ONBOARDING CUSTOMERS IN TITLEFLEX

Rev. 201704

This Sales Guide will focus on the required steps to bring a new customer online in TitleFlex along with the typical provisioning defaults from a Sales perspective.

The DataTree administration tool manages provisioning in TItleFlex. Consequently, the provisioning screens will show “New DataTree” and “Classic DataTree”. You are only concerned with the sections for “New DataTree” as these are the provisioning features for TitleFlex.

Table of Contents

Creating New Accounts

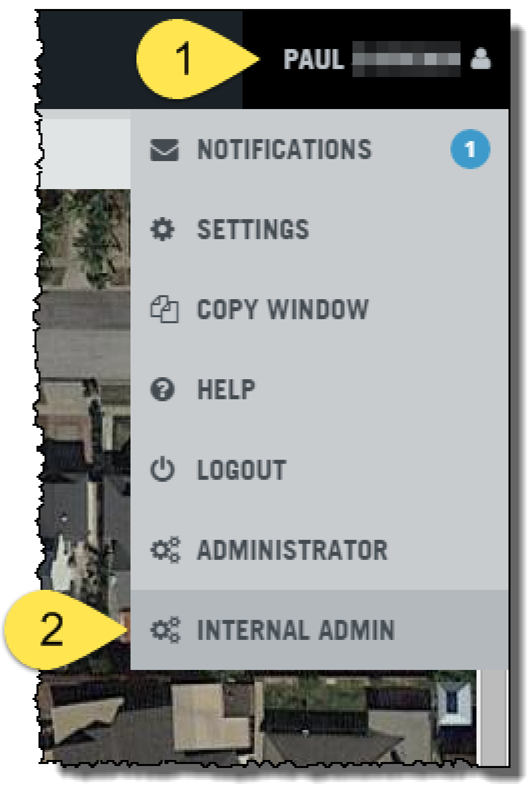
The **Internal Admin** includes the ability to create an electronic EULA, provision companies and the client administrator, create trials, and (for sales approvers) approve custom pricing.

Overview

The process for provisioning a client on the new DataTree.com can be broken into five general steps:

1. Enabling platform access
2. Enabling report access and pricing
3. Entering the client's company information and your information
4. Securing custom pricing approval (only required for custom pricing from step two)
5. Client accesses platform

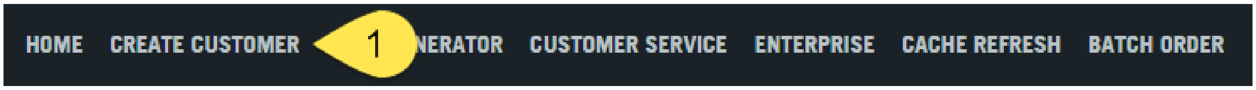
To access the Internal Admin features, log into the new DataTree.com, click the Profile menu (1) and then click Internal Admin (2).



Enabling Platform and Search Access.

Click the Create Customer button to begin the process.

NOTE: The provisioning screens will reference “New DataTree” and “Classic DataTree”. Please use the “New DataTree” options.



Geographic Access

Leave Nationwide selected, as shown, as the platform is designed to search at a nationwide level.

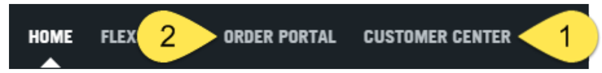
NOTE:
The following screenshots will show the <u>typical or recommended</u> setup. Click on the red x or green check mark to enable or disable an option to enable or disable an option for a customer.

Authorized Services

Enable the following feature as shown in the screenshot by clicking the red x to change it to a green checkmark:

1. In the New DataTree drop down list, change the entry from DataTree to TitleFlex.
2. CRM: Enabled. Basic contact management functionality for Title Customers in TitleFlex.
3. One-Time Editing: Enabled. This will allow non-permanent changes to the Property Detail Report for printing purposes only.
4. Property Detail Auto Load: Disabled. This feature automatically loads the Property Detail Report when a property is selected which will charge the customer. Leave this off (red x).
5. Batch Ordering: Disabled unless requested by the customer.

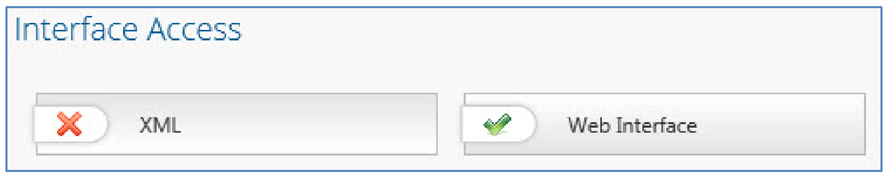
CRM activates the Customer feature (1). Batch Ordering activates the Order Portal (2).



One-Time Editing provides the edit option (3). Changes made are for printing purposes only and do not permanently affect the data.

Interface Access

Leave as Web Interface so that the customer can access TitleFlex through a browser.

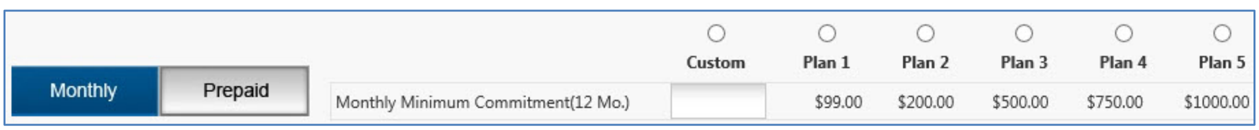


Pricing

The pricing is broken into two parts: The Monthly Pricing Plan and feature access and their prices.

Monthly Pricing Plan:

Leave Monthly selected. No prepaid plans are available for new customers.

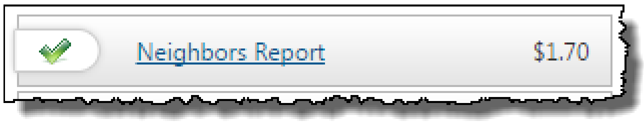
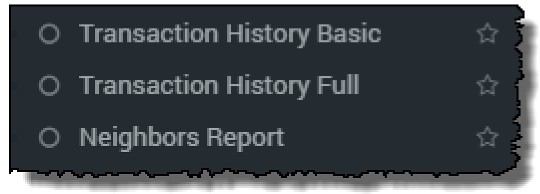
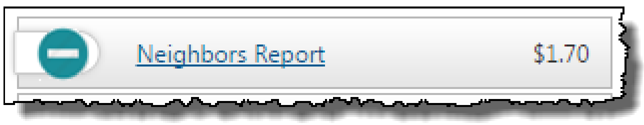
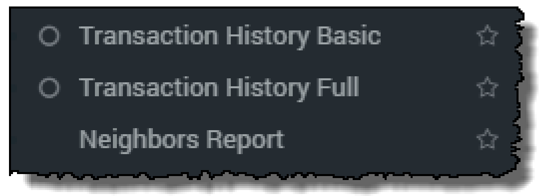


Next, select a monthly commitment (Custom or plans one through five) in the radio buttons at right.

NOTE: Selecting the Custom plan will allow you to setup a unique monthly minimum amount and specific report pricing. Do not select the Custom pricing radio button unless you want custom pricing for the monthly commitment and all products.

This will also trigger the system to send an email to your managed and the Finance team to approve your custom pricing. Your client will not be able to access TitleFlex until the custom pricing is approved (described later in the document).

IMPORTANT:
The following pages describe the report provisioning. The functionality allows you to control whether or not a report is orderable and visible as described in the following table:

Green Checkmark 	Visible / Orderable. 
Circle with Dash 	Visible only. 
Red x 	Unavailable. 

Features and pricing

After selecting a monthly plan, you have the option to change the pricing for an individual report. If you select Custom pricing, you must manually enter all price points.

Complete the following sections: Recorded Documents, Property Reports, Property Lists, and AVM Reports. Flood, Appraisal & Valuation, Property Ownership (O&E) and Fraud & Verification are optional and require a hard-copy contract. See the Appendix: Managed Services Products for more information.

Click the section headers in the left hand frame (e.g. Property Reports, Property Lists, AVM Reports) to switch to those sections and modify their options.

NOTE:

The screenshots show only the New DataTree (a.k.a. TitleFlex) options. If you need to change a per report price, click in the blank text box to the right of the report name and enter the custom price.

