

Innovations to GO BEYOND
TITLE DATA and AUTOMATION

USER GUIDE

Rev. 201904

Overview

Welcome

TitleFlex is your single source for real estate research, farming, property profile generation and customer service– that helps you serve customers quickly and build continued loyalty. With innovative search tools and advanced technology, TitleFlex provides the tools required to deliver superior customer service.

Getting Started

This User Guide will provide you with some basic steps for getting started quickly.



Additional eLearning and support content can be [found here](#).

For more information, you may use the Live Chat feature for immediate assistance.

System Requirements

Web Browsers

Google Chrome, Mozilla FireFox and Internet Explorer 10 are required. Here is a summary of recommended settings for your browsers. For additional information on setting up your browser, [click here](#).

Trusted Site:

Typically, it is recommended that you set DataTree as a trusted site in the browser's internet options

Browser Cache:

Set your browser's cache to be deleted each time you close the browser.

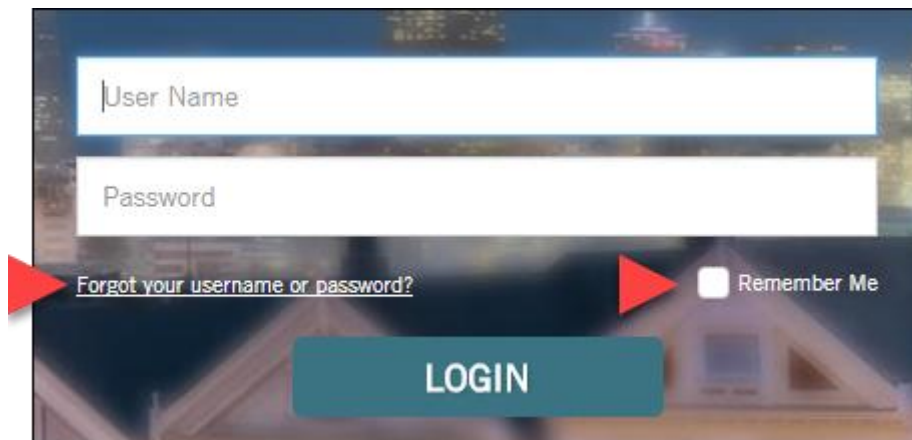
Pop Up Blocking

The viewing of reports may be blocked by your browser's settings. Be sure to disable popup blockers to gain full access to DataTree's many features. This will be particularly important to labels, exports, printing and saving features.

Heading out with TitleFlex

Logging In

Open your web browser and go to <https://titleflex.datatree.com> and press enter. Input your Username and Password (provided by your company administrator) and click Login.



Customer Agreement

If this is your first time logging in, you may be prompted to read and accept the Data Trace License agreement. Please read, enter your initials and hit the "I Accept" button to proceed.

For questions about this agreement, please contact Client Services at 800-708-8463.

Customer Agreement

END USER LICENSE AGREEMENT

This End User License Agreement ("Agreement") accompanies the information, data, images, reports, and/or software (the "Services") that you are accessing. By accessing the Services, you are agreeing to all the terms and conditions of this agreement, including the product, pricing and billing information in any order confirmation containing account information received at any time ("Order Confirmation"), the terms of which are incorporated into this Agreement by reference. Data Trace Information Services LLC, a Delaware limited liability company ("Data Trace"), grants you ("Customer") a limited, non-exclusive, non-transferable license to use the Services, provided you accept the following terms and conditions:

1. Property. The Services and all intellectual property rights therein are owned by Data Trace and/or its affiliates. No ownership rights are granted by this Agreement and, except for the limited license provided, Data Trace reserves all rights in and to the Services and all underlying data compilations and information contained therein, including but not limited to the exclusive intellectual property rights and the right to grant further licenses. Customer acknowledges that the Services are the proprietary property of Data Trace and are a valuable commercial product, the development of which involved an expenditure of substantial resources by Data Trace.

2. Permitted Use. The Services are solely for use within Customer's own organization by Customer and its employees for Customer's own internal business purposes of verifying property ownership and information. Customer shall not resell, relicense or redistribute the Services in whole or in part except as permitted immediately below.

