



TitleFlex
by Data Trace

DOCUMENT RETRIEVAL

Rev. 201512

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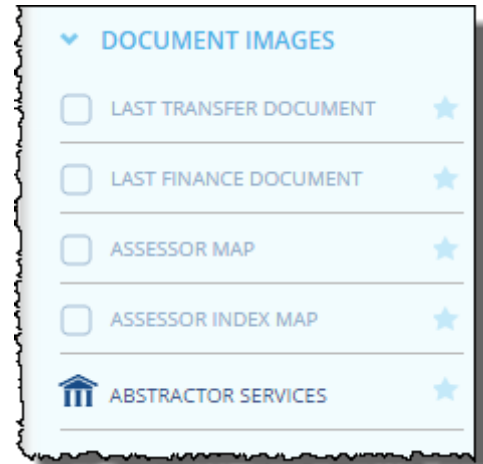
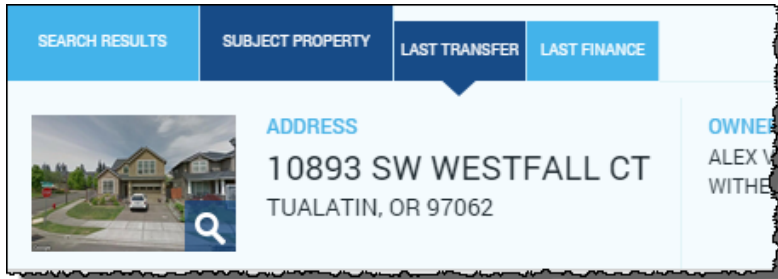
Overview

Document images can be retrieved through several methods in TitleFlex. 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:

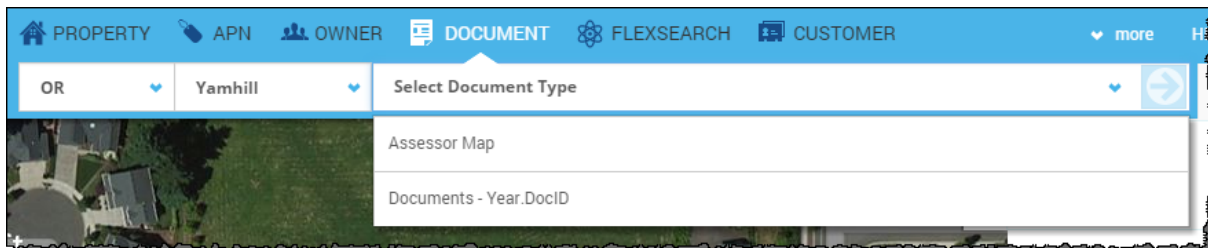
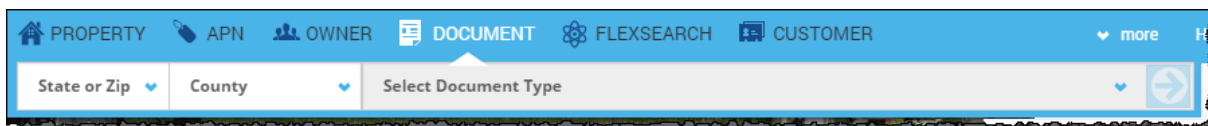
After locating the subject property and selecting a customer, if necessary, open the Document Images section of the Available Reports panel. Make your selection and click Order.

Documents will be opened in a tab to the right of the Subject Property Tab.

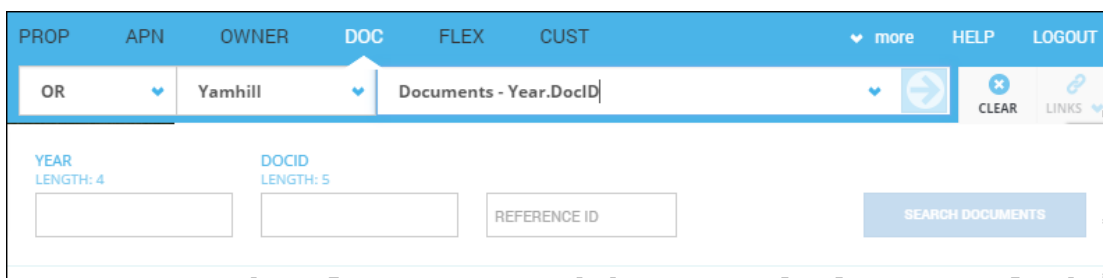


Document Search:

If you have the document number, the document can be retrieved through the Document Search feature in the search bar. Select the State, county and document type.

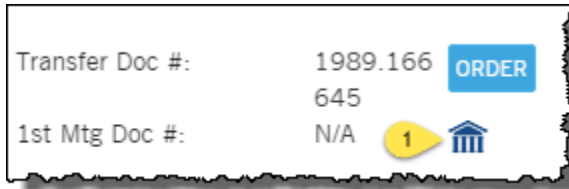



The Search Panel will open. Enter the document number and click Search Documents



Through Reports:

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



Transfer Doc #: 1989.166 645 [ORDER](#)
1st Mtg Doc #: N/A 1 

In the Property Detail report, you can click Order next to the document.

The courthouse icon is for the abstractor service(1).

In the Transaction History, select the document by clicking in the checkbox next to the document and click Order Selected.