Figure One: Recorded Documents Screenshot:

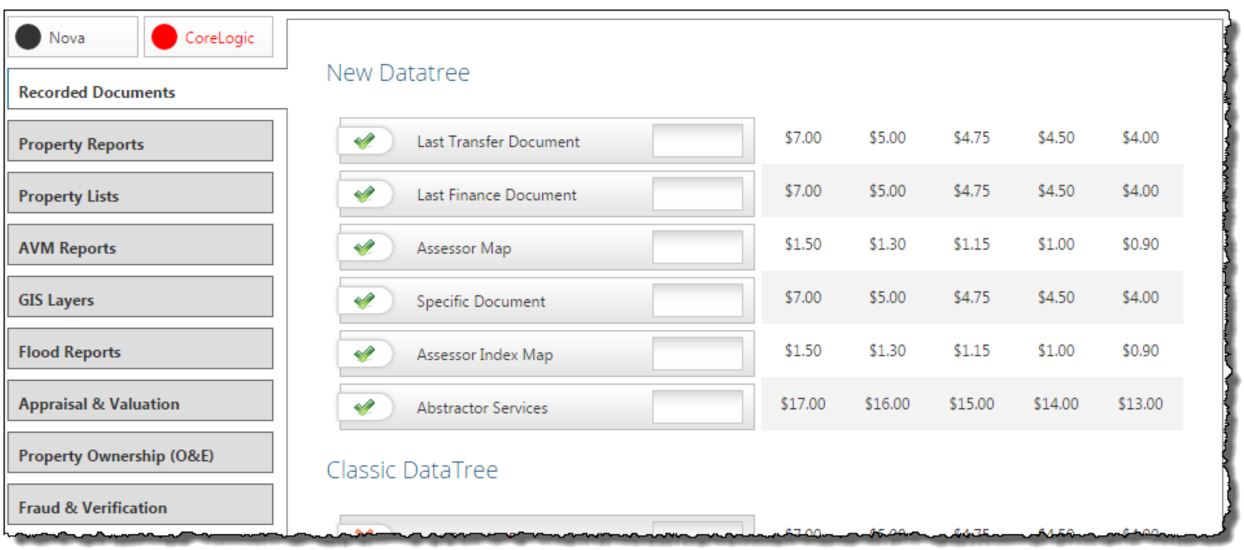
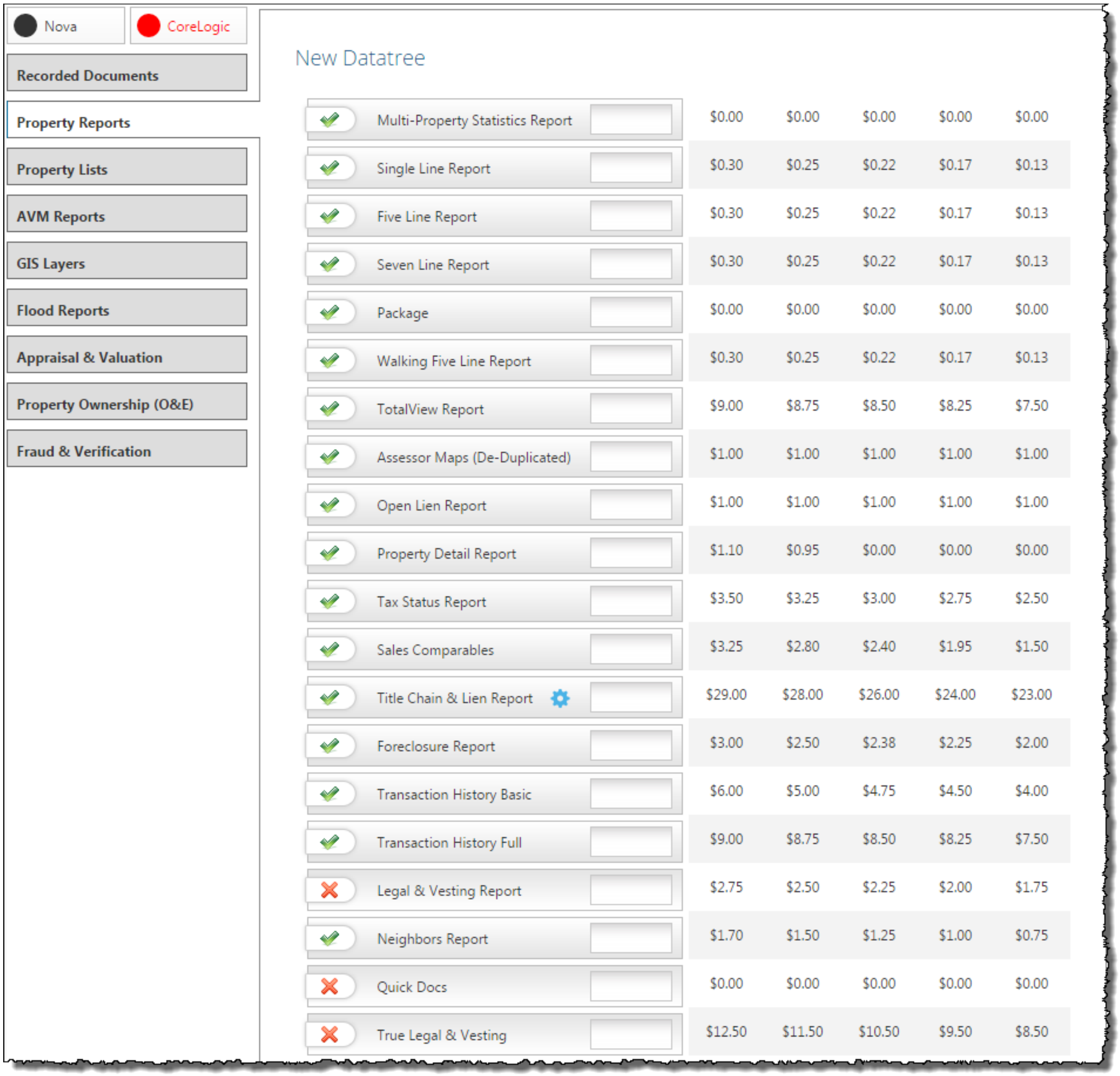


Figure Two: Property Reports Screenshots:



Multi-Property Statistics Report	$0.00	$0.00	$0.00	$0.00	$0.00
Single Line Report	$0.30	$0.25	$0.22	$0.17	$0.13
Five Line Report	$0.30	$0.25	$0.22	$0.17	$0.13
Seven Line Report	$0.30	$0.25	$0.22	$0.17	$0.13
Package	$0.00	$0.00	$0.00	$0.00	$0.00
Walking Five Line Report	$0.30	$0.25	$0.22	$0.17	$0.13
TotalView Report	$9.00	$8.75	$8.50	$8.25	$7.50
Assessor Maps (De-Duplicated)	$1.00	$1.00	$1.00	$1.00	$1.00
Open Lien Report	$1.00	$1.00	$1.00	$1.00	$1.00
Property Detail Report	$1.10	$0.95	$0.00	$0.00	$0.00
Tax Status Report	$3.50	$3.25	$3.00	$2.75	$2.50
Sales Comparables	$3.25	$2.80	$2.40	$1.95	$1.50
Title Chain & Lien Report	$29.00	$28.00	$26.00	$24.00	$23.00
Foreclosure Report	$3.00	$2.50	$2.38	$2.25	$2.00
Transaction History Basic	$6.00	$5.00	$4.75	$4.50	$4.00
Transaction History Full	$9.00	$8.75	$8.50	$8.25	$7.50
Legal & Vesting Report	$2.75	$2.50	$2.25	$2.00	$1.75
Neighbors Report	$1.70	$1.50	$1.25	$1.00	$0.75
Quick Docs	$0.00	$0.00	$0.00	$0.00	$0.00
True Legal & Vesting	$12.50	$11.50	$10.50	$9.50	$8.50

NOTE: Leave Legal & Vesting, Quick Docs, and True Legal & Vesting disabled. Both L&V reports are unsupported. Quick Docs is for a specific client and requires prior VP approval from Products.

The Assessor Maps (De-Duplicated) will ensure that a user is not charged for multiples of the same assessor map when ordering lists of properties that all fall in the same map. Make sure that the price inserted here is the same as the Assessor Map price in the Recorded Document section.