With respect to TitleFlex Services only, Customer may provide TitleFlex Services or Customer's employees incorporating TitleFlex Services, to real estate agents, real estate brokers, escrow companies, lenders, title companies, and title agents solely for creating property marketing collateral for buyers of real property or for internal business purposes of conducting research regarding property.

Overview:

The main home page includes three primary sections:

1. The left hand panel provides search options. Once the property has been found, reports and documents can be ordered.

2. The center panel is where reports and documents will load. It also includes the Recent Activities sections where recent searches and saved reports, documents, or farms can be recalled and re-run.

3. The right hand panel includes the interactive map. This is a “live” map and parcels can be selected by clicking on them. Additional overlays are included for more functionality.

TitleFlex HOME SAVED SEARCHES CUSTOMER CENTER ORDER PORTAL FLEXSEARCH ADMIN PAUL SHIROMA

Search By: Address
Street Address and City/State or Zip
Advanced Search

Company Packages >
Property Data Reports >
Document Images >
Automated Valuations >
Fraud & Verification >
MarketWatch

Reference ID
Order

RECENT ACTIVITY

PROPERTY SEARCHES

Address	Owner	APN	Action
223 S Globe St, Flagstaff, A...	Kahl David	100-35-012C	View

DOCUMENT IMAGES >

DATA EXPORT & LABELS

Order Type	File Name	Created	Properties	Expiration	Action
Labels	Avery 5160	04/15/2019	14	05/15/2019	Download

MULTI PROPERTY REPORTS >

SAVED SEARCHES

Name	Date Searched	Count	Expiration	Action
94598 Homes	04/09/2019	43	07/08/2019	View
PACE Liens	04/09/2019	100	07/08/2019	View
HOA Liens	04/09/2019	100	07/08/2019	View

ORDER PORTAL NOTIFICATIONS

RECENT ORDER ACTIVITY

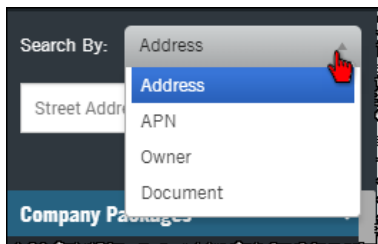
Here's a recap of your recent order activity on the TitleFlex Order Portal.

All:	Processing:	Action Required:	Ready:	Completed:	Errors:
1	0	0	0	1	0

Go to the [View All Orders](#) tab in the [Order Portal](#) to download your Ready orders and to address any orders that are in Action Required or Error status.

Map On ☒
< More Map

3D
Road



Choose Your Property Search Preference

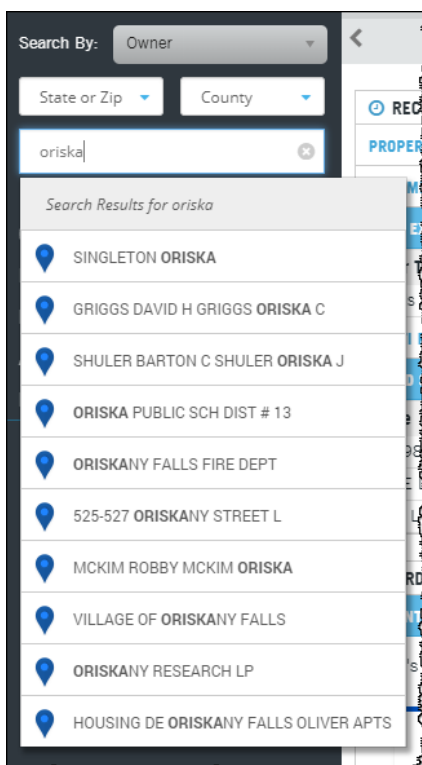
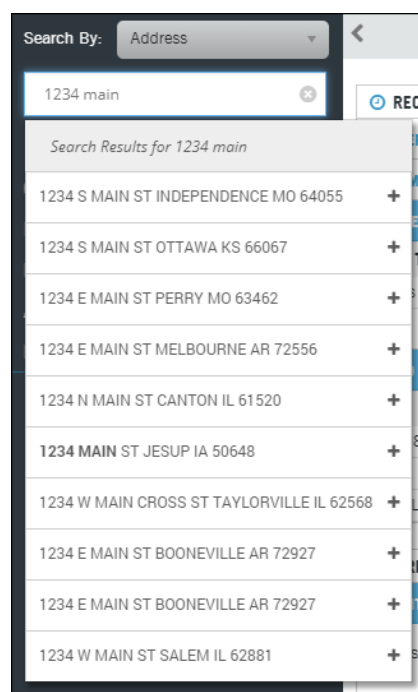
Address and Owners searches, by default, operate nationwide. State and County filters are optional.

