Liv Trust Of 3/19/9 or Current Resident	Jonatkim Enterprises or Current Resident 627 S Manchester Ave	Stephen Roy & Terry P Miller or Current Resident 29 Atherton Ave
Tom & Terri Jamieson or Current Resident	John A & Donna J Schneider or Current Resident	Wellington S Henderson & Richard L Greene or Current Resident
Green Banker Ca Llc or Current Resident	Marcia Custodian Giusti & Yolanda Custodian Thompson	Allan Family Ca or Current Resident

Labels Continued: When printing labels, your printer software and hardware will make a difference in how the labels are printed. Save your labels to a convenient location, such as your desktop. From the desktop (or the download location) double-click the pdf to open the labels in Adobe Acrobat.



Click the Print button to open Acrobat’s print dialog box.

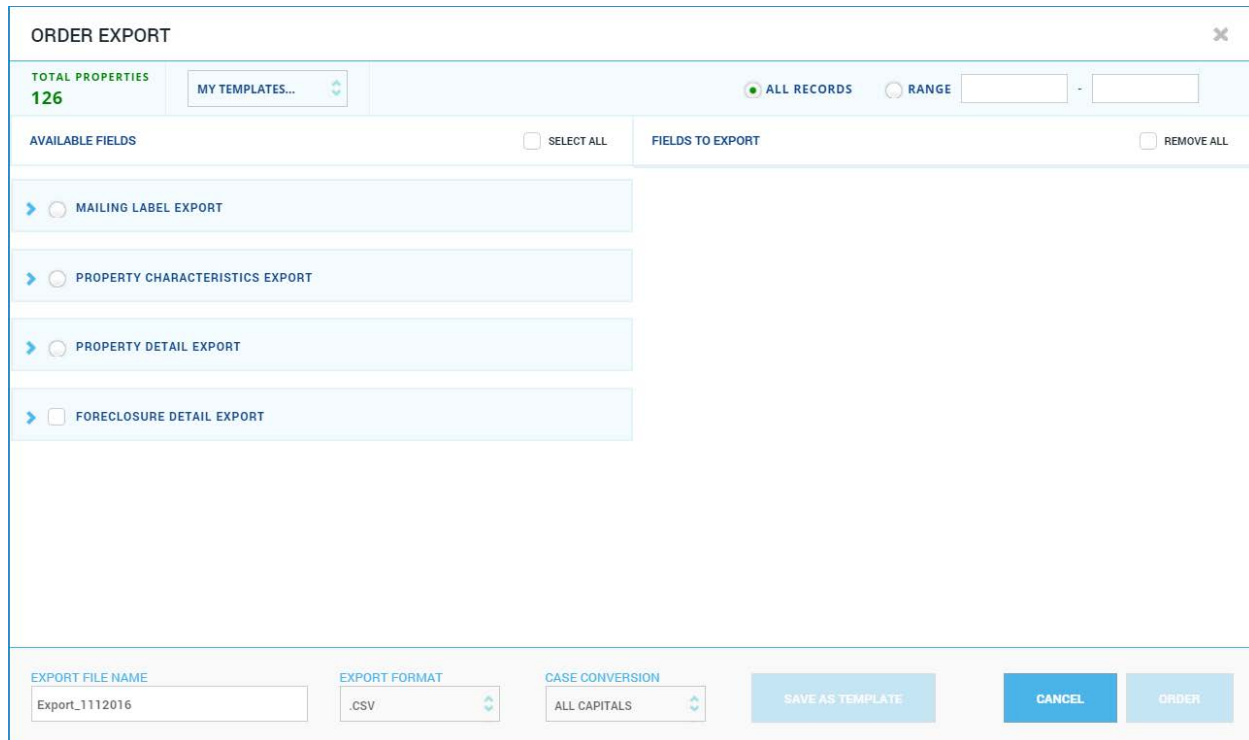
In the Size Options section, select “Actual Size”. This will ensure that the printer’s software does not adjust the labels to its defaults. There will be variations between the printer hardware and the software drivers used. It is recommended that you print on plain paper to test the settings of your printer and printer’s software.



Make any other selections as appropriate and click Print.

Export Options:

Pulling your data into a csv (Excel) file.

The screenshot shows the 'ORDER EXPORT' dialog box. At the top, it says 'TOTAL PROPERTIES 126' and 'MY TEMPLATES...'. There are radio buttons for 'ALL RECORDS' and 'RANGE' with input fields. Below this are two columns: 'AVAILABLE FIELDS' with a 'SELECT ALL' checkbox and 'FIELDS TO EXPORT' with a 'REMOVE ALL' checkbox. The 'AVAILABLE FIELDS' column contains four radio button options: 'MAILING LABEL EXPORT', 'PROPERTY CHARACTERISTICS EXPORT', 'PROPERTY DETAIL EXPORT', and 'FORECLOSURE DETAIL EXPORT'. At the bottom, there are three dropdown menus: 'EXPORT FILE NAME' (set to 'Export_1112016'), 'EXPORT FORMAT' (set to '.CSV'), and 'CASE CONVERSION' (set to 'ALL CAPITALS'). To the right of these are three buttons: 'SAVE AS TEMPLATE', 'CANCEL', and 'ORDER'.

Four export options are available.

Mailing Label: This includes the essential fields necessary to create mailing labels through a mail merge, such as in Microsoft Word.

Property Characteristics: Includes all fields from the Mailing Label export and adds the fields with the Property Characteristics. See the Property Characteristics, Location Information, and the Tax Sections of the Property Detail report for the fields.

Property Detail: This export contains every field on the Property Detail Report. Essentially, includes everything in the first two options plus the balance of the fields from the Property Detail Report. As each of the first three lists builds on the previous, there is no need to select more than one.

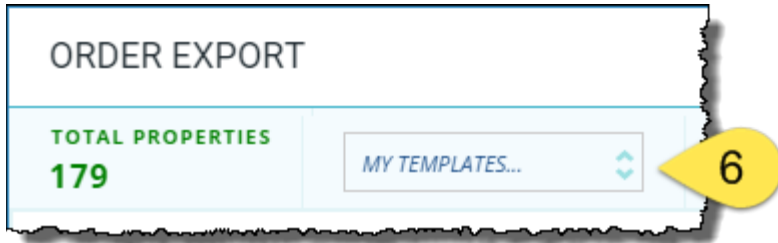
Foreclosure Detail: Does not contain address information - only foreclosure information. One of the above exports must be included if you need address, owner, or property characteristics information.

Click on any radio button to view the available fields. You may select fields individually or click Select All to use all the fields in the export.

Once you have selected the appropriate fields, enter a file name (1), select an export format (2), and change the case (all capitals or upper and lower) (3). If this is a standardized setup click Save as Template (4) to keep these selections for reuse later. Finally, click Order (5).



Templates can be recalled from the drop down list (6) at the top left hand corner of the Order Export dialog box.



TIP: Chrome, Firefox and Internet Explorer all download files slightly differently. Please make sure to take note of where your browser saves downloaded files. If you are unsure, check with your IT team or Helpdesk or call DataTree Client Services at 800-708-8463.

Additional how-to guides on farming can be found in the TitleFlex User Guides on the Help and Support page.