Figure Three: Property Lists Screenshots:

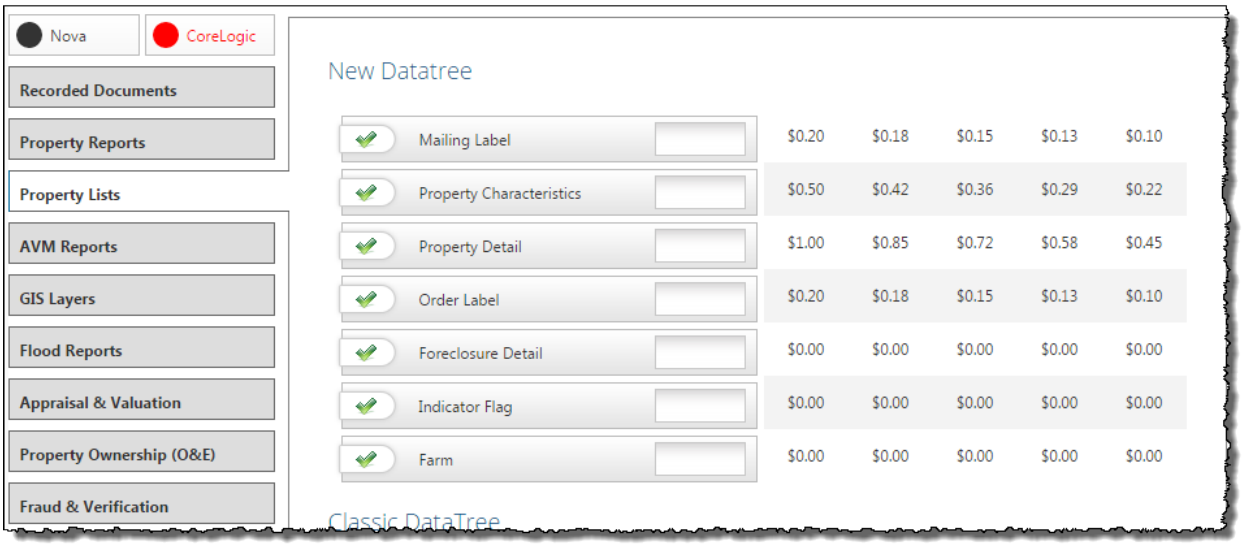


Figure Four: AVM Reports Screenshot:

Enable per your client's request.

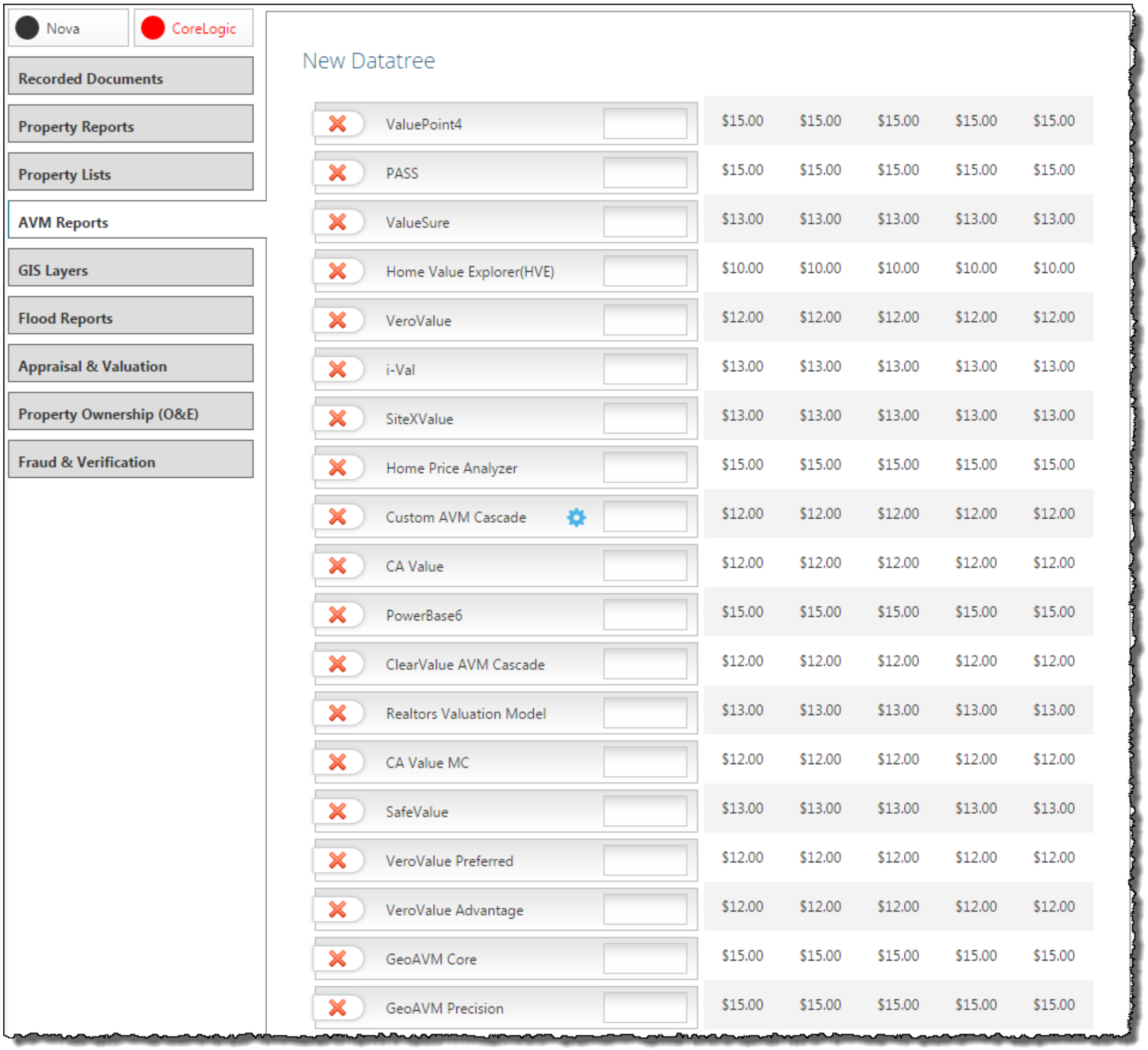


Figure Five: GIS Layers

These features enable the pins and overlays on the map.