APN and Document searches require a State and County as each jurisdiction uniquely codes APNs and documents.

Nationwide Search Options:

Address Search (Right)

Automatically searches nationwide and provides suggestions as you type. Enter any address, partial or otherwise, with or without commas. The type-ahead feature will suggest results as you type. Continue to type or click on the suggested property address to view the result.



Owner Search (Left)

Users can query a property by a name. The type-ahead feature will provide suggestions of both business and residential owner names.

Click on a name to view the associated parcels (a list of parcels may be provided).

Searches That Require State and County:

APN Search

Search By: APN

AZ Maricopa

123

Search Results for 123

123-01-001D	+
123-01-001E	+
123-01-003	+
123-01-004	
123-01-005	
123-02-001-D	
123-02-001-F	
123-05-001-V	
123-06-004C	+
123-06-004D	+

The State and County must be provided. The APN can be entered with or without dashes. Click on the suggested APN or continue typing to narrow the suggestions offered by the type-ahead feature.

Pressing Enter with a partial APN, as shown here, will return a list of matching records, potentially very large, which will require additional filtering.

Search By: APN

AZ Maricopa

123

Advanced Search

- Company Packages
- Property Data Reports
- Document Images

SEARCH RESULTS Clear Search

6,836 results found (6836 selected)

Edit Advanced Search Criteria Save Search

VIEW ALL RESULTS

Your search returned too many results to display on the map.

Document Search

Search By: Document

CA Contra Costa

Select Document Type

- Assessment Map - Book.Page
- Assessor Map
- Document - Book.Page
- Document - Year.DocID
- Parcel Map - Book.Page
- Record Map - Book.Page
- Tract Map - Book.Page

Select the state and county and the available Document Type format will then appear, allowing the user to request a recorded Instrument document.

Search By: Document

CA Contra Costa

Document - Year.DocID

1960.1 to 2019.53340

Year - Length: 4

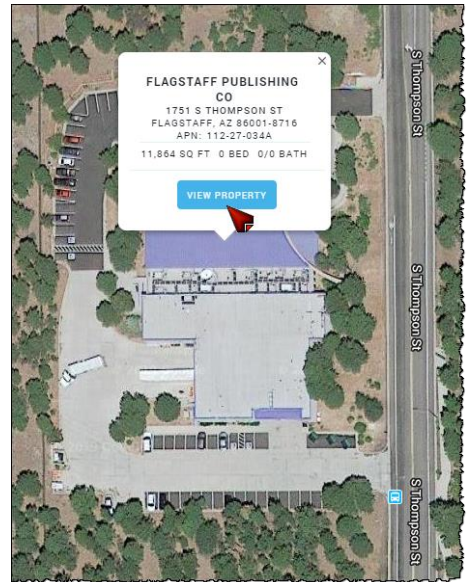
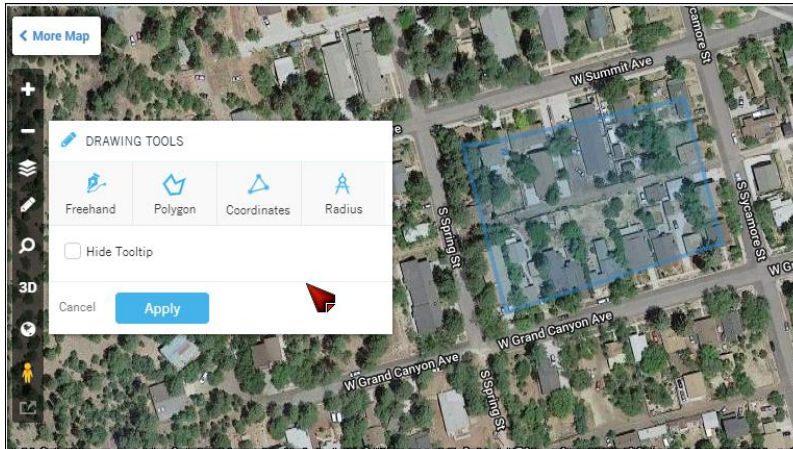
DocID - Length: 7

