Innovations to GO BEYOND

TITLE DATA and AUTOMATION

MANAGING AND EXPORTING FARMS:

SAVING AND MODIFYING FARMS, MULTI-LINE REPORTS, LABELS, AND EXPORTS

Rev. 201904

TitleFlex™
by DataTrace®

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Overview

This document covers saving, renaming, and deleting farms and the different export options available.

See the Advanced Search guide for a detailed description of the farming filters.

Before you Begin

This document assumes you have customer contacts built and ready to be used in the Customer Center.

To open up a customer contact card, click the Customer Center link (1) and click on an existing customer (2), search for an existing customer (3), or create a new customer entry (4).
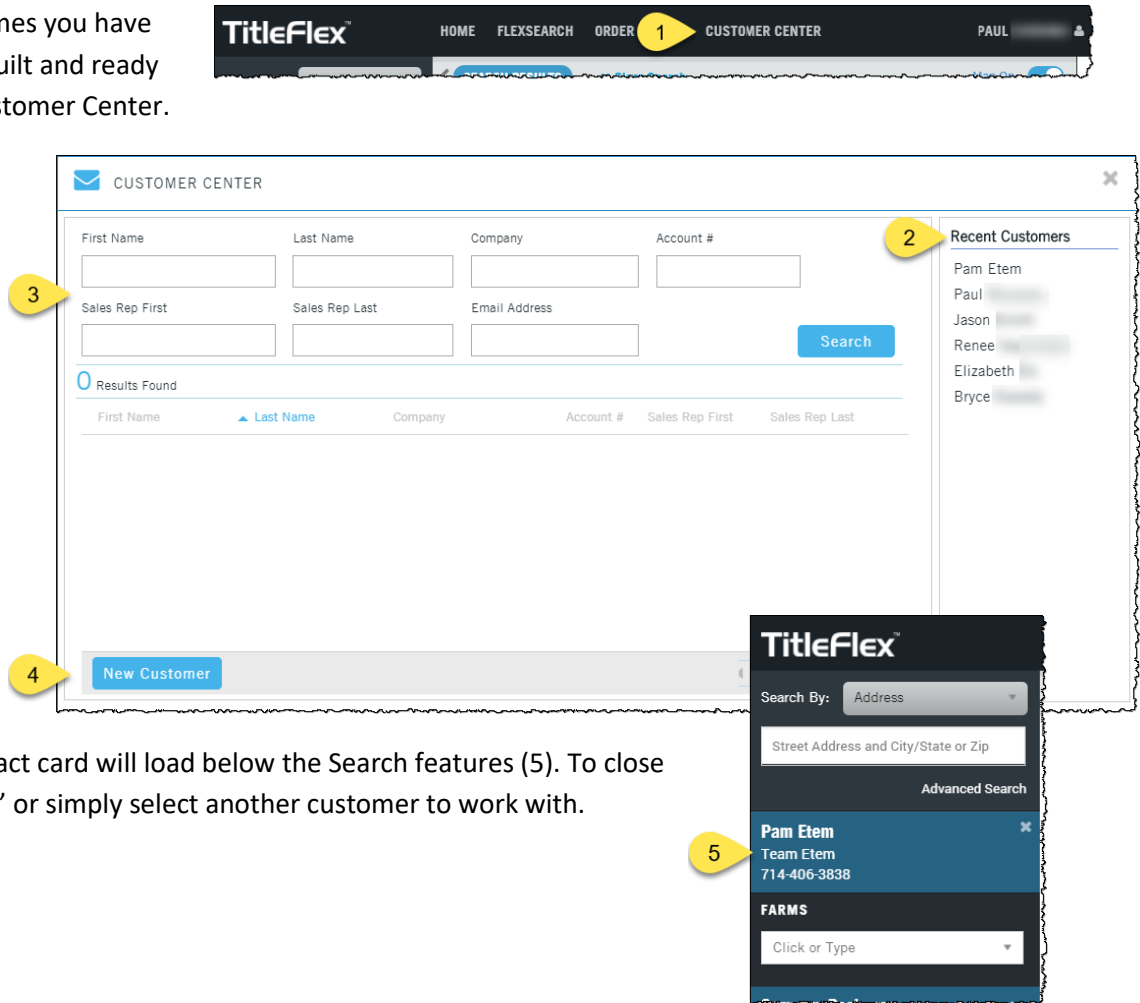
The customer's contact card will load below the Search features (5). To close the card, click the "x" or simply select another customer to work with.
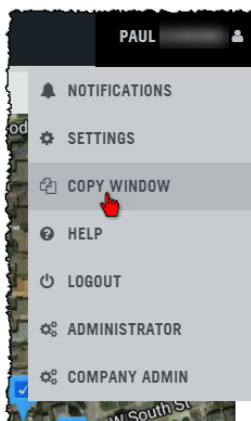

