



TitleFlex
by Data Trace

CONFIGURING AND MANAGING USER SETTINGS

Rev. 201511

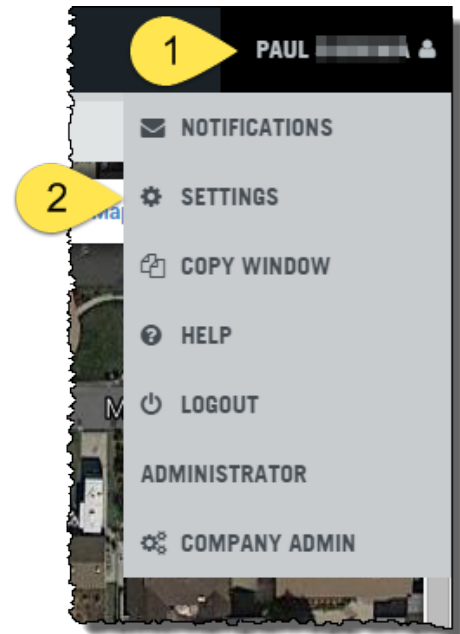
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Overview

This guide covers configuring the **default** user preferences and settings in TitleFlex and includes topics such as report options, notification emails, cover pages and usage statistics. Remember that these are user-specific settings and do not change the settings for the company.

The user settings (2) is accessed from the Profile menu (1) at the top right hand corner of the TitleFlex user interface.



The settings dialog window covers:

- User Account Information including the ability to change the user's password
- User Preferences affecting report displays and email options
- Usage information for that user

NOTE: Your account may not include everything shown here, as some features may not have been included in your company's contract.

Account Tab

The user can change their password (1) from this tab or notify their local admin to update the contact information (2).

The screenshot shows a 'SETTINGS' window with a sidebar on the left containing four menu items: 'ACCOUNT' (USER ACCOUNT INFORMATION), 'PREFERENCES' (USER PREFERENCES), 'COVER PAGE' (COVER PAGE & LOGO), and 'USAGE REPORT' (ACTIVITY ANALYTICS). The main content area is titled 'USER ACCOUNT INFORMATION' and contains the following fields: 'Name' (Paul), 'Company', 'Email', 'Phone', 'Address' (4 First Way, address213, Santa Ana, CA 92708), and 'Account ID' (2000001). A callout '3' points to the 'Account ID' field. Below these fields is a link with an envelope icon and the text 'Contact your account administrator to update your information', with a callout '2' pointing to it. At the bottom of the main content area is a 'CHANGE PASSWORD' section with callout '1', containing three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right of the settings window are 'Cancel' and 'Save' buttons.

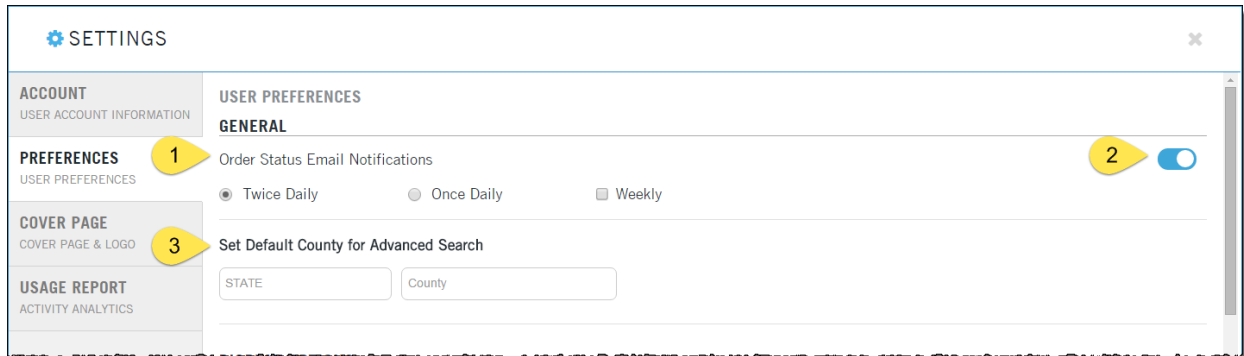
The Account ID field (3) is important, as occasionally you may need to provide this to the TitleFlex Customer Service team should you ever need to call or text for assistance with the product.