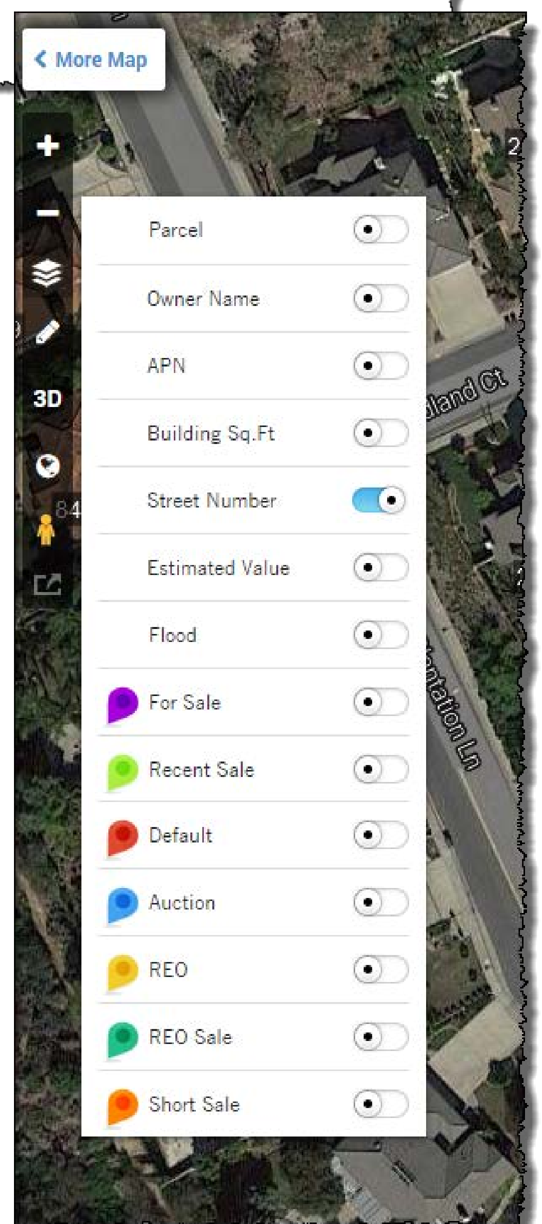
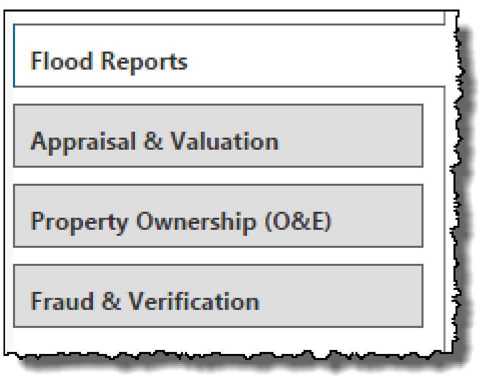
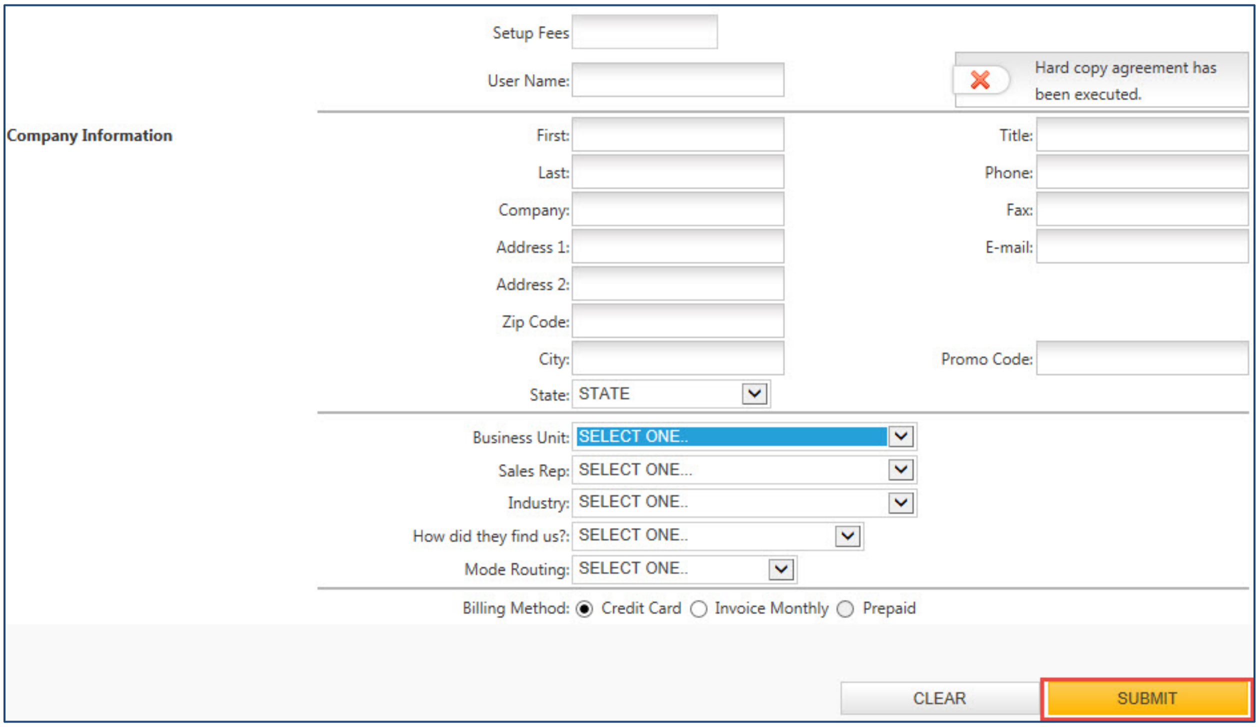


Figure Six: Managed Services Products (below)

See the Appendix for more information on provisioning managed services products.



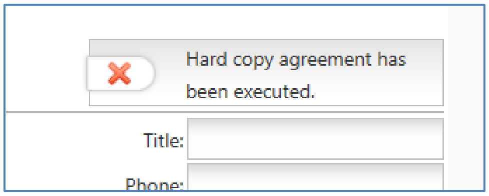
Company Information

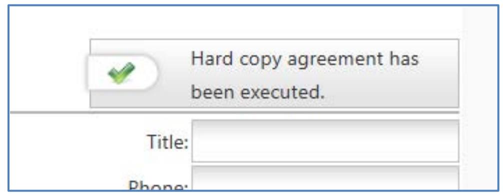


Enter the following information:

- Setup Fees: Insert 0 if there are no setup fees.
- The username will be the client's administrator account.
- All customer information.
- Business Unit: Select your unit, e.g. DBS, FAMS or Interthinx.
- Sales Rep: This is dependent upon the Business Unit selection. Your name will not appear unless you select your Business Unit.
  - NOTE: Selecting your name affects two things:
  - Commissions: Make sure your name is entered.
  - You will be cc'ed on the system correspondence to the customer so you know when the emails goes out.
- Complete the Industry, How Did They Find Us selection, and Routing selections.
- In the Billing Method select Monthly Invoice:
  - NOTE: Certain sales teams may require the credit card or prepay methods. If in doubt, check with your sales manager.
  - You may select Credit Card or Prepaid under the following circumstances:
  - Select Credit Card ONLY if the client admin has credit card authorization. At first login, the system will require the client admin to enter the company credit card to complete the setup.
  - Select Prepaid ONLY if the customer has already provided credit card authorization for a fixed amount to be credited into their account. All activity is drawn against that prepaid amount.

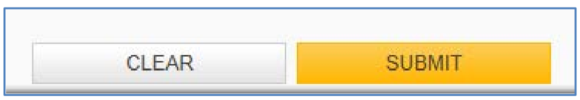
NOTE: By default, “Hard copy agreement has been executed” is disabled, meaning the customer is going to accept the online EULA (a click-thru). If the customer is receiving a hard copy agreement for wet signature, enable this option by clicking on the red x and changing it to a green checkmark so that they will not have to accept the online EULA.



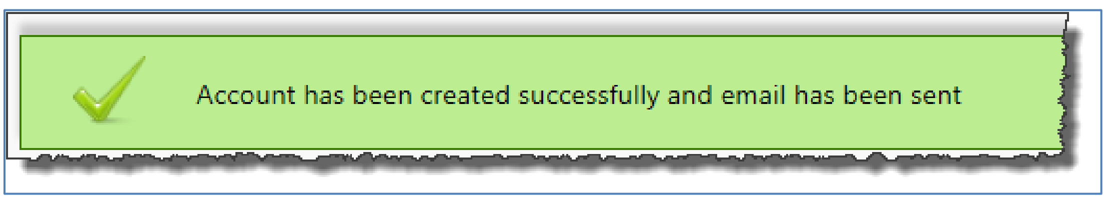


They must still accept pricing. See the Client Experience Section (following) to see how this choice affects the client administrator’s first login.

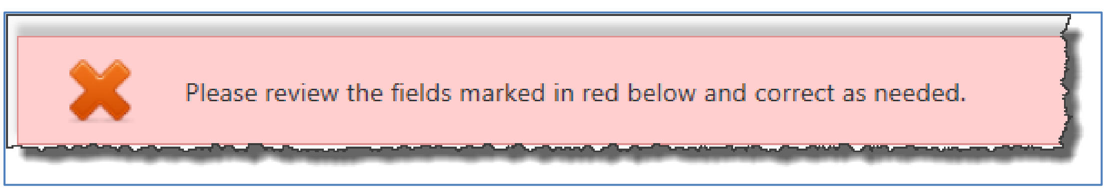
Click Submit at the bottom of the form:



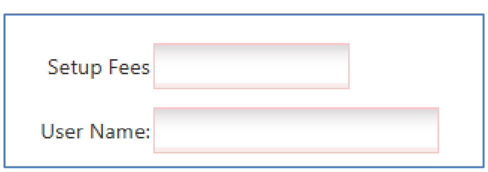
If you have correctly entered all required information, you will receive the following confirmation:



If there is a missing field, you will receive the following message. Please correct the highlighted fields.



Example:



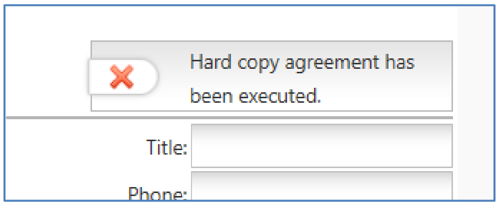
The highlighting is a bit faint so look carefully.

