



TitleFlex
by Data Trace

DOCUMENT RETRIEVAL

Rev. 201704

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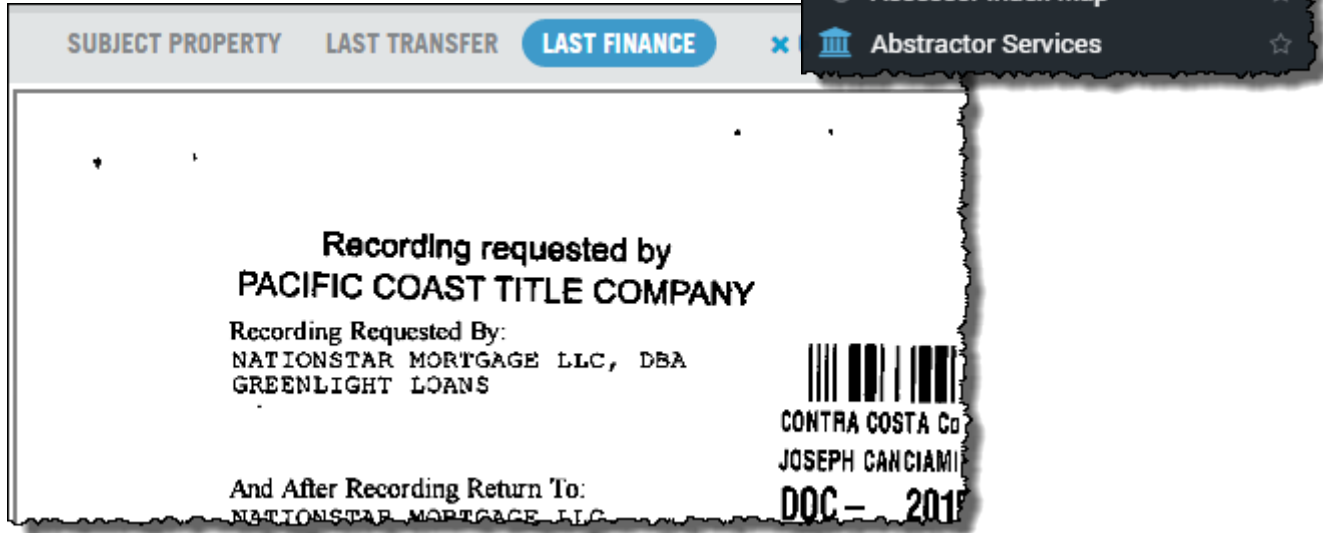
Overview

TitleFlex offers several options for retrieving documents. Depending upon your needs, you can access the Last Transfer and Finance document, order documents by document number, or through reports.

Last Transfer & Last Finance:

After locating the subject property and selecting a customer, if necessary, open the Document Images section of the Available Reports panel. Make your selection and click Order.

Documents will open in a button to the right of the Subject Property Tab.

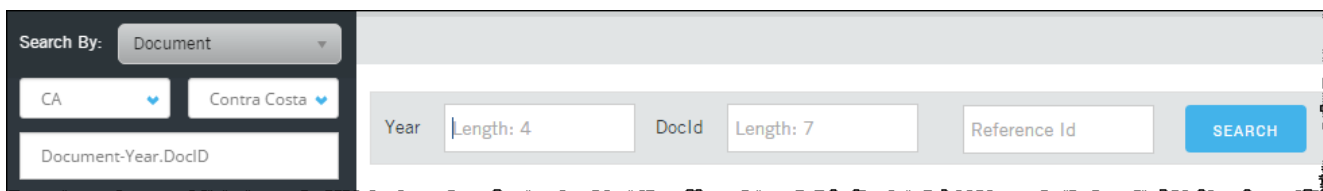
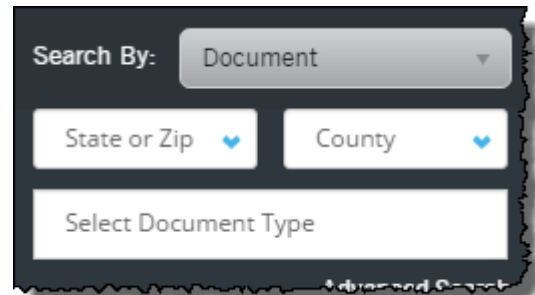


Document Search:

If you have the state, county, and document number, use the Document Search feature in the search bar. Select the State, county and document type.

