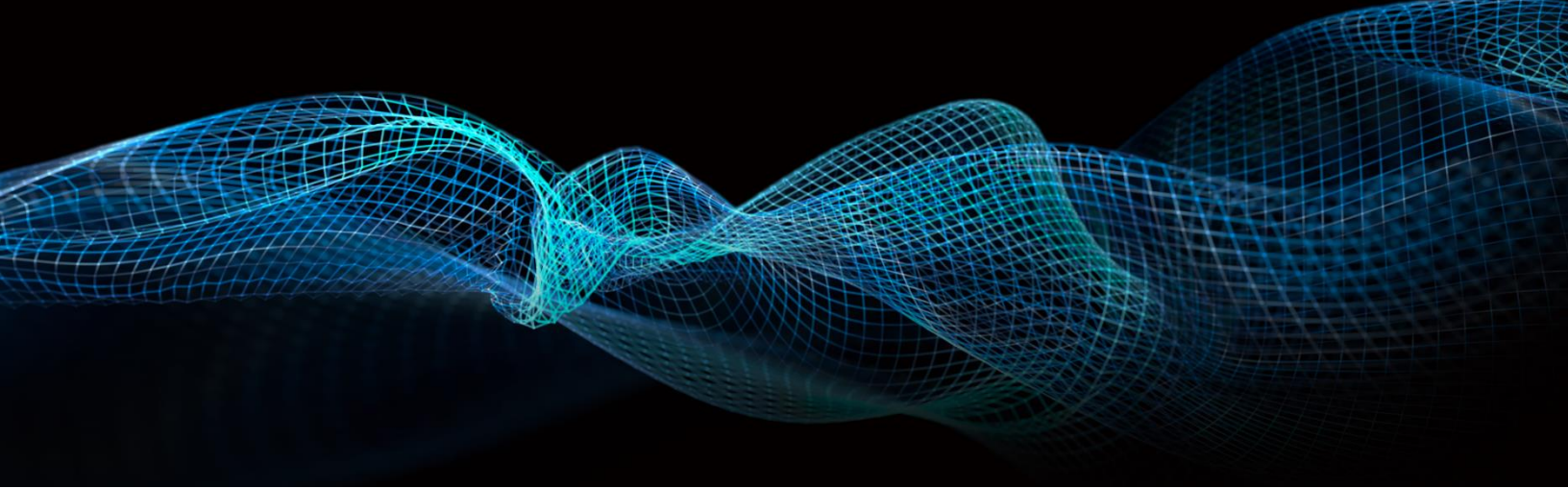


Innovations to GO BEYOND  
TITLE DATA and AUTOMATION



# IMPORTING FARMS IN TITLEFLEX

Rev. 201904

## Overview

The import farm feature allows the Title Customer Services Representative to upload a list of properties provided by their customer and quickly create a saved farm from that list. This greatly reduces the amount of time it takes to create a farm from a list of specific addresses or APNs. Using the Upload Farm feature also makes it easy to import farms generated in other software platforms.

## Before We Begin:

The import must be in Excel (\*.xlsx file format is required). The imported records must be in the following layout:

	A	B	C	D	E	F	
1	Street Address	City	State	ZIP	County	APN	
2							

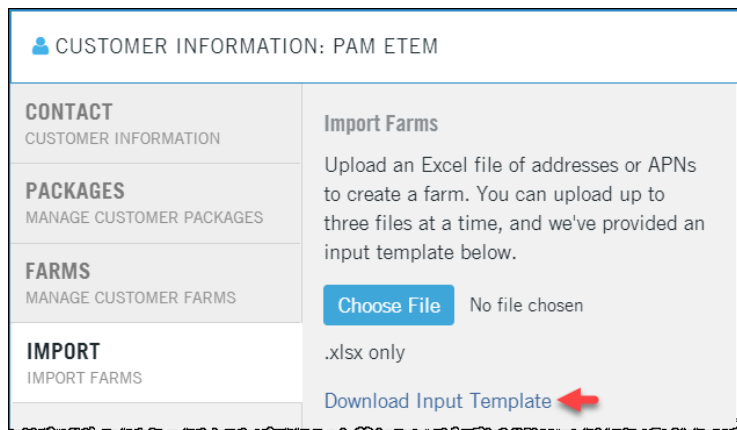
### Include:

Address, City, State and Zip


OR

APN, County and State

To download the template, go to the Customer Information card > Import tab click the Download Input Template link. sure to format the file before proceeding to the import steps.