Client Accesses Platform:

The client administrator will receive two emails, one with their username (that you entered in the company information section) and one with a system-generated password. See Appendix items one and two for copies of the emails. At their first login, the client administrator will have a slightly different experience based upon the following:

Hard Copy Agreement has NOT been executed:

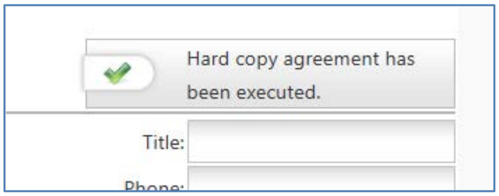
If this option is disabled (red x), at their first login, the client will be:



- Prompted to change their password
- Accept the EULA
- Accept pricing

This is the default. A PDF copy of the EULA is in the Appendix at the end of this document.

Hard Copy Agreement HAS BEEN executed:



- If this option is enabled, as shown here, the client administrator will:
- Not be presented with the online EULA
- Will have to accept the pricing.

Once the client administrator has accepted the pricing (and EULA per the first option), you, your sales manager, and the customer will receive a confirmation email (along with a pdf version of the EULA per the first option).

See Appendix, Item Four for a copy of the confirmation email.

Sales Approval

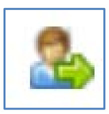
NOTE: This process is only required when custom pricing has been entered.

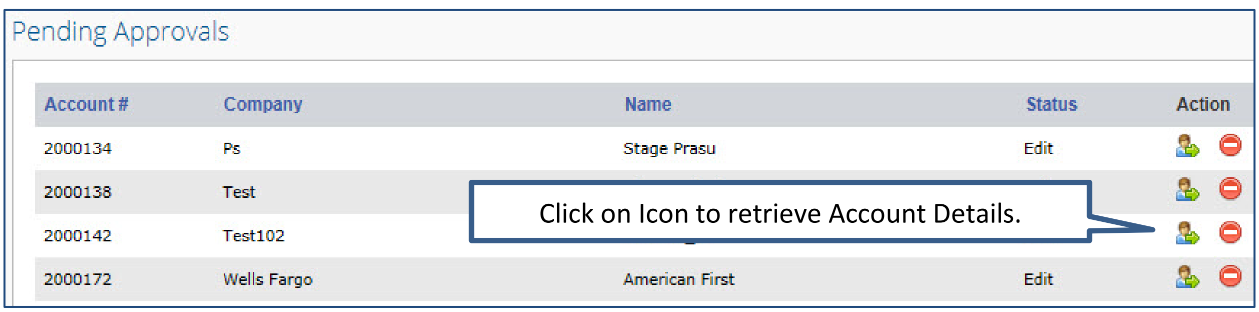
The Sales Approval section allows the designated manager to approve custom pricing. This manager will receive an email informing them that their approval is required. See Appendix Item Five for an example of the email.

Pending Approvals

The designated approver can log in to DataTree.com directly from the email and access the Sales Approval form through the Internal Admin

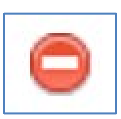
After clicking Sales Approval, locate the account in question from the Pending Approvals list and click the “View Details” icon:




Pending Approvals

Account #	Company	Name	Status	Action
2000134	Ps	Stage Prasu	Edit	
2000138	Test			
2000142	Test102			
2000172	Wells Fargo	American First	Edit	

Do not click the “Delete Company” button unless you mean to delete the company.



Click Approve to approve the custom pricing.

Company Information

Contact Information

Account #:	2000836
User ID:	testccuser1
Name:	test test
Title:	test
Company:	test
Address:	test
	test
	Fountain Valley CA 92708
Phone:	(989)898-9898
Fax:	
E-mail:	cmamiduri@firstam.com
Industry:	Other

Billing Information

Billing Method:	MMC Credit Card

Pricing Plan

Commitment	$750.00
Last Transfer Document	$4.50
Last Finance Document	$4.50
Assessor Map	$4.50
Transaction History Search	$4.50
Transaction History Search (CL)	$4.50
Voluntary Lien Search	$8.25
Involuntary Lien Search	$16.00
Property Ownership Search	$24.00
Specific Document	$4.50
Multi-Property Statistics Report	$0.00
Single Line Report	$0.00
Five Line Report	$0.00
Seven Line Report	$0.00
Property Information	$0.90
Sales Comparables	$3.40
Tax Status Report	$2.75
Legal & Vesting w/ Transaction History	$10.00
Statewide Search (CL)	$0.15
Abstractor Services	$27.00
Data Export	$0.25
Mailing Labels	$0.13
ClearValue AVM Cascade	$0.00
ValuePoint4	$15.00
PASS	$15.00
ValueSure	$15.00
Property Information	$0.00
Latest Deed	$0.00
Latest Mortgage	$0.00
Specific Document	$0.00
Setup Fees	$1000.00

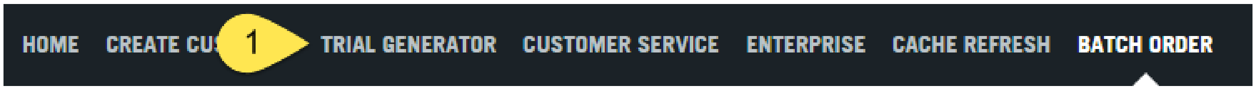
Click here to approve Account details with Pricing Plan.

CANCEL APPROVE

Trial Generator

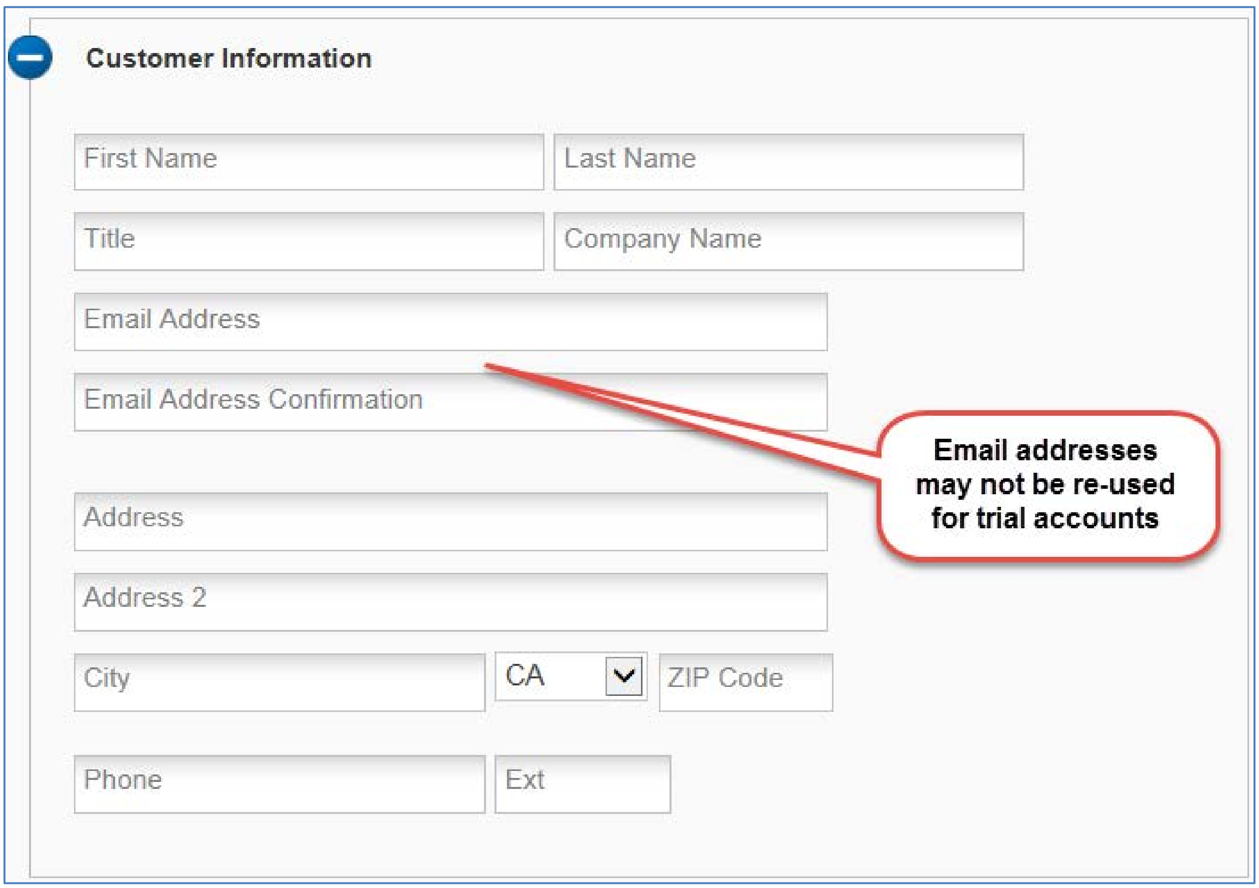
The trial generator allows limited access for 14 days to TitleFlex for potential customers to experience the platforms' capabilities.