The Search Panel will open. Enter the document number and click Search Documents

A state and county selection is mandatory.





Through Reports:

Reports, such as the Property Detail and Transaction History, have the ability to order documents.

In the Property Detail report, you can click Order next to the document. The courthouse icon (1) is for the abstractor service.

In reports such as the Transaction History, as well as others, select the document by clicking in the checkbox next to the document and click Order Selected.











1st Mtg Doc #:	N/A
	 
Transfer Doc #:	1989.166645
	ORDER

<input type="checkbox"/>	06/08/1992	Refinance	\$42,000		Avco Financial Svcs So Califor
<input type="checkbox"/>	04/19/1990	Refinance	\$23,000		Avco Financial Svcs So Califor
<input type="checkbox"/>	08/29/1989	Resale	\$80,000		Glendale Federal Bank

[ORDER](#)

Abstractor Services:

In the event that a document is unavailable, the Abstractor Service allows you to order documents via a manual search of county records. Click on the Abstractor button in the Document Images section (2) or on the Courthouse icon in any report (2) and complete the information.

Document Images 	<input type="checkbox"/>	08/29/1989	Sale	\$202,500
<input type="radio"/> Last Transfer Document 		08/29/1989	Finance	\$80,000
<input type="radio"/> Last Finance Document 	<input type="checkbox"/>	08/10/1988	Sale	\$176,500
<input type="radio"/> Assessor Map 		08/10/1988	Finance	\$159,000
<input type="radio"/> Assessor Index Map 				
  Abstractor Services 				

If the document is found, it will be returned to you in the Order Portal > View All Orders tab.



As mentioned above, there are two methods to access the Abstractor Service. This is the form that will appear. Fields highlighted in red are mandatory.

ABSTRACTOR SERVICES [Close]

A SINGLE SOLUTION FOR ALL YOUR DOCUMENT RETRIEVAL NEEDS.

In addition to offering the most extensive data and image repository in the nation, we provide you with a nationwide network of document abstractors. This cost-effective, comprehensive solution enables you to request the retrieval of any property record across the nation including mortgages, deeds, assignments, transfers, releases, foreclosures and more.

SELECT DOCUMENTS **1**

- MORTGAGE
- LATEST MORTGAGE
- MODIFICATION
- ASSIGNMENT
- RELEASE
- NOTICE OF DEFAULT
- NOTICE OF TRUSTEE SALE
- NY CEMA DOCUMENT
- NY CEMA FULL CHAIN
- MORTGAGE & ALL RELATED DOCUMENTS
- GRANT/WARRANTY DEED
- LAST VESTING DEED
- QUIT CLAIM DEED
- UCC
- UCC & DOWNSTREAM FILINGS
- POWER OF ATTORNEY

OPTIONS **2**

- FULL DOCUMENTS
- CERTIFIED COPY REQUEST
- PERTINENT PAGES ONLY **3**

DOCUMENT ID **COUNTY**

STREET ADDRESS

CITY **STATE** **ZIP**

REFERENCE

Note: If the mortgage amount and date are not an exact match, we will provide a copy of the applicable document that is within 30 days prior and 180 days after the recording date and within \$5,000 of the mortgage amount. **5**

CANCEL **SUBMIT**

The form is divided into four sections:

Select Document (1):

SELECT DOCUMENTS

- MORTGAGE
- LATEST MORTGAGE
- MODIFICATION
- ASSIGNMENT
- RELEASE
- NOTICE OF DEFAULT
- NOTICE OF TRUSTEE SALE
- NY CEMA DOCUMENT
- NY CEMA FULL CHAIN
- MORTGAGE & ALL RELATED DOCUMENTS
- GRANT/WARRANTY DEED
- LAST VESTING DEED
- QUIT CLAIM DEED
- UCC
- UCC & DOWNSTREAM FILINGS
- POWER OF ATTORNEY

Document Options (2 and 3):

Pertinent Pages is only available for Mortgages and CEMAs.