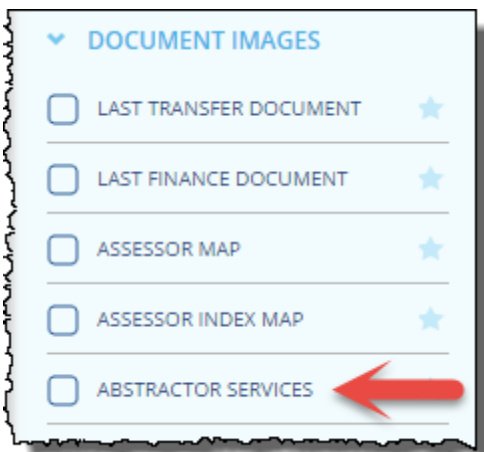







<input type="checkbox"/>	06/08/1992	Refinance	\$42,000	Miller Brenda	Avco Financial Svcs So Califor
<input type="checkbox"/>	04/19/1990	Refinance	\$23,000	Miller B	Avco Financial Svcs So Califor
<input type="checkbox"/>	08/29/1989	Resale	\$80,000	Miller Brenda	Glendale Federal Bank

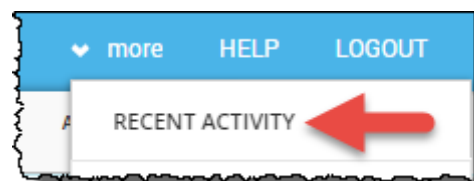
[ORDER](#)


Abstractor Services:

Abstractor Services allow you to request that an individual be sent out to perform a manual search of county records in the event that the document is unavailable. Click on the Abstractor button and complete the information. If the document is found, it will be returned to you in the More > Recent Activities dialog > Abstractor Services.



- DOCUMENT IMAGES
 - LAST TRANSFER DOCUMENT 
 - LAST FINANCE DOCUMENT 
 - ASSESSOR MAP 
 - ASSESSOR INDEX MAP 
 - ABSTRACTOR SERVICES 



- more [HELP](#) [LOGOUT](#)
- RECENT ACTIVITY 

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 **4**

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 for document information. 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 (MM/DD/YYYY)
- DOCUMENT RECORDING DATE (MM/DD/YYYY)
- ORIGINAL MORTGAGE DATE (MM/DD/YYYY)
- ORIG. MORTGAGE RECORDING DATE (MM/DD/YYYY)
- BORROWER NAME (FIRST & LAST OR COMPANY/TRUST)
- ORIGINAL MORTGAGE AMOUNT
- ORIGINAL LENDER NAME
- TRANSFER DATE (MM/DD/YYYY)
- 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.

Transfer Doc #:	1989.166	ORDER
	645	
1st Mtg Doc #:	N/A	 

DOCUMENT ID	COUNTY	
<input type="text"/>	<input type="text" value="CONTRA COSTA"/>	
STREET ADDRESS		
<input type="text" value="1300 CORTE DE LOS VECINOS"/>		
CITY	STATE	ZIP
<input type="text" value="WALNUT CREEK"/>	<input type="text" value="CA"/> 	<input type="text" value="94598"/>
REFERENCE		
<input type="text"/>		


All other functionality remains the same.

Print, Save and Email:

All documents can be saved, printed or emailed.



If you have selected multiple documents (and reports), you can select which ones to print, save or email. Simply deselect the documents (or reports) you do not wish to save, print or email.

 PRINT REPORTS ✕

3036 KILLYBROOKE LN , COSTA MESA, CA 92626

Include My Notes Include Shared Notes

Transaction History Full

Last Transfer Document

Last Finance Document

Document 1 - 2008.454533

Document 2 - 2007.343819

CANCEL PRINT

This functionality is the same for all three services.

Workflow Tips:

There might be times when you need to order documents for multiple properties at a time. DataTree supports this ability for up to 20 properties at a time.

For example, after you've generated your list of properties, open the Document Images section on the report panel, select Last Transfer Document, and click Order.

The screenshot shows the DataTree interface with search results and document image selection options. The search results table is as follows:

ADDRESS	OWNER	APN
11660 ARROYO AVE, SANTA ANA, CA 92705	BOTHERAS FAMILY TRUST	502-021-16
11664 ARROYO AVE, SANTA ANA, CA 92705	LELAND L MEANS KIMBERLY L GARRISON M...	502-021-33
11674 ARROYO AVE, SANTA ANA, CA 92705	BROD FAMILY TRUST	502-021-32
11542 CIELO PL, SANTA ANA, CA 92705	GARRY CLIFFORD HEATH CLARA YVONNE HE...	502-021-19
11572 CIELO PL, SANTA ANA, CA 92705	GARY L BASTIEN	502-021-27
1341 LA LOMA DR, SANTA ANA, CA 92705	TAMER ABED	502-021-30

The interface also shows a sidebar with document image selection options:

- PROPERTY REPORTS
- DOCUMENT IMAGES
 - LAST TRANSFER DOCUMENT
 - LAST FINANCE DOCUMENT
 - ASSESSOR MAP
 - ASSESSOR INDEX MAP
 - ABTRACTOR SERVICES
- VALUATION REPORTS
- ANALYTICS / OTHER

At the bottom, there is a toolbar with buttons for BACK, NEXT, NOTES, SAVE, PRINT, E-MAIL, MULTI, LABELS, EXPORT, and a large green ORDER button. A red arrow points to the ORDER button.

You will be presented with a dialog box indicating that you can order the document (or report) for all selected properties. Click Order.

The dialog box is titled "WHICH PROPERTY OR PROPERTIES SHOULD THIS ORDER APPLY TO?". It contains the following text:

You have not selected a subject property. If you would like to order a report for a single property, please select CANCEL ORDER and select a subject property from your results.

This order is for ALL 11 SELECTED properties:

There are two buttons: "ORDER ALL" and "CANCEL ORDER". A red arrow points to the "ORDER ALL" button.

Now you can use the arrow keys or click on a property to view the Last Transfer Document on each property.

The navigation bar shows "1 OF 11 PROPERTIES" and "BACK" and "NEXT" buttons.