Search by Document #

Interactive Map Search

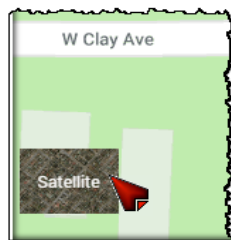
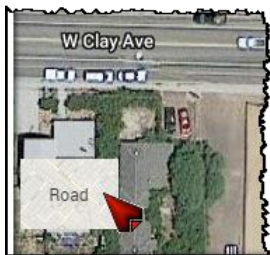
Users can identify, select and de-select properties directly on the map simply by double-clicking on the property or by clicking View Property in the property information pop-out (upper right).

Multiple properties can be selected at once by using the Drawing Tools to define an area on the map. Any property that is touched by or falls within the area defined by your drawing tool will be selected. This is a primary method for building farms. Mailing labels, export files or multi-property reports can be generated from this list (below).

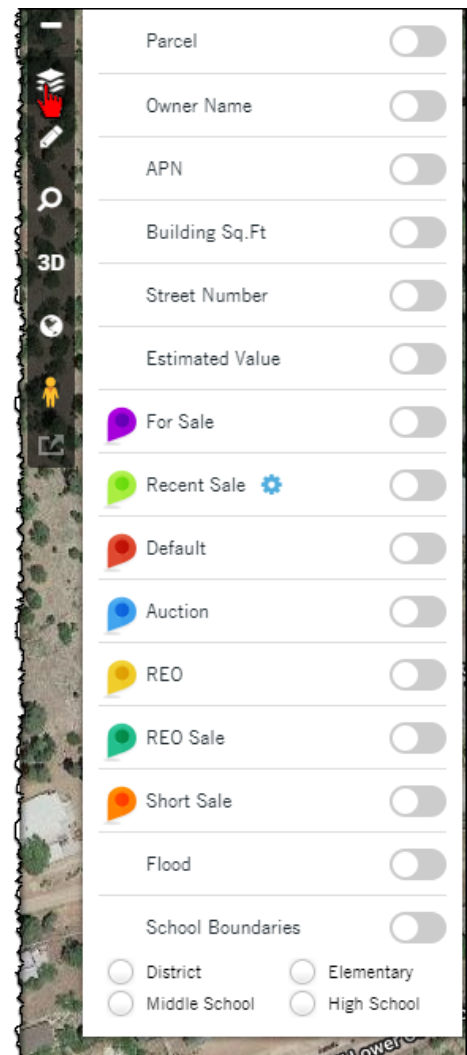


The map also includes flags and layers to provide additional information, such as distressed status, parcel boundaries, APNs and much, much more. Click on the toggle switch to the right of each option to activate that feature on the map (lower right).

The map view can also be changed to roads or satellite views.



For more information on using the map tools see the Farming section of the User Guides.



Search Functionality and Report Features

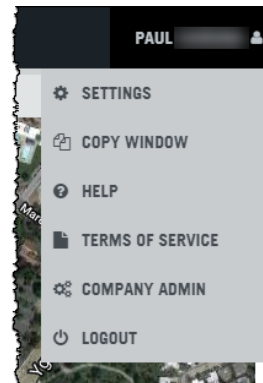
Copy Window

This allows users to conduct an unlimited number of property searches in parallel without having to complete or exit searches that have been previously started by opening additional tabs in your browser and allowing you to run multiple simultaneous independent searches.