OPTIONS

- FULL DOCUMENTS
- CERTIFIED COPY REQUEST
- PERTINENT PAGES ONLY

Address, Owner, and Document Information (4):

This screenshot shows the default form view. It includes the following fields:

- DOCUMENT ID
- COUNTY
- STREET ADDRESS
- CITY
- STATE (dropdown menu)
- ZIP
- REFERENCE

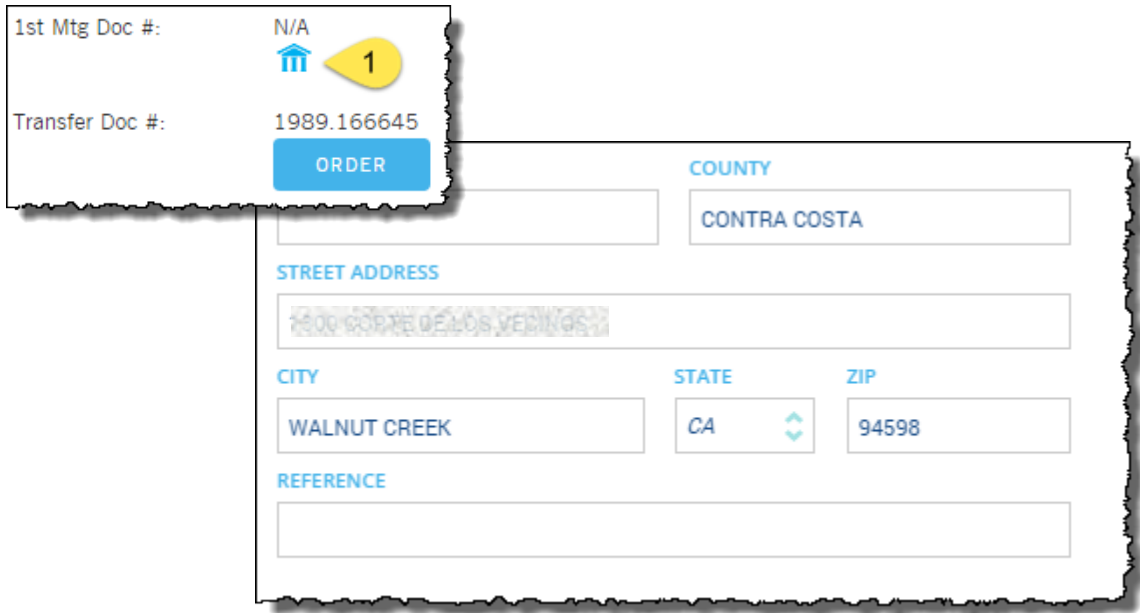
As shown, this is the default view where a document type has yet to be selected. This section will change and include additional form fields once the document type has been chosen.

This screenshot shows the form view for the Assignment document option. It includes the following fields:

- DOCUMENT ID
- COUNTY
- STREET ADDRESS
- CITY
- STATE (dropdown menu)
- ZIP
- REFERENCE
- DOCUMENT DATE (calendar icon)
- DOCUMENT RECORDING DATE (calendar icon)
- ORIGINAL MORTGAGE DATE (calendar icon)
- ORIG. MORTGAGE RECORDING DATE (calendar icon)
- BORROWER NAME (FIRST & LAST OR COMPANY/TRUST)
- ORIGINAL MORTGAGE AMOUNT
- ORIGINAL LENDER NAME
- TRANSFER DATE (calendar icon)
- GRANTOR
- GRANTEE
- LENDER NAME ON DOCUMENT
- ASSIGNOR
- ASSIGNEE

As example, these are the fields for the Assignment document option:

If you have selected the Abstractor Service via a report, as shown here (1), the abstractor service form will have the added benefit of pre-populating the address fields.