Preferences Tab

The Preferences Tab contains options for email notifications from the Order Portal, report display options, and other email options. Scroll down through this tab to view the different options.

General Section

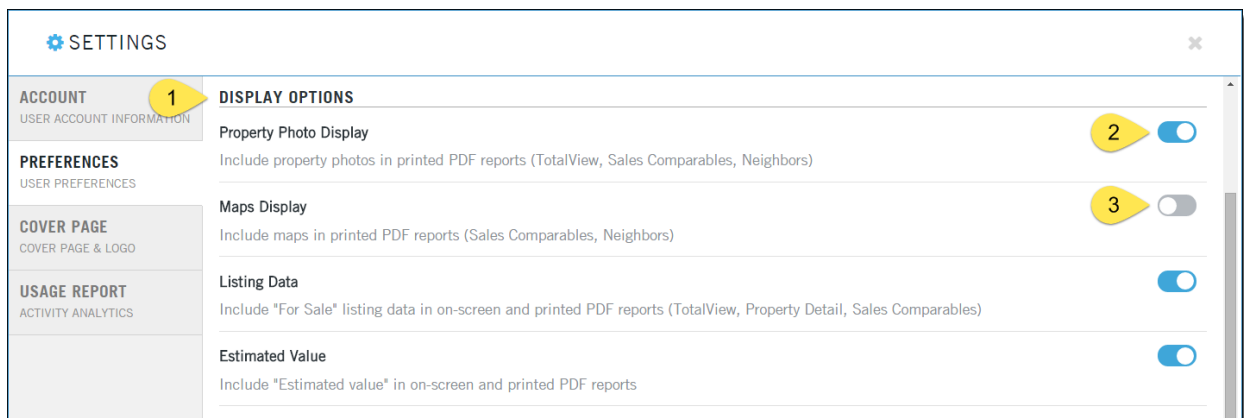
The Order Portal allows ordering batches of reports and provides email notification to the user. The frequency of the notification emails can be set for once or twice a day (default) and weekly (1). Click the toggle switch to deactivate the emails entirely (2).



If research focuses a great deal in one county, a default county can be setup (3). This affects the Advanced Search feature so that the default county is automatically setup thereby removing a step for the user.

Display Options

Selected reports can have specific information (1) hidden for compliance or regulatory purposes. This might include hiding the property photos or estimated value from the report. Simply toggle the switch on (2) or off (3) to display or hide the information.



Report Options

The options in this section affect the Property Detail, Transaction History and Sales Comparable reports.

SETTINGS

ACCOUNT
USER ACCOUNT INFORMATION

PREFERENCES
USER PREFERENCES

COVER PAGE
COVER PAGE & LOGO

USAGE REPORT
ACTIVITY ANALYTICS

REPORT OPTIONS

1 **Property Detail Autoload**

Automatically order and display a Property Detail Report with each property search

2 **Transaction History Basic Report Format**

Display report by owner
 Display report by date

Transaction History Full Report Format

Display report by owner
 Display report by date

3 **Sales Comparable Defaults**

of prior months to search Max. # of comps. to return

Search Radius Living area difference +/-%

4 **PDF Report Display Format**

Display format for comparable properties on PDF printed reports

Full property detail record (37 fields) Short property detail record (18 fields)

Property Detail Autoload

When a property is selected, the Property Detail report (1) can be set to load automatically.

NOTE: Enabling this option may incur a charge as it is effectively ordering the report automatically. Check with your contract administrator or company TitleFlex administrator before enabling this feature.

Transaction History Report Formats – Basic and Full

Both Transaction History reports can be setup to display the documents either in chronological date order or grouped by owner and then by type (liens and conveyances).

Display by Owner is the default as shown. You can change the default display by selecting the radio button for displaying the report in date order.