In the Internal Admin header, click the Trial Generator.



Customer Information

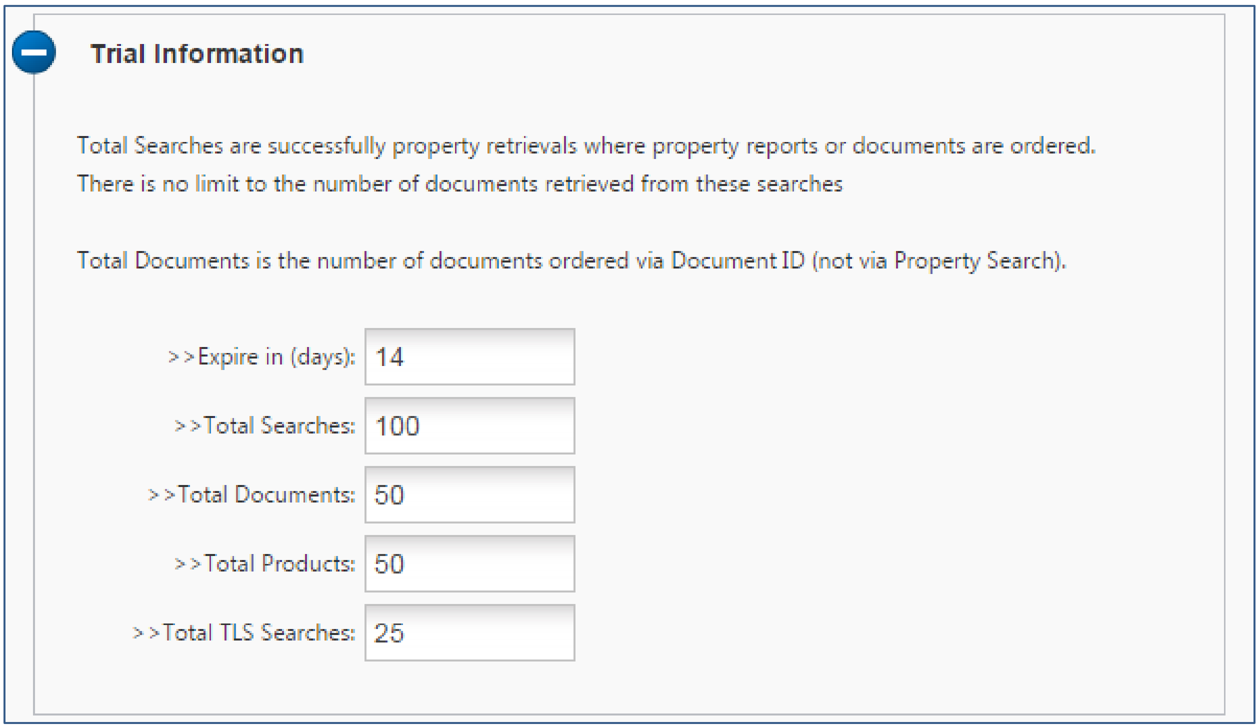
Enter the customer information. Once an email address is used for a trial account, it may not be re-used to create another trial.



Trial Information

The number of trial duration, total searches, products, searches and total products to be ordered is managed here. Once submitted, a trial username will be created and emailed to the client at the email provided.

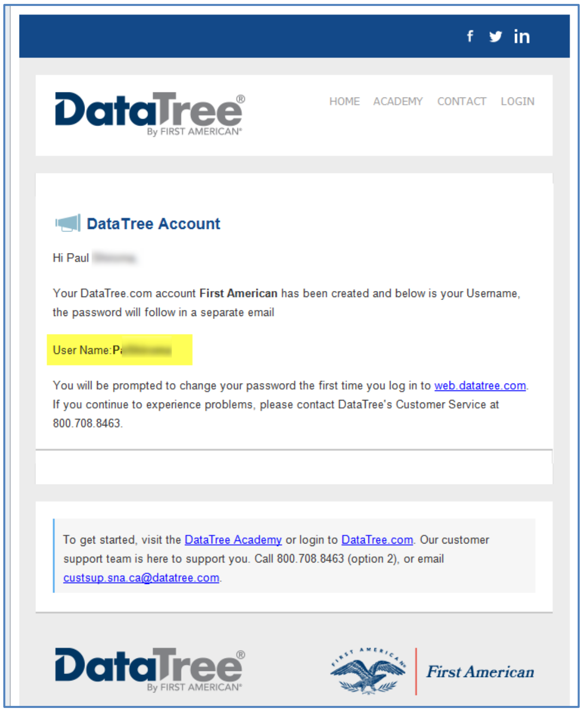
The total number of searches is fixed at 100.



Appendix:

Items One and Two:

Client emails with username and password. Your email address will appear in the cc line of the email with the user name (at left).



HOME ACADEMY CONTACT LOGIN

DataTree Account

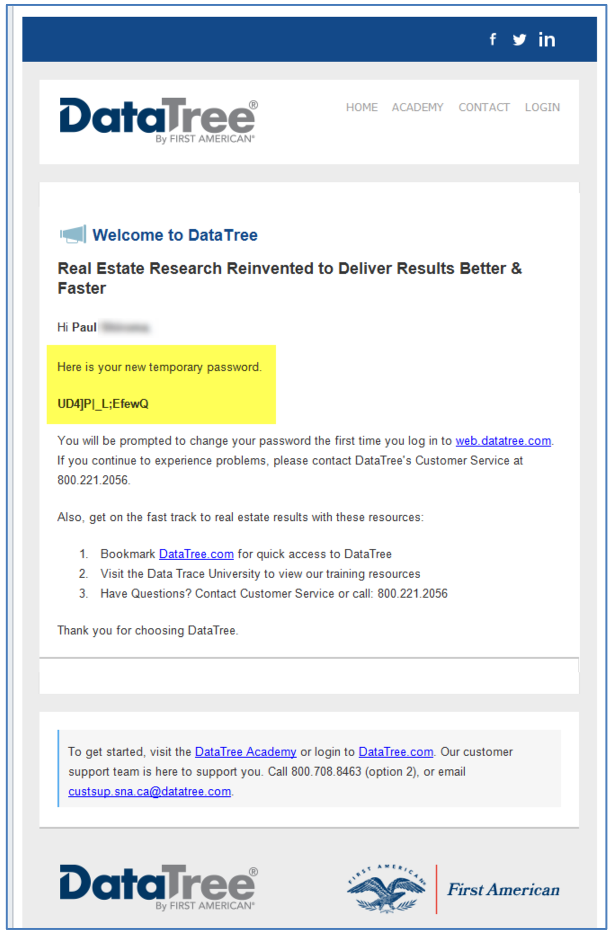
Hi Paul

Your DataTree.com account **First American** has been created and below is your Username, the password will follow in a separate email

User Name: P

You will be prompted to change your password the first time you log in to web.datatree.com. If you continue to experience problems, please contact DataTree's Customer Service at 800.708.8463.

To get started, visit the DataTree Academy or login to DataTree.com. Our customer support team is here to support you. Call 800.708.8463 (option 2), or email custsup.sna.ca@datatree.com.



HOME ACADEMY CONTACT LOGIN

Welcome to DataTree

Real Estate Research Reinvented to Deliver Results Better & Faster

Hi Paul

Here is your new temporary password.

UD4]P|_L;EfewQ

You will be prompted to change your password the first time you log in to web.datatree.com. If you continue to experience problems, please contact DataTree's Customer Service at 800.221.2056.

Also, get on the fast track to real estate results with these resources:

1. Bookmark DataTree.com for quick access to DataTree
2. Visit the Data Trace University to view our training resources
3. Have Questions? Contact Customer Service or call: 800.221.2056

Thank you for choosing DataTree.

To get started, visit the DataTree Academy or login to DataTree.com. Our customer support team is here to support you. Call 800.708.8463 (option 2), or email custsup.sna.ca@datatree.com.

Item Three: EULA

DataTree.com EULA.pdf

Item Four: Confirmation Email

From: [redacted]
Sent: Thursday, April 23, 2015 1:16 PM
To: [redacted]
Cc: [redacted] Agreements (SNA)
Subject: DataTree.com Account Confirmation

This is a commercial message sent by First American Data Tree.

