



**TitleFlex**  
by Data Trace

# CREATING AND MANAGING CUSTOMERS

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## Customers

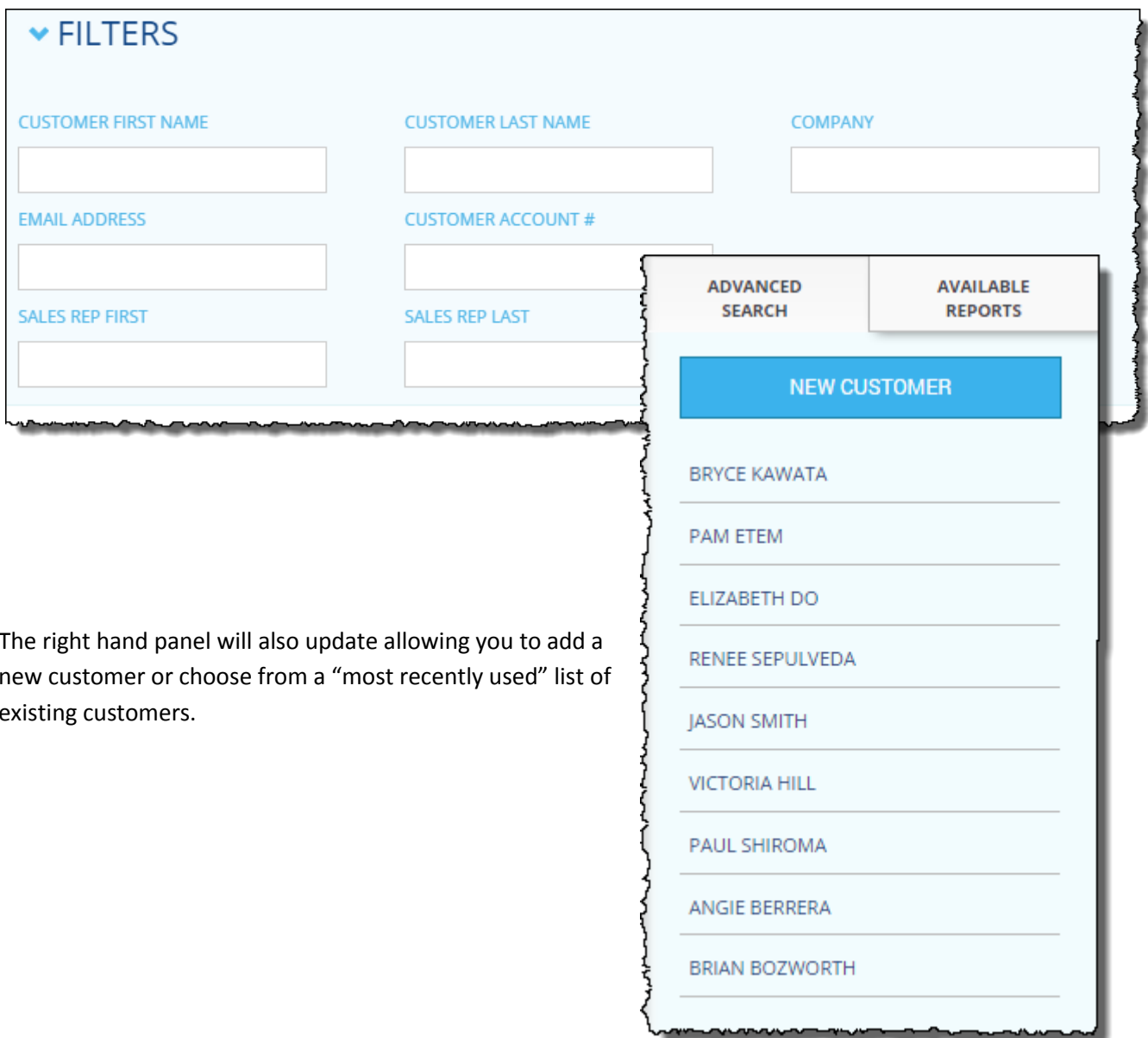
Customer information can be added and services provided to that customer tracked in TitleFlex. Additionally, custom packages and farms can be saved for each customer. Login to TitleFlex and click “Skip to Main Page” to begin.