TIP: When you have to manage more than one customer request at a time, use the Copy Window feature in the profile menu. You can open multiple TitleFlex instances, one for each customer.

Saving and Managing Farms:

After creating your farm, click the Save Farm button (1) to save the filter criteria for your customer. Once saved, the Farm will become part of the FARMS list for that customer (2).

NOTE: If you do not see the Save Farm link, make sure you open a customer contact.

You can reuse any farm as well as modify the criteria should the client require changes by selecting the farm from the list (2) and clicking Edit Advanced Search Criteria (3).
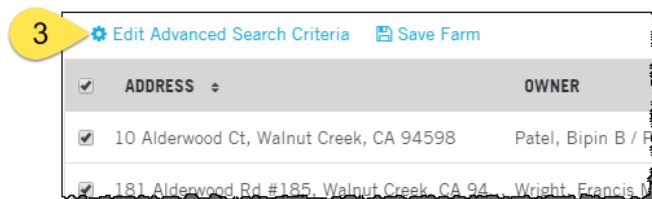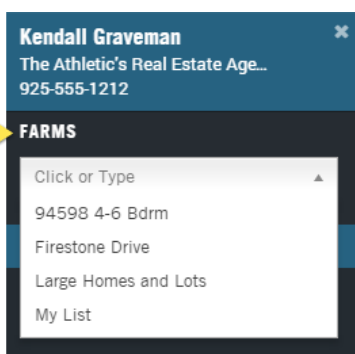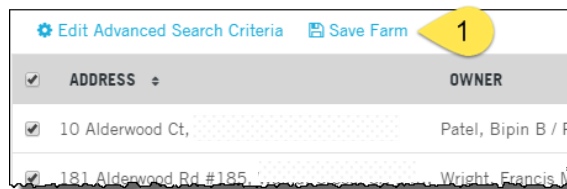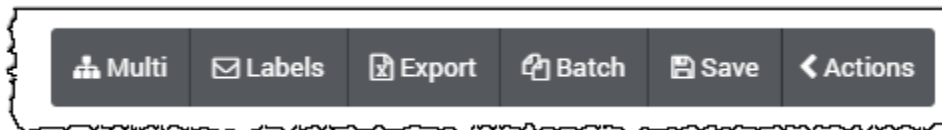
Rename or delete a saved farm by clicking on the customer contact card (4) and selecting the Farms tab (5-8).
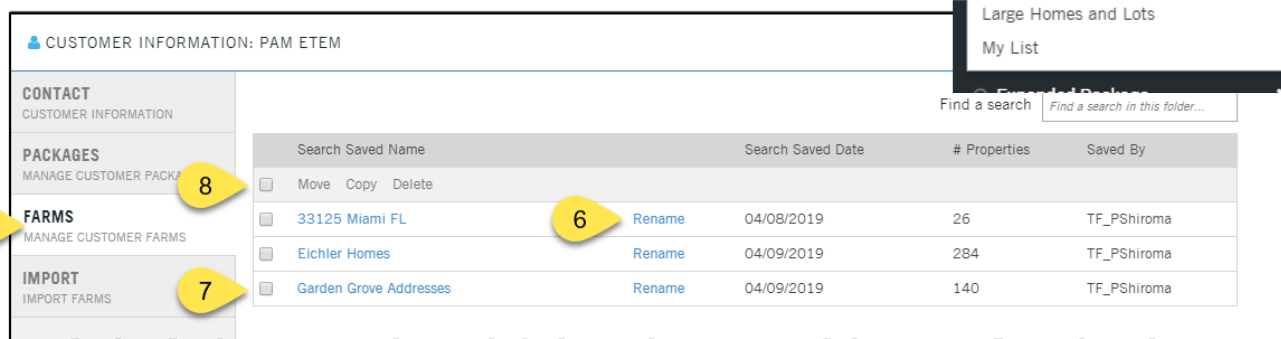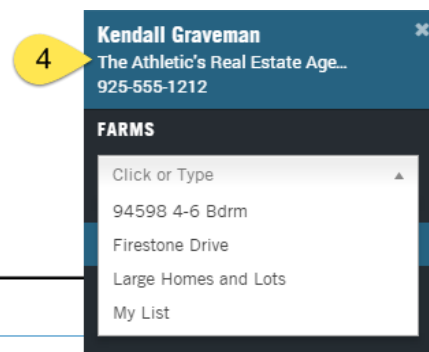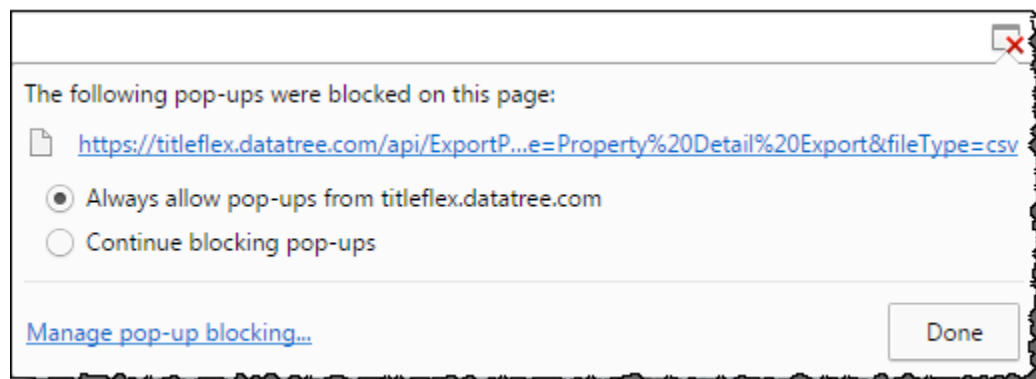
Exports:

After generating your farm, you can create multiline reports, labels, export the records into a CSV file, run them as a batch job to append additional information or save the search to the Recent Activities.

TIP: All exports use a popup window. Please make sure popup blockers are disabled. The screenshot shows Chrome's alert and how to disable the popup blocker. Other browsers function differently, please check with your desktop support for more information.

Multiline Reports (Multi):

Turning your list into a multi-line report.

Select the Multi (line) option, select a multiline report and click Order.

The Order Confirmation dialog box will appear. In this box, you can add a cover page, as well as the map showing the pins designating the properties included in the farm. The Cover Page Note will include your custom text on the cover page. Note that the Notes Tag must be included in the Cover Page Template for this information to be used. See the Cover Page Guide for additional information.
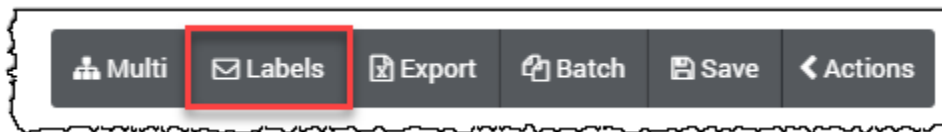

Click the Print or View to the far right to print or view the document.

Labels:

Creating a PDF file for printing Avery labels.

Clicking the Labels button to open the Order Labels dialog box. You can select which address to mail to, how to print the owner name, do not mail and deduplication options, sort order, and the case (proper or all capitals). Three common Avery labels are included. Make your selections and click Order at the bottom.

Barbara B Corneille & Corneille Liv Trust Of 3/19/9 or Current Resident	Jonatkim Enterprises or Current Resident 627 S Manchester Ave	Stephen Roy & Terry P Miller or Current Resident 29 Atherton Ave
Tom & Terri Jamieson or Current Resident	John A & Donna J Schneider or Current Resident	Wellington S Henderson & Richard L Greene or Current Resident
Green Banker Ca Llc or Current Resident	Marcia Custodian Giusti & Yolanda Custodian Thompson	Allan Family Ca or Current Resident