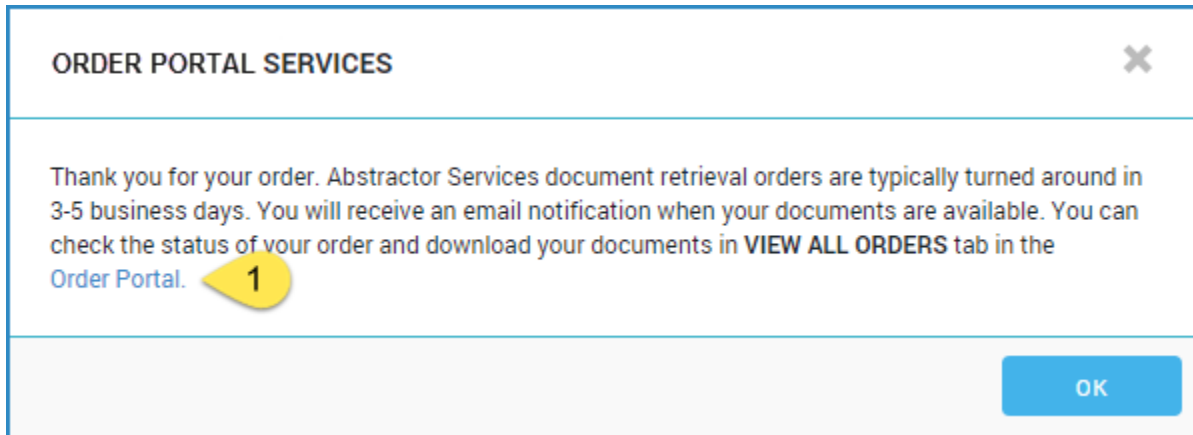
The screenshot shows a form for Abstractor Services. A callout box with a yellow circle containing the number '1' points to a blue 'ORDER' button. The form fields are as follows:

1st Mtg Doc #:	N/A	
Transfer Doc #:	1989.166645	
<input type="text"/>		
COUNTY	CONTRA COSTA	
STREET ADDRESS		
<input type="text" value="1400 CORTEJO DE LOS VERDEJOS"/>		
CITY	STATE	ZIP
WALNUT CREEK	CA	94598
REFERENCE		
<input type="text"/>		

All other functionality remains the same.

Submitting Your Order and Checking Status:

Upon submission of an Abstractor Services order, a confirmation message will display.



The dialog box is titled 'ORDER PORTAL SERVICES' and contains the following text:

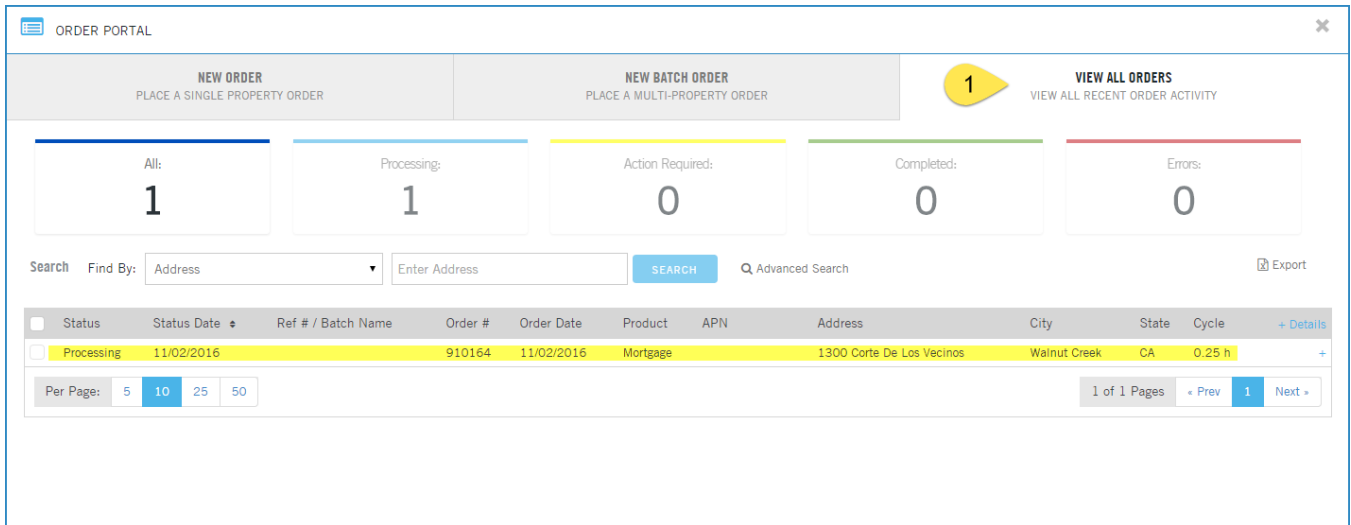
Thank you for your order. Abstractor Services document retrieval orders are typically turned around in 3-5 business days. You will receive an email notification when your documents are available. You can check the status of your order and download your documents in [VIEW ALL ORDERS](#) tab in the Order Portal.