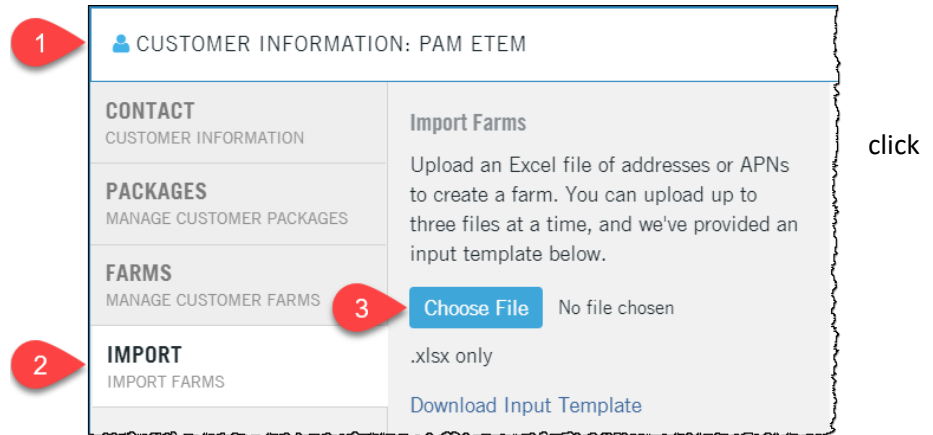
CUSTOMER INFORMATION: PAM ETEM

<b>CONTACT</b> CUSTOMER INFORMATION	<b>Import Farms</b> Upload an Excel file of addresses or APNs to create a farm. You can upload up to three files at a time, and we've provided an input template below.  <a href="#">Choose File</a> No file chosen  .xlsx only  <a href="#">Download Input Template</a> 
<b>PACKAGES</b> MANAGE CUSTOMER PACKAGES	
<b>FARMS</b> MANAGE CUSTOMER FARMS	
<b>IMPORT</b> IMPORT FARMS	

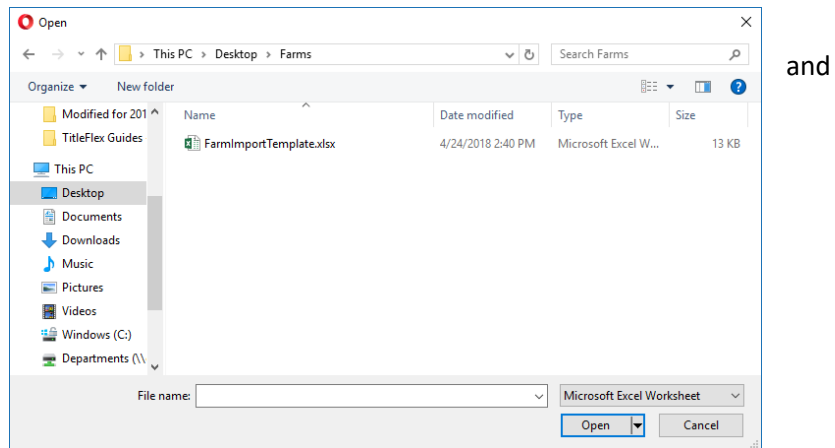
and  
Make

## Import Farms

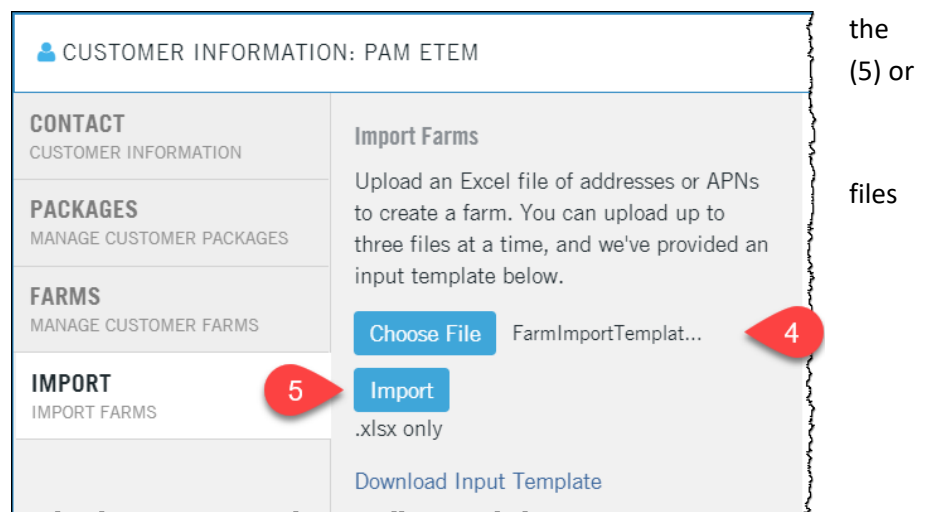
To import a farm for a customer, start by opening the customer's contact card in TitleFlex (1). In the contact card Import (2). Click the Choose File button (3) to select the customer's file.



In the Open dialog box, navigate to the customer's farm Excel file, select it, click Open.



Your file will appear (4) next to Choose File button. Click Import click Choose File again to select additional files to import. The service will process up to three at a time.



Your file will be uploaded and checked for address errors which will be listed in an Import Report (6) when the upload is complete. There is no limit to the number of imported farms.