PREFERENCES
USER PREFERENCES

Transaction History Basic Report Format

Display report by owner
 Display report by date

Transaction History Full Report Format

Display report by owner
 Display report by date

Current Owner: Brown [redacted]
 Vesting:
 1994 - Present

LIENS									
Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
06/27/2007	Trust Deed/Mortgage		\$320,000	Salazar [redacted]	Washington Mutual FSB	Conventional	Var /		2007.406267
12/07/2005	Trust Deed/Mortgage		\$295,000	Franco [redacted]	World Savings	Conventional	Var /		2005.975794
12/17/2004	Trust Deed/Mortgage		\$53,000	Franco [redacted]	World Savings	Conventional	Var /		2004.1120823
06/28/2004	Trust Deed/Mortgage		\$25,000	Salazar [redacted]	World Savings Bank	Conventional	Var /		2004.584082
05/02/2003	Trust Deed/Mortgage		\$215,000	Salazar [redacted]	World Savings Bank	Conventional	Var /		2003.501424
12/31/2001	Trust Deed/Mortgage		\$197,000	Salazar [redacted]	AAMES Home Loan	Conventional	Fix /		2001.959193
01/20/1994	Trust Deed/Mortgage	✓	\$160,550	Franco [redacted]	Newport Pacific Funding Corp	Conventional	Fix /		

CONVEYANCES									
Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #	
01/20/2010	01/06/2011					Brown [redacted]	Salazar [redacted]	2011.11557	
04/04/2003	05/02/2003				Commonwealth Land Title	Salazar [redacted]	Salazar [redacted]	2003.501423	
12/11/2001	01/08/2002					Salazar [redacted]	Salaz	2002.13423	
12/03/2001	12/31/2001					Salazar [redacted]	Fran	2001.959192	
12/23/1993	01/20/1994	✓	\$169,000	Full Value	Orange Coast Title	Franco [redacted]	Jones [redacted]	1994.45239	

Prior Owner: Jones [redacted]
 Unknown - 1994

LIENS									
Date	Type	Verified	Amount						
11/14/1991	Trust Deed/Mortgage		\$17,529						

Report Grouped by Owner

Note the Current Owner and Prior Owner sections

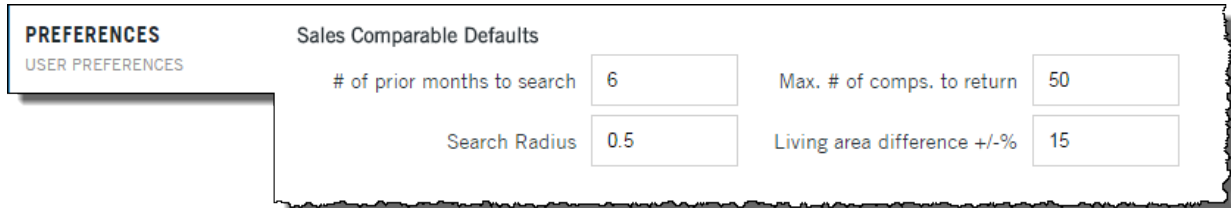
The same Transaction History report ordered chronologically.

Current Owner: Brown [redacted] [View report in Owner format](#)
 Vesting:
 1994 - Present

<input type="checkbox"/>	Date	Type	Amount	Borrower(s)	Lender	Buyer	Seller	+ Details
<input type="checkbox"/>	01/06/2011	Sale				Brown [redacted]	Salazar [redacted]	+
<input type="checkbox"/>	06/27/2007	Finance	\$320,000	Salazar [redacted]	Washington Mutual FSB			+
<input type="checkbox"/>	12/07/2005	Finance	\$295,000	Franco [redacted]	World Savings			+
<input type="checkbox"/>	12/17/2004	Finance	\$53,000	Franco [redacted]	World Savings			+
<input type="checkbox"/>	06/28/2004	Finance	\$25,000	Salazar [redacted]	World Savings Bank			+
<input type="checkbox"/>	05/02/2003	Sale				Salazar [redacted]	Salazar [redacted]	+
<input type="checkbox"/>	05/02/2003	Finance	\$215,000	Salazar [redacted]	World Savings Bank			+
<input type="checkbox"/>	01/08/2002	Sale				Salazar [redacted]	Salaz	+
<input type="checkbox"/>	12/31/2001	Finance	\$197,000	Salazar [redacted]	AAMES Home Loan			+
<input type="checkbox"/>	12/31/2001	Sale				Salazar [redacted]	Fran	+
<input type="checkbox"/>	01/20/1994	Sale	\$169,000			Franco [redacted]	Jones [redacted]	+
<input checked="" type="checkbox"/>	01/20/1994	Finance	\$160,550	Franco [redacted]	Newport Pacific Funding Corp			+
<input type="checkbox"/>	11/14/1991	Finance	\$17,529	Jones [redacted]	First Interstate Bank Californ			+