Labels Continued: When printing labels, <u>your printer software and hardware will make a difference in how the labels are printed</u>. Save your labels to a convenient location, such as your desktop. From the desktop (or the download location), double-click the pdf to open the labels in Adobe Acrobat.
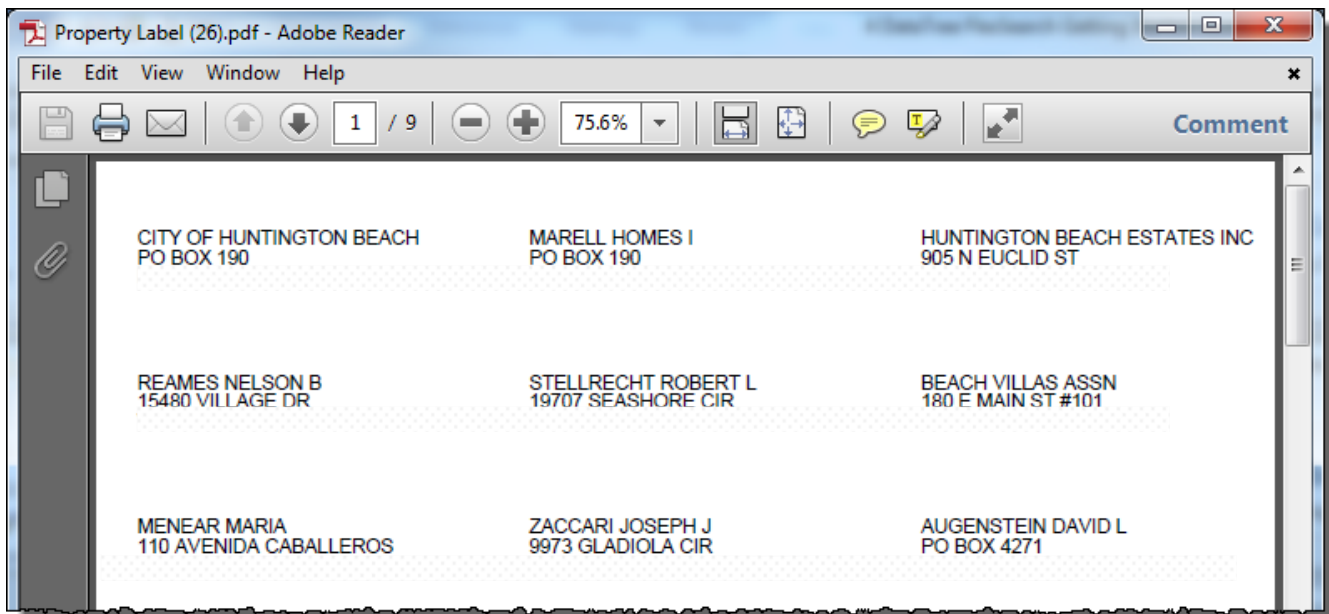
Click the Print button to open Acrobat's print dialog box.

In the Size Options section, select "Actual Size". This will ensure that the printer's software does not adjust the labels to its defaults. There will be variations between the printer hardware and the software drivers used. It is recommended that you print on plain paper to test the settings of your printer and printer's software.
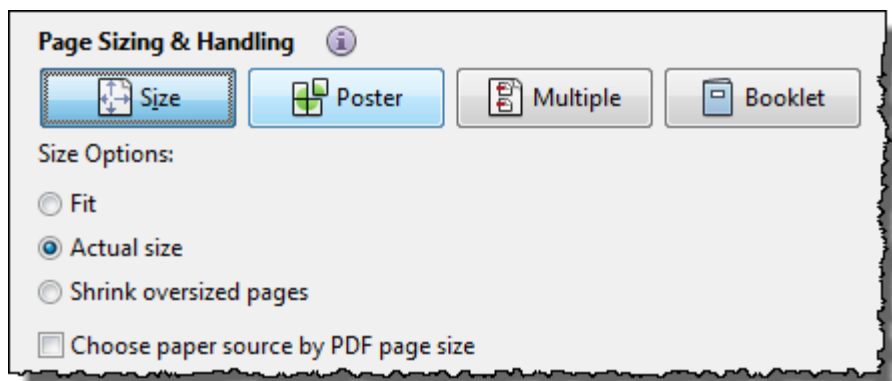
Make any other selections as appropriate and click Print.

TIP: Test several print runs on plain paper and check it against your selected label to ensure the settings are adjusted to match your printer hardware.

Export Options:

Pulling your data into a csv (Excel) file.

Three export layouts are available. To review which fields are part of the layout, click on the headers to expand the list.