**CUSTOMER INFORMATION: PAM ETEM**

<b>CONTACT</b> <small>CUSTOMER INFORMATION</small>	<b>Import Farms</b> Upload an Excel file of addresses or APNs to create a farm. You can upload up to three files at a time, and we've provided an input template below.	<b>File Uploaded As</b>	<b>Status</b>
<b>PACKAGES</b> <small>MANAGE CUSTOMER PACKAGES</small>	<input type="button" value="Choose File"/> No file chosen .xlsx only <input type="button" value="Download Input Template"/>	FarmImportTemplate_04242018150331	Completed <span style="color: red; font-weight: bold;">6</span> <a href="#">Import Report</a>
<b>FARMS</b> <small>MANAGE CUSTOMER FARMS</small>			
<b>IMPORT</b> <small>IMPORT FARMS</small>			

Clicking the Import Report will download an Excel file with the results of the import. If there are any addresses that did not upload successfully, they will be shown (7) in the file.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	INPUT APN	INPUT County	INPUT Address	INPUT City	INPUT State	INPUT ZIP	Status	Reason	Property Address	City	State	ZIP	
2	RIVERSIDE		43683 DE LUZ RD	TEMECULA	CA	92590	Passed		43683 DE LUZ RD	TEMECULA	CA	92590	
3	RIVERSIDE		45900 VIA TORNADO	TEMECULA	CA	92590	Passed		45900 VIA TORNADO	TEMECULA	CA	92590	
4	RIVERSIDE		43995 MAHLON VAIL RD	TEMECULA	CA	92592	Passed		43995 MAHLON VAIL RD	TEMECULA	CA	92592	
5	RIVERSIDE		43975 MAHLON VAIL RD	TEMECULA	CA	92592	Passed		43975 MAHLON VAIL RD	TEMECULA	CA	92592	
6	RIVERSIDE		29648 SOLANA WAY	TEMECULA	CA	92591	Passed		29648 SOLANA WAY	TEMECULA	CA	92591	
7	RIVERSIDE		30277 VIA BRISA	TEMECULA	CA	92592	Passed		30277 VIA BRISA	TEMECULA	CA	92592	
8	RIVERSIDE		31440 SWEETWATER CIR	TEMECULA	CA	92591	Passed		31440 SWEETWATER CIR	TEMECULA	CA	92591	
9	RIVERSIDE		45687 VIA PUEBLA	TEMECULA	CA	92592	Passed		45687 VIA PUEBLA	TEMECULA	CA	92592	
10	RIVERSIDE		45675 VIA PUEBLA	TEMECULA	CA	92592	Passed		45675 VIA PUEBLA	TEMECULA	CA	92592	
11	RIVERSIDE		31374 POLO CREEK RD	TEMECULA	CA	92591	Passed		31374 POLO CREEK RD	TEMECULA	CA	92591	
12	RIVERSIDE		39755 GREEN OAKS DR	TEMECULA	CA	92592	Passed		39755 GREEN OAKS DR	TEMECULA	CA	92592	
13	RIVERSIDE		31238 BRUSH CREEK CIR	TEMECULA	CA	92591	Passed		31238 BRUSH CREEK CIR	TEMECULA	CA	92591	
14	RIVERSIDE		31233 SKYLINE DR	TEMECULA	CA	92591	Passed		31233 SKYLINE DR	TEMECULA	CA	92591	
15	RIVERSIDE		45365 BUENA LOMA RD	TEMECULA	CA	92590	Passed		45365 BUENA LOMA RD	TEMECULA	CA	92590	
16	RIVERSIDE		39129 RIMROCK RANCH RE	TEMECULA	CA	92591	Passed		39129 RIMROCK RANCH RE	TEMECULA	CA	92591	
17	RIVERSIDE		43750 VIA CIELO	TEMECULA	CA	92590	Rejected	Multiple Properties Found					
18	RIVERSIDE		38940 MANNING RD	TEMECULA	CA	92592	Passed		38940 MANNING RD	TEMECULA	CA	92592	
19	RIVERSIDE		45798 AMBARA CT	TEMECULA	CA	92592	Passed		45798 AMBARA CT	TEMECULA	CA	92592	

The customer's farm will now be part of their contact information and can be renamed or deleted in the Farms tab. Finally, the customer's farm can be accessed through the Farms select and additional filters applied, packages created, records exported, or labels printed.

**Pam Etem**  
Team Etem  
714-406-3838

**FARMS**

Click or Type

Eichler Homes

FarmImportTemplate\_04242018150331

Garden Grove Addresses

**Automated Valuations**

drop

## Managing Existing Farms

You can click on the name of the farm to run the list (1), rename the farm (2), or delete it (3) by opening the customers' information card and clicking the Farm tab.

Farm	Last Modified	Modified By
<a href="#">Eichler Homes</a> <span>1</span> <a href="#">Rename</a> <span>2</span>	04/24/2018	Paul Shiroma <a href="#">Delete</a> <span>3</span>
<a href="#">FarmImportTemplate_04242018150331</a> <a href="#">Rename</a>	04/24/2018	Paul Shiroma <a href="#">Delete</a>
<a href="#">Garden Grove Addresses</a> <a href="#">Rename</a>	03/09/2017	Paul Shiroma <a href="#">Delete</a>

If you need to update or edit the criteria for a farm, run the farm and click the Edit (4) link. Make sure to resave your modified farm (5).

**SEARCH RESULTS** [x Clear Search](#)

**284** results found (284 selected)

[Edit Advanced Search Criteria](#) 4 [Save Farm](#) 5