Verified Records

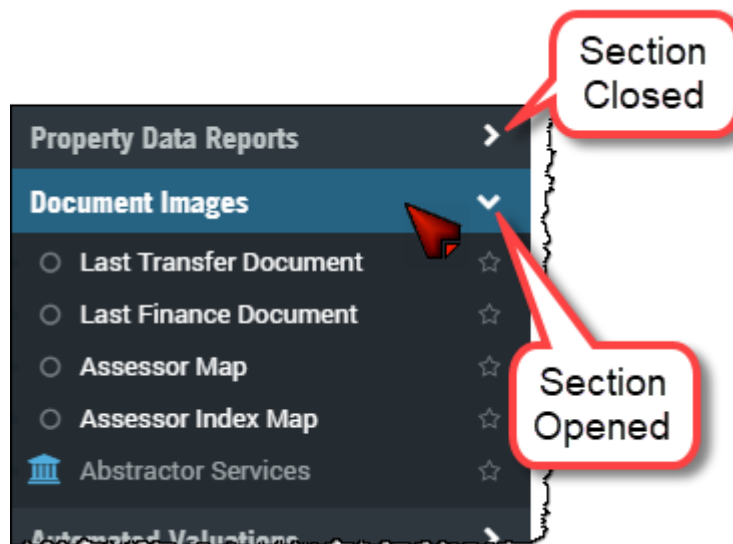
In the reports, you may see a Verified Records icon. This indicates that a transaction was digitally checked across multiple independent resources and, when a match is found from at least two independent sources, it is marked with a “Verified” icon. This will save customers time and money by minimizing their own independent verification processes.

CONVEYANCES				
<input type="checkbox"/>	Date	Rec Date	Verified	Price
<input type="checkbox"/>	01/07/2005	01/14/2005	✓	\$174,500



Available Reports

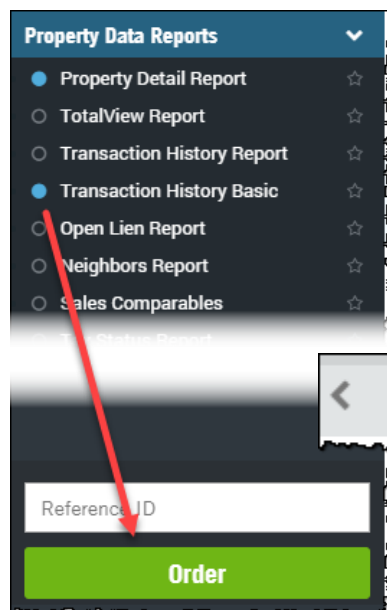
Reports and documents are found at the right hand side of the application and can be ordered after a property has been selected. The reports are grouped into categories – Property, Document Images, and Valuation Reports – and the section can be opened by clicking on the group header.



Note: Your available reports may vary dependent upon your contract so not all the reports shown below will be available.

Managing Reports and Documents

Once a property is selected using Property, APN, or Owner search, TitleFlex will load the Subject Property Tab containing a summary of the property. A property must be selected before a report can be ordered.



Ordering Reports and Documents

After locating a property, select the desired report by clicking the checkbox and clicking Order at the bottom right hand corner of the application.

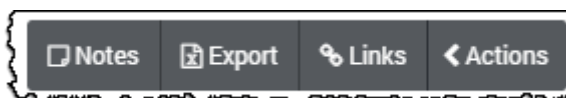
Reports will load to the right of the subject property tab. Click on the report tab to view that particular report.



The Action Bar

Depending on whether the Subject Property tab or a Report tab is in focus, the Action Bar will contain slightly different options.

Action Bar Features Available on the Subject Property Tab:



Exporting Records

If you have selected a list of properties using the drawing tools or advanced filters (see below), you can generate a multi-property report, print mailing labels, or simply export the list into Excel.

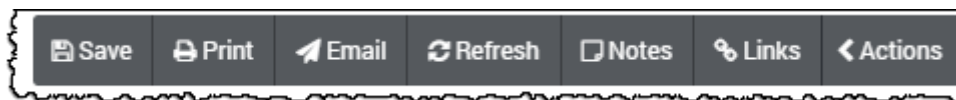
Links

You can also search Zillow, Trulia, and Realtor.com to see if the property you selected is currently listed for sale. Selecting one of these links will launch the real estate site and search for the subject property. The site will load in a separate browser tab so you do not lose your work in TitleFlex.