DataTree® By FIRST AMERICAN®

Share and Connect

Dear [redacted]

Thank you for choosing DataTree.com from First American Data Tree! We value our customers and look forward to providing you with instant access to the nation's largest land document database. Below is a summary of your account information for your records.

Account Information

Creation Date:	4/23/2015
Contact Information	
Account #:	[redacted]
User ID:	[redacted]
Name:	[redacted]
Title:	**Managing Director**
Company:	**Secure Document Research**
Address:	**917 Tahoe Blvd.**
	Suite 302
	[redacted]
Phone:	[redacted]
Fax:	
E-mail:	[redacted]
Industry:	**Document Retrieval**
Billing Information	
Billing Method:	**MMC Credit Card**
Term:	**12 Months**
Card Type:	**Visa**
Card Number (Last 4 Digits):	**3471**
Card Expiration:	**04/2018**
Cardholder Name:	[redacted]
Pricing Plan	
Commitment	**$500.00**
Last Transfer Document	**$4.75**
Last Finance Document	**$4.75**
Assessor Map	**$4.75**
Transaction History Search	**$4.75**
Voluntary Lien Search	**$8.50**
Involuntary Lien Search	**$17.00**
Property Ownership Search	**$25.00**
Specific Document	**$4.75**
Property Information	**$1.00**
Sales Comparables	**$3.50**
Tax Status Report	**$3.00**
Legal & Vesting w/ Transaction History	**$10.00**
Statewide Search	**$0.25**
*Abstractor Services	**$27.00**
Data Export	**$0.30**
Mailing Labels	**$0.15**
ValuePoint4	**$17.00**
PASS	**$17.00**
ValueSure	**$17.00**
Setup Fees	**$0.00**

*Abstractor Services is $27.00 per document plus any applicable abstractor fees

To get started, click here to view and download a step-by-step User Guide or click below and enter your user ID and password to begin using DataTree.com. If you have any questions or need assistance, please do not hesitate to contact a customer support representatives at 800-708-8463(option 2), or email custsup.sna.ca@datatree.com.

Sign In

Item Five: Custom Pricing Approval Email

From:
Sent: Thursday, April 23, 2015 10:21 AM
To:
Cc:
Subject: DataTree.com – Request For Custom Pricing Approval

This is a commercial message sent by First American Data Tree.

DataTree® By FIRST AMERICAN®

Share and Connect

The following customer order contains custom pricing as requested by David Gomez. A summary of the account has been provided below. **Please go to the Custom Pricing Approval page and use the following information to submit approval.**

Account Summary

Creation Date:	**4/23/2015**
Contact Information	
Account #:	[illegible]
User ID:	[illegible]
Name:	[illegible]
Title:	**Owner**
Company:	**Compass Appraisals**
Address:	**30 Landing Circle** **Suite 105** [illegible]
Phone:	[illegible]
Fax:	
E-mail:	[illegible]
Industry:	**Appraisal**
Billing Information	
Billing Method:	**MMC Credit Card**
Pricing Plan	
Commitment	**$125.00**
Last Transfer Document	**$5.00**
Last Finance Document	**$5.00**
Assessor Map	**$0.00**
Transaction History Search	**$0.00**
Specific Document	**$5.00**
Property Information	**$0.00**
Sales Comparables	**$0.00**
Abstractor Services	**$27.00**
Data Export	**$0.25**
Setup Fees	**$0.00**

Appendix: Managed Services Products

These products require an executed hard copy master licensing agreement. ELS provisions all managed services products accessed in DataTree and require a separate account in the ELS systems. Pricing is in the MLA and is not part of the DataTree Admin Tool.

Overview:

Provisioning Managed Services products

1. SalesForce Account Setup: Create a new Account Setup Request for the customer account.
2. DataTree Admin Tool: Create a new customer account or update an existing customer account in DataTree and provision the products on the customer contract.
3. Verify that the Managed Services approval process has completed and the products are available for your customer to order from DataTree.

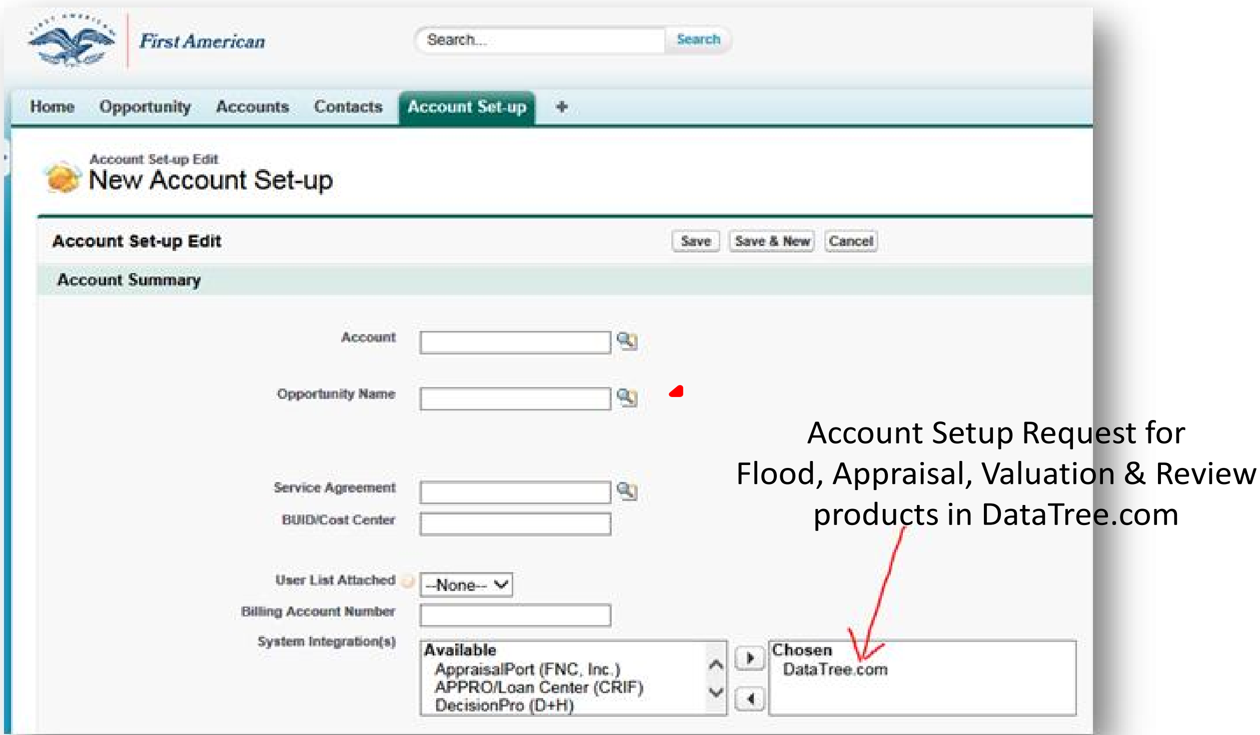
Notes:

- Managed Services products are setup in parallel to setting up the customer in DataTree. You do not have to wait to complete the Managed Services contact to provision a customer in DataTree.
- Managed Services products will appear on the DataTree menu, but will not be fully available for ordering until the ELS team enters the customer’s credentials in the Account Profile.
- If a customer uses the Managed Services products before ELS has completed their setup, they will receive the following message: “This product is currently in the approval and setup process. It will be available soon. Please try again later.”

Step 1) SalesForce Account Setup Request

Complete an Account Setup Request for the ELS system. Make sure that you have the MLA and the Acct Setup - Non-Home Equity Client Management Summary form completed. Attach both documents to the Account Setup Request.