- Mailing Label: This includes the essential fields necessary to create mailing labels through a mail merge, such as in Microsoft Word.
- Property Characteristics: Includes all fields from the Mailing Label export and adds the fields with the property characteristics, such as bedrooms, bathrooms, situs information, etc.
- Property Detail: This export contains every field on the Property Detail Report.

One of the first three lists must be selected (or fields from those lists selected) before you can select from the following exports. As each of the first three lists builds on the previous, there is no need to select more than one. You may select fields individually or click Select All to use all the fields in the export.

- Finance Scores: Provides the preponderance scores for Refinance, Purchase, and Equity.
- Foreclosure Detail: Does not contain address information - only foreclosure information. One of the above exports must be included if you need address, owner, or property characteristics information.
- HOA Contact: As the name implies, this provides the contact and billing information for the HOA.

- HOA Lien: Contains the information from the HOA Lien Report, including the document information and trustee.

Once you have selected the appropriate fields, enter a file name, the format (CSV is the default), and the case (all caps or upper/lower) (1). Select options for removing duplicates and the records to export (2). Finally, if you use a particular set of fields in a certain order regularly, select Save as Template (3) and you will be prompted to name this layout. Click Order to print your labels (3).

Existing templates are available in the Apply a Template (4) drop down list at the top of the Export dialog box.

Simply click on one of the template to setup the fields. If you find that one template is no longer needed, click the "x" to the right of the template name.

TIP: Chrome, Firefox and Internet Explorer all download files slightly differently. Please make sure to take note of where your browser saves downloaded files. If you are unsure, check with your IT team or Helpdesk or call DataTree Client Services at 800-708-8463.

Additional how-to guides on farming can be found in the TitleFlex User Guides on the Help and Support page.

REMEMBER: The Recent Activities section of the platform's home page will always include recently searched properties and documents as well as recently created lists or Order Portal jobs. You can quickly retrieve information for clients from here or re-run lists with cover pages for customers.

RECENT ACTIVITY

PROPERTY SEARCHES

Address	Owner	APN	Action
448 Clanton Ave, Montgomery,...	Young William C Ii	10-04-19-2-0...	View
440 Clanton Ave, Montgomery,...	Canter Robert L	10-04-19-2-0...	View
432 Clanton Ave, Montgomery,...	Bdgm Llc	10-04-19-2-0...	View
1618 Croom Dr, Montgomery, A...	Watson Nannette J	10-05-22-2-0...	View
1612 Croom Dr, Montgomery, A...	Shirley Paige	10-05-22-2-0...	View

DOCUMENT IMAGES

State	County	Doc Type	Description	Action
CA	Alameda	Document - Y...	2014.123456	View | Download

DATA EXPORT & LABELS

Order Type	File Name	Created	Properties	Expiration	Action
Labels	Avery 5160	04/03/2018	28	05/03/2018	Download
Labels	Avery 5160	04/02/2018	22	05/02/2018	Download

MULTI PROPERTY REPORTS

Report Type	Reference ID	Created	Customer	Properties	Expiration	Cover Page	Map	Action
Walking Five Lin...		04/03/2018	Pam Etem	9	04/05/2018	None ▼	☐	View | Print
Single Line Repo...		04/03/2018	Pam Etem	129	04/05/2018	None ▼	☐	View | Print
Five Line Report		04/03/2018		28	04/05/2018	None ▼	☐	View | Print
Single Line Repo...		04/02/2018		22	04/04/2018	None ▼	☐	View | Print
Market Statistic...		04/02/2018		22	04/04/2018	None ▼	☐	View | Print

SAVED SEARCHES

No Recent Saved Searches

ORDER PORTAL NOTIFICATIONS

RECENT ORDER ACTIVITY

Batch Runs

The farming list may benefit from additional information beyond the export options, such as ordering the last transfer document or a property detail report. Instead of doing this one at a time, TitleFlex includes the option to automatically send the farming list to the Batch Order Portal where documents can be order or reports run for the properties.

Clicking the Batch button will automatically upload you farm to the Order Portals New Batch Order tab. Select a document or report (1). Click on any of the headers to reveal the report options or documents. Name the batch job (2), and click Place Order … (3). The default name is the name of the report selected.

Your job (4) will appear in the View All Orders tab.

When the job is done, a Ready link will appear. Click the link to download the zip file containing your list and reports.