Notes:

Allows the user to add personal or shared notes about a property.

Action Bar Features Available on Report Tabs:



Save

The save feature will allow you to download your reports or documents ordered for a property. The file will be saved as a pdf and includes options on which reports or documents to save, whether or not to include a cover page and the map.

Print

Sends selected reports or documents to your printer. Includes options for printing a cover page and the map.

Email

Will email selected reports or document, again with options for a cover page and the map, to a recipient with a custom message. The reports and documents are attached as a pdf file.

Refresh

Re-orders the currently displayed report or document.

Reference ID Field

The Reference ID is a free-text field allowing the user to enter an identifier so you can find the ordered reports for this subject property on the monthly TitleFlex invoice. This will allow you to identify reports on the monthly TitleFlex invoice so you can bill out work to a specific client, if required.

A form element with a white input field labeled 'Reference ID' and a green button labeled 'Order' below it.

Filters

Use the Filters to create highly customized lists of properties for farming lists and mailing labels. This is a brief overview. For more information on creating farms using the filters and the interactive map, see the various Farming Guides.

Before using the Filters, keep in mind two primary search criteria:

- **WHERE** are you searching?
- **WHAT** are you searching for?

Keeping these two questions in mind will allow you to navigate through the filter sections with relative ease. Some of the more commonly used sections include:

Location

The Location tab describes **WHERE** you want to search for properties. It includes filters for states, counties, cities, ZIP codes, tracts and much more. You can also setup a proximity search to locate properties near a specific address.

The following tabs describe **WHAT** you are looking for.

Characteristics

The Characteristics tab allow you to identify specific property characteristics, such as the land use, square footage, number of bedrooms, bathrooms, or total rooms, year build, presence of a pool and more.

Transaction

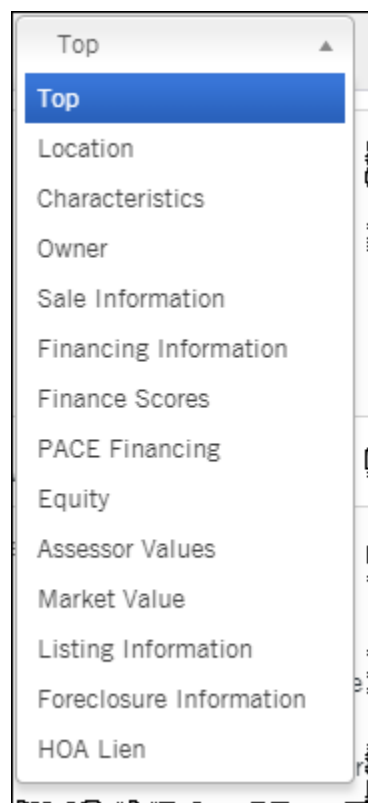
The Transaction tab includes filters for Sales, Mortgage and Listing information.

Distressed

Investors, looking for distressed properties, will find this tab useful as it will filter for properties in different stages of the foreclosure process.

Owner

Finally, the Owner tab allows filtering by name, mailing address, Do Not Mail flag, occupancy and more.