A yellow callout circle with the number '1' points to the 'VIEW ALL ORDERS' link. An 'OK' button is located at the bottom right of the dialog.

Click the link (1) in the dialog box to open the Order Portal or go click the Order Portal option (2) in the navigation bar.

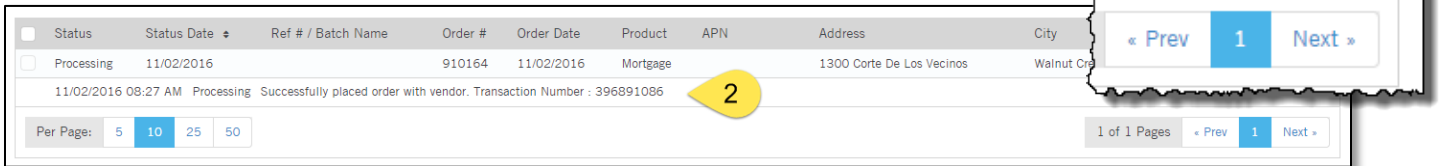


Users can check the status of their order and download retrieved documents in Recent Activity dialog box

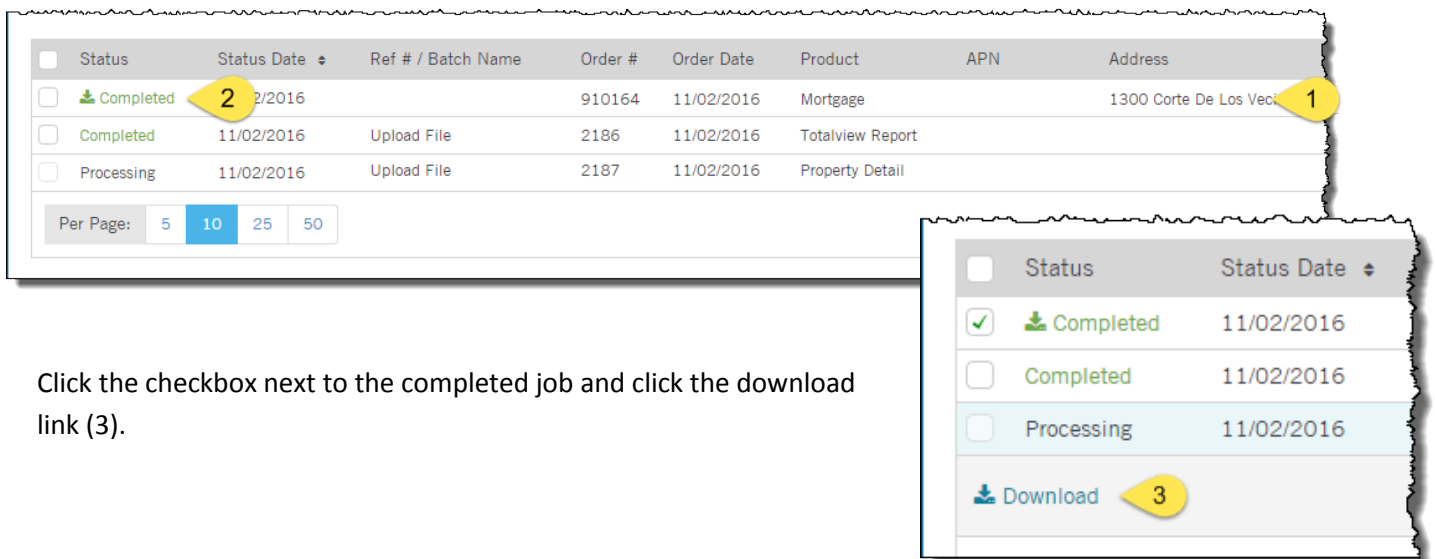


Note that the View All Orders dashboard will report on all requests for abstractor orders that are in process or have completed. The Order Portal will remove documents after 12 months.

Clicking the Details link at the far right hand side of the record list in the Dashboard will open the processing details for that order.



When the job (1) is completed and the document retrieved, the dashboard will update with a "Completed" (2) status.



Click the checkbox next to the completed job and click the download link (3).