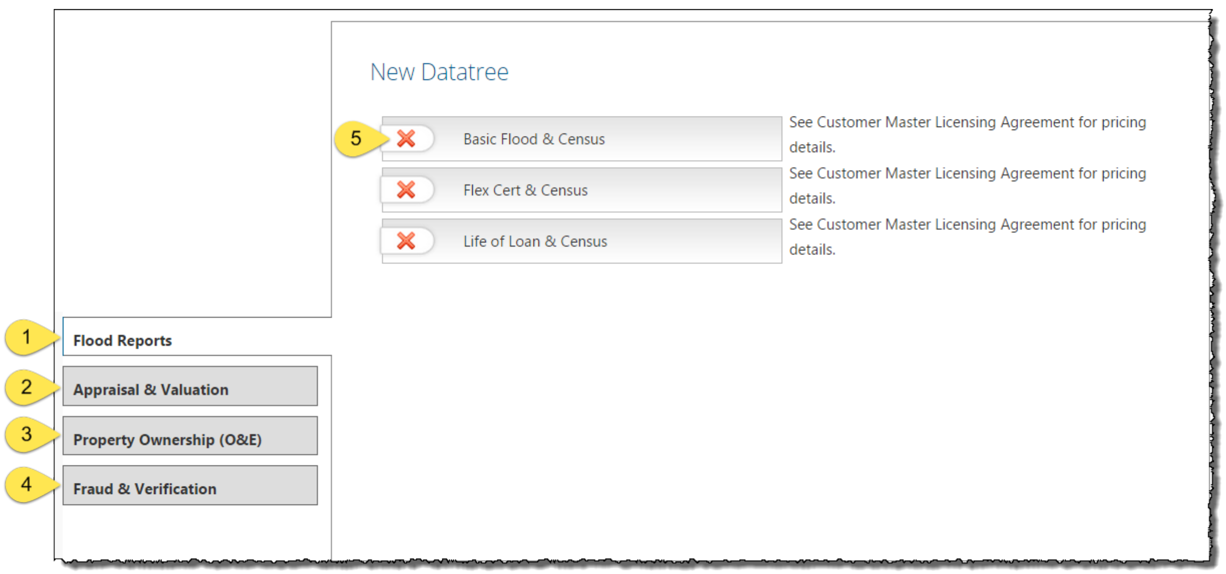
In SalesForce select the Account Set-up tab. Complete the required fields and select DataTree.com as the System Integration option.



Step 2) Existing Customers

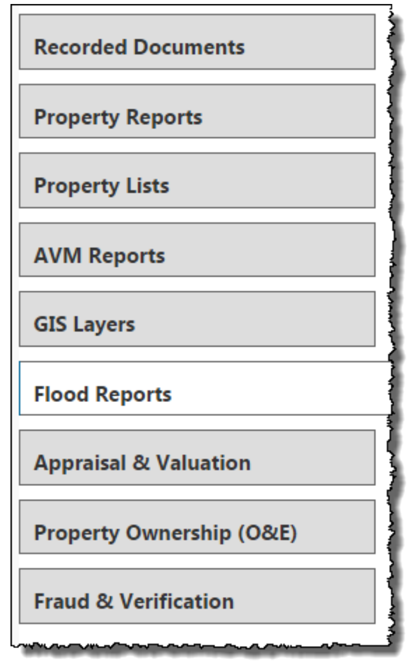
In the DataTree Admin tool, select the Customer Service option and find the account.

Click Edit Pricing in the customer account. Enable the reports as specified in the customer's contract. The pricing details are in the Master Licensing Agreement.



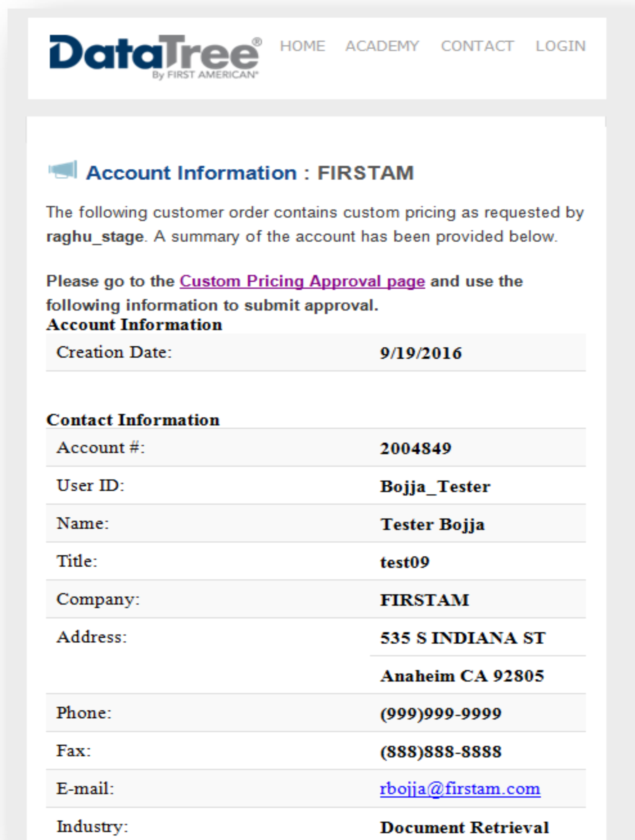
Step 2) New Customers:

In DataTree Admin, select the Create Customer option and enter the appropriate account information. Provision all sections as required.



Step 3) Verify Managed Services Email Approval

When you enable a Managed Services product in the DataTree Admin tool, the Admin tool sends an email to ELS for product approval.


DataTree By FIRST AMERICAN

HOME ACADEMY CONTACT LOGIN

Account Information : FIRSTAM

The following customer order contains custom pricing as requested by **raghu_stage**. A summary of the account has been provided below.

Please go to the Custom Pricing Approval page and use the following information to submit approval.

Account Information

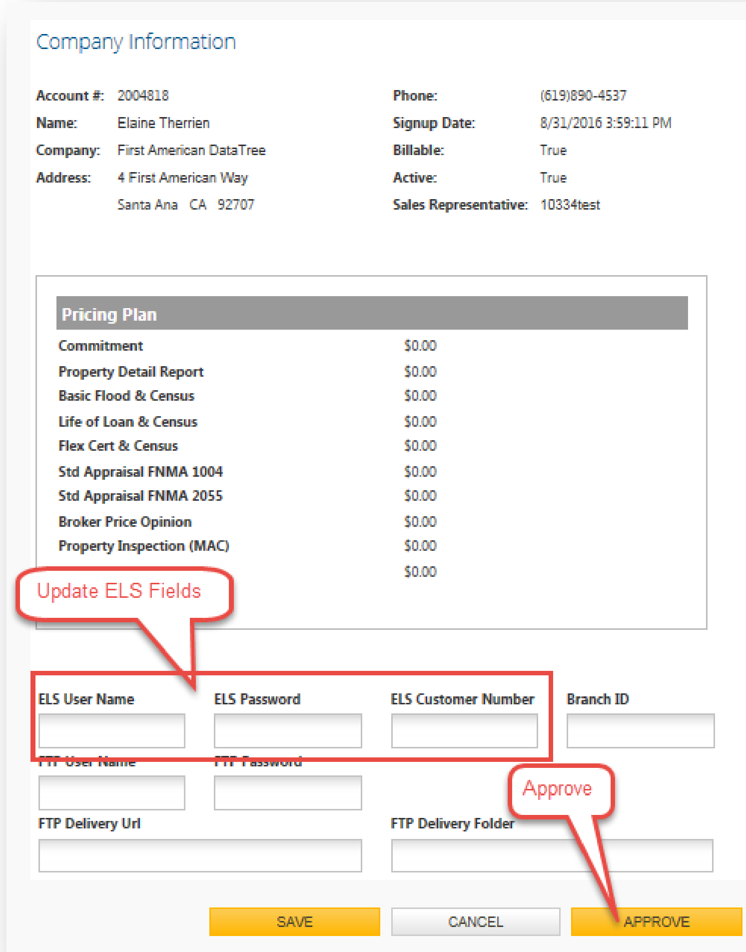
Creation Date:	**9/19/2016**

Contact Information

Account #:	**2004849**
User ID:	**Bojja_Tester**
Name:	**Tester Bojja**
Title:	**test09**
Company:	**FIRSTAM**
Address:	**535 S INDIANA ST**
	Anaheim CA 92805
Phone:	**(999)999-9999**
Fax:	**(888)888-8888**
E-mail:	rbojja@firstam.com
Industry:	**Document Retrieval**

ELS will setup:

- The account in the ELS Billing System, and,
- Enter the ELS customer account information into DataTree.com enabling access to the products.



Managed Service Setup & Support Contacts

Function	Contact	Phone	Email
ELS Account Setup & Approval	Lorraine Bernazzoli		lbernazzoli@firstam.com
Flood Product Support	Customer Service Queue		els.floodcs@firstam.com
Appraisal, Valuation and Review Product Support		866.575.8484	els.appraisalcs@firstam.com
Escalation Level 1 Appraisal, Valuation & Review	Carrie Plas, Supervisor Customer Service	216.416.7108	cplas@firstam.com
Escalation Level 2 Appraisal, Valuation & Review	Adrienne Ippolito, Valuation Services Manager	216 416-7103	aippolito@firstam.com