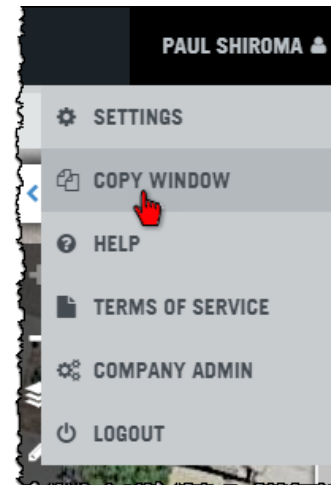


Workflow Tips

Running Multiple Searches in TitleFlex

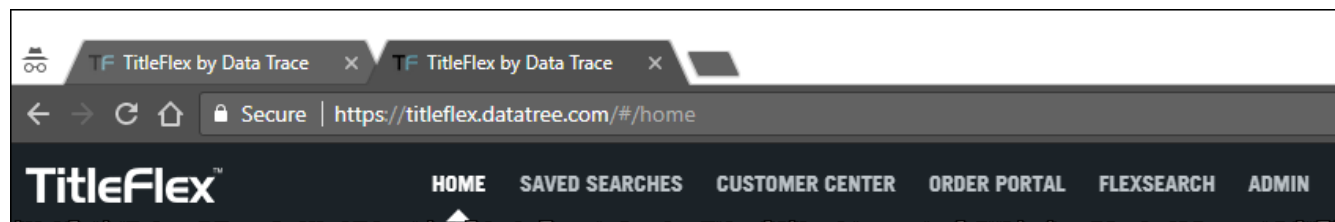
During times when the workload is high and multiple properties and owners are being researched, TitleFlex allows you to have multiple instances open and run different searches in each browser tab.

To use this feature, click the Profile Menu and click Copy Window.



This will open another tab in your browser and keep you logged in. In the new window, click the CLEAR button to start a fresh search.

You now have two (or three or four) TitleFlex tabs from which to perform independent searches.



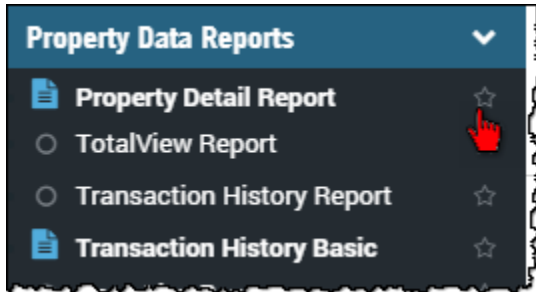
Your original browser tab will retain the search you were working on, while your new tab will have the next search you are working on.

You can have as many tabs open as necessary. Finally, all your work will be retained in the Recent Activities feature of TitleFlex.

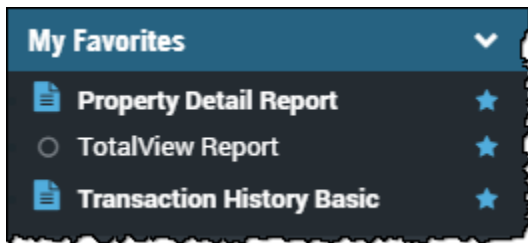
Keeping Favorite Reports

If there are specific reports you use all the time, you can create favorites list that will keep your reports at the top of the list.

To setup a Favorites list, simply click the star to the right of the report.



This will add it to the top of the Panel in a new My Favorites section.



To remove them, simply click the star again.

One-Time Field Edit: Property Detail Report

There may be times when County Assessor records surrounding a property’s characteristics might be slightly different from what is currently on the property. In cases such as this, where your records need to contain current information, TitleFlex provides the ability to do a non-permanent update to property characteristics which can be printed or saved in the PDF report for your business records.

The Property Detail Report provides the option to update selected information specific to these sections of the report:

Owner Information
Owner Name: 1 Fitzgerald
Vesting:
Mailing Address: 2 5202 Rose Canyon

Property Characteristics 3

Gross Living Area:	2,452 Sq. Ft.	Total Rooms:	8	Year Built / Eff:	2010
Living Area:	2,452 Sq. Ft.	Bedrooms:	4	Stories:	
Total Adj. Area:		Baths (F / H):	3 /	Parking Type:	Garage
Above Grade:		Pool:		Garage #:	2
Basement Area:		Fireplace:		Garage Area:	450 Sq. Ft.
Style:	H-Shape	Cooling:	Central	Porch Type:	
Foundation:		Heating:	Central	Patio Type:	
Quality:	Average	Exterior Wall:		Roof Type:	Shingle
Condition:	Average	Construction Type:	Wood	Roof Material:	Shingle

To make these updates, click the Edit icon at the top of the report.

Property Detail Report  1
5202 Rose Canyon Ct, Rancho Cordova, CA 95742
APN: 067-0730-101-0000

NOTE: If you do not see this icon, contact your company’s local administrator as this is an administrator-defined permission.