Sales Comparable Defaults

A Sales Comparable will use the search radius, prior months, living area and number of returns as shown in the Preferences.



PREFERENCES		Sales Comparable Defaults	
USER PREFERENCES			
# of prior months to search	6	Max. # of comps. to return	50
Search Radius	0.5	Living area difference +/-%	15

Modification of these defaults will change the parameters used by the Sales Comparable reports for all future comparable reports run by that user.

PDF Report Display Format

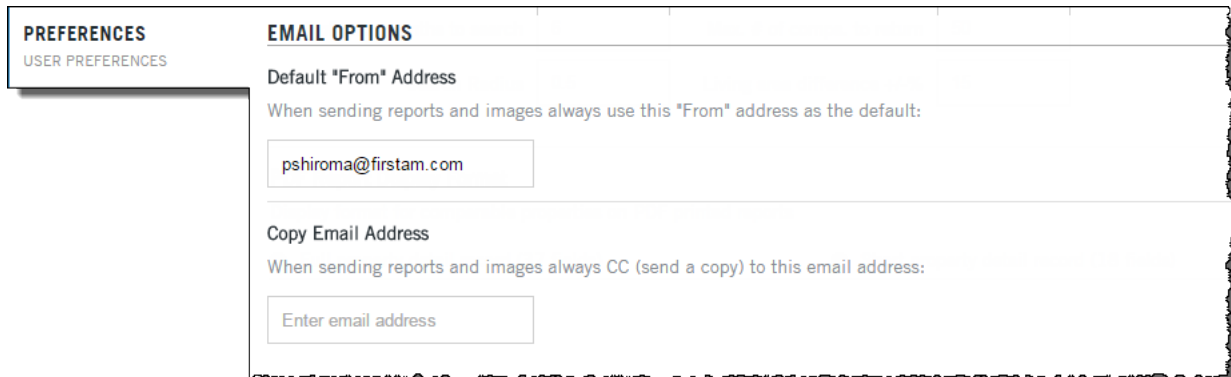
This option allows the user to change the PDF output of the Property Detail Report. Some states restrict information under certain circumstances. Check with your compliance or underwriting unit for more information.



PREFERENCES		PDF Report Display Format	
USER PREFERENCES			
Display format for comparable properties on PDF printed reports			
<input checked="" type="radio"/> Full property detail record (37 fields)	<input type="radio"/> Short property detail record (18 fields)		

Email Options

The users can now specify a “from” address as well as automatically copy the email to another recipient using the email options shown here.



PREFERENCES		EMAIL OPTIONS	
USER PREFERENCES			
Default "From" Address			
When sending reports and images always use this "From" address as the default:			
<input type="text" value="pshiroma@firstam.com"/>			
Copy Email Address			
When sending reports and images always CC (send a copy) to this email address:			
<input type="text" value="Enter email address"/>			

Usage Report Tab

The last tab allows a user to view, track and export their usage by month (1, 3). You can export usage for the selected month into a csv file (2) by clicking Export Details.

SETTINGS

ACCOUNT
USER ACCOUNT INFORMATION

PREFERENCES
USER PREFERENCES

COVER PAGE
COVER PAGE & LOGO

USAGE REPORT
ACTIVITY ANALYTICS

USAGE REPORTS

1 January 2017 EXPORT DETAILS 2

Date	TotalView Report
1/3/2017	1
Total Request	1
Total Amount	\$0.00
Grand Total	\$0.00

3

Note: Usage and pricing for Flood, Ownership & Encumbrance and Valuation and Review products are not available in this report.