### Starting with Customers

On the search bar at the top of the TitleFlex window, click on the Customers link.



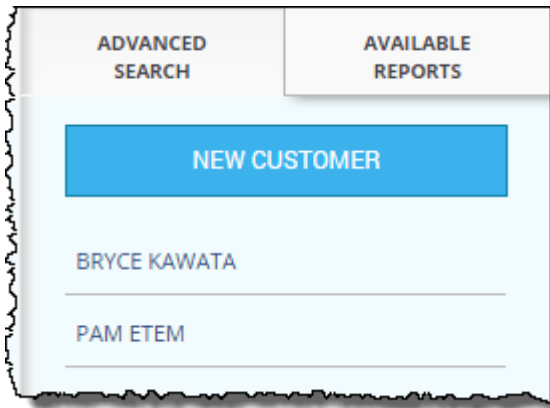
The multi-function panel will change to a filter tool allowing you to search for an existing customer.



The right hand panel will also update allowing you to add a new customer or choose from a “most recently used” list of existing customers.

## New Customers

To create a new customer, click the New Customer button at the top right hand corner of the Customer list and complete the fields. Note that the Sales Rep field entries are provided by your Administrator in the Company Admin tool. Contact your company Administrator to ensure sales reps have been added.



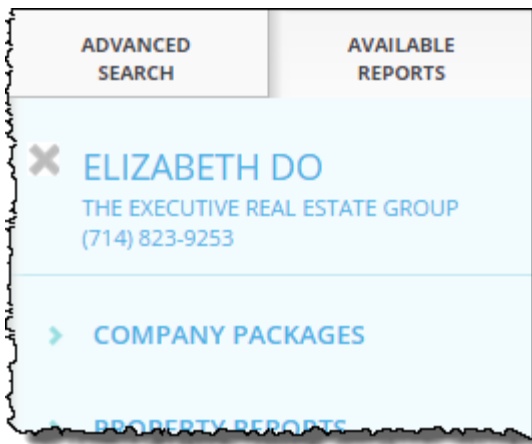
When creating a new customer, you can add the customer information along with any notes or interactions that may have occurred.

Custom packages and saved farms will only be available after the customer is created.

Click Create Customer at the bottom left to complete the entry.

## Existing Customer

To update or modify an existing customer, click on the customer name in the recently used list or, if the customer isn't showing up on the recently used list, click on the Customers button at the top and use the filters to locate them. Double-click on the customer name when you locate them.



Once selected, the customer will appear at the top of the right 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.

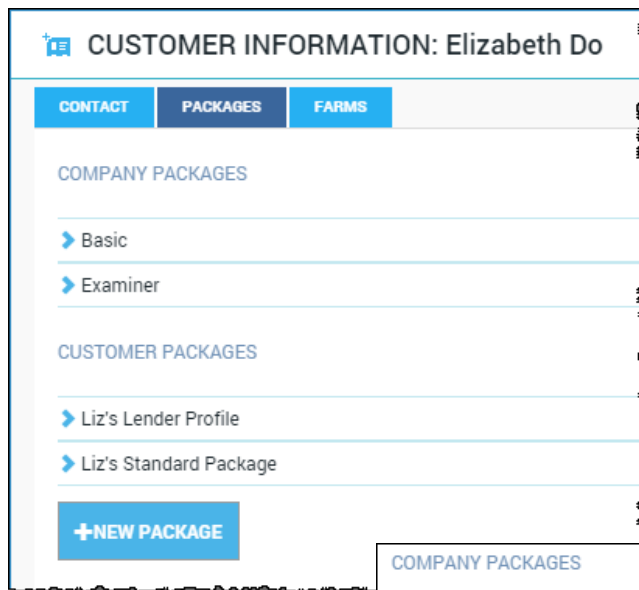
## Managing Customers

Once the customer is selected, 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.

This information can also be exported by your company's administrator so that the overall interactions can be tracked and services monitored for the return on investment.