Clicking the Edit Icon will open the following dialog box:

ONE-TIME FIELD EDIT

5202 ROSE CANYON CT
RANCHO CORDOVA, CA 95742

THE FOLLOWING FIELDS MAY BE UPDATED TO PRODUCE A REPORT ON THIS PROPERTY. THE INFORMATION ENTERED BELOW WILL APPEAR IN THIS INSTANCE OF THE REPORT ON THIS PROPERTY, BUT WILL NOT EDIT THE SOURCE DATABASE.

OWNER INFORMATION

OWNER NAME

FITZGERALD

MAIL ADDRESS

5202 ROSE CANYON CT

CITY

ST

ZIP

PROPERTY CHARACTERISTICS

LIVING AREA

2452

GROSS LIVING AREA

2452

LOT AREA

10094

BASEMENT AREA

TOTAL ROOMS

8

BEDROOMS

4

BATHROOMS

FULL

3

HALF

PARKING TYPE

GARAGE

GARAGE AREA

450

GARAGE CAPACITY

2

HEAT TYPE

CENTRAL

AIR CONDITIONING

CENTRAL

FIREPLACE

FOUNDATION

ROOF MATERIAL

SHINGLE

OF STORIES

POOL

STYLE

H-SHAPE

OTHER IMPROVEMENTS

CANCEL

RESET

CONFIRM

As you update the information, the selected fields will be highlighted in yellow.

BEDROOMS

5

BATHROOMS

FULL

4

HALF

Click Confirm to apply the changes.

Cancel

Reset

Confirm

You will receive a confirmation dialog box. Click Confirm to continue with the one-time edit.

ONE-TIME FIELD EDIT ✕

Do you want to add the one-time edits made here to the Property Detail Report output?

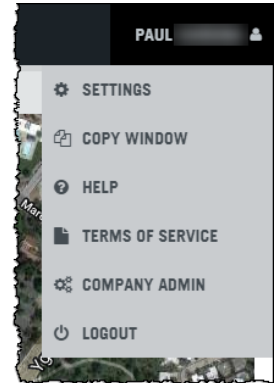
Cancel Confirm

Once the edits have been applied, the Property Detail Report will be updated and will contain a footer with the notification that modifications have been applied.

Property Characteristics			
Gross Living Area:	2,452 Sq. Ft.	Total Rooms:	8
Living Area:	2,452 Sq. Ft.	Bedrooms:	5
Total Adj. Area:		Baths (F / H):	4 /
Above Grade:		Pool:	
Basement Area:		Fireplace:	
Style:	H-Shape	Cooling:	Central
Foundation:		Heating:	Central
Quality:	Average	Exterior Wall:	
Condition:	Average	Construction Type:	Wood
Year Built / Eff:	2010	Parking Type:	Garage
Stories:		Garage #:	2
Garage Area:	450 Sq. Ft.	Porch Type:	
Patio Type:		Roof Type:	Shingle
Roof Material:	Shingle		
Site Information			
Land Use:	SFR	Zoning:	RD 5
State Use:		Lot Area:	10,094 Sq. Ft.
County Use:	1 Family Residential	Lot Width / Depth:	
Acres:	0.2317	Usable Lot:	
Site Influence:			
# of Buildings:	1	Water Type:	
Sewer Type:		Res / Comm Units:	
Tax Information			
Assessed Year:	2015	Assessed Value:	\$297,850
Tax Year:	2015	Land Value:	\$95,940
Tax Area:	08004	Improvement Value:	\$201,910
Property Tax:	\$5,454.08	Improved %:	67.79%
Exemption:		Total Taxable Value:	\$297,850
Market Total Value:		Market Land Value:	
Market Imprv Value:		Market Imprv %:	
Delinquent Year:			
THE FOLLOWING FIELDS HAVE BEEN MODIFIED BY USER/CUSTOMER ONLY FOR THIS REPORT: BEDROOMS, FULL BATHROOMS			

Logging Out

When you are finished using TitleFlex, please click on the Logout link located in your profile menu, at the top right hand corner.



Support:

For more information on using the customer feature or for general support: Support options can be found in the user controls on the profile menu of the TitleFlex window. Click the Help link for additional support and training resources.

Should you need immediate support, use the TitleFlex Live Chat feature.