## 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.

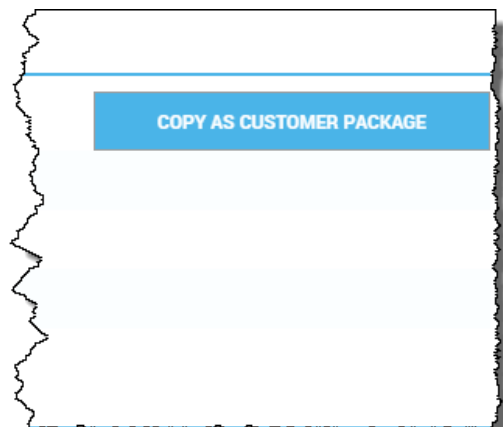
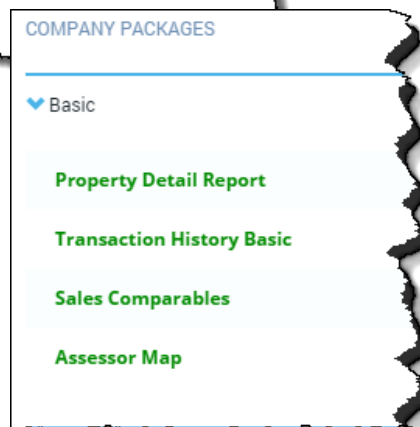


The company packages at the top are created by your Company administrator and can be used as starting templates or you can just create a new package by clicking on New Package.

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

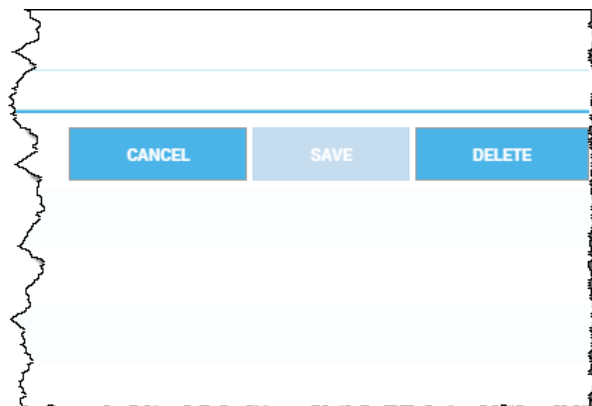
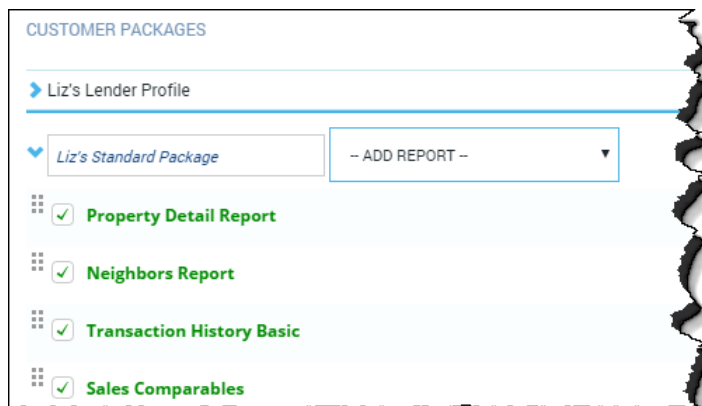
### Company Packages:

Note the Company Packages can be copied and used for the specific Customer.



### Customer Packages:

Existing Customer packages can be deleted or modified.



### Building and Modifying Packages:

Create a new package by clicking New Package (or copying a Company package) 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

If a customer no longer needs a particular farm, you can delete them through that customer's contact card. In the Customer contact card, click the Farms tab and then click the **DELETE** to the right of the farm that is no longer needed.

The screenshot shows a customer contact card with three tabs: "CONTACT", "PACKAGES", and "FARMS". The "FARMS" tab is active, displaying a table of farms. Each row includes the farm name, last modified date, modified by user, and a "DELETE" button.

FARM	LAST MODIFIED	MODIFIED BY	ACTION
92626 Large Lots	11/18/2015	Paul Shiroma	DELETE
92646 Large Lots	06/09/2015	Paul Shiroma	DELETE
Adams and Brookhurst	05/20/2015	Paul Shiroma	DELETE
Adams and Placentia List	05/29/2015	Paul Shiroma	DELETE
High Value Properties 92646	06/01/2015	Paul Shiroma	DELETE

Remember that new farms and modifying existing farms are handled in the main TitleFlex window.