Innovations to GO BEYOND

TITLE DATA and AUTOMATION

CREATING AND MANAGING CUSTOMERS AND CUSTOMER PACKAGES

Rev. 201904

TitleFlex™
by DataTrace®

Customers

TitleFlex includes a Customer Center feature that allows you to manage customer contact information, save their favorite packages and farms, import their farms, and keep notes and interaction information. Using the Center, you can keep all your customers at your fingertips and all their favorite farms and packages quickly accessible.

Starting with Customers

On the search bar at the top of the TitleFlex window, click on the Customer Center (1) link to open the Customer Center.
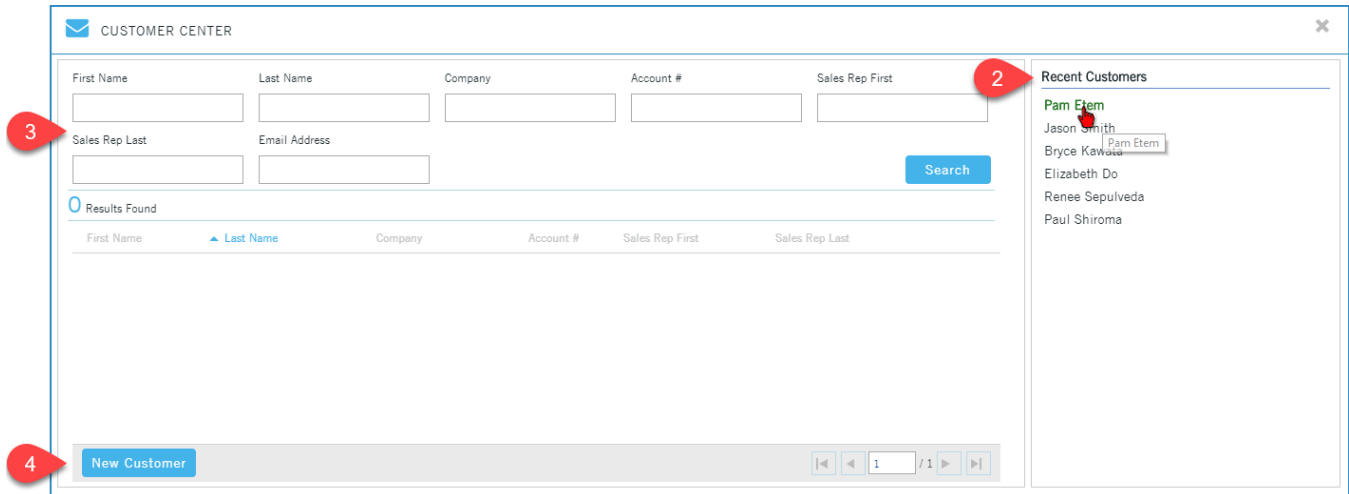
Click on a recently used customer to open their contact card (2), search for an existing customer (3), or create a new customer (4).

New Customers

To create a new customer, click the New Customer button (4) and complete the fields. Note that the Sales Rep field entries are provided by your Administrator in the Company Admin tool. Contact your company Administrator to ensure sales reps have been added. When creating a new customer, you can add the customer information along with any notes or interactions that may have occurred. Custom packages and farms can be saved after the customer is created. Click Create Customer to complete the entry.

Existing Customer

To update or modify an existing customer, click on the customer name in the recently used list (2) or, if the customer isn't showing up on the recently used list, use the filters (3) to locate them. Double-click on the customer name in the Results Found window when you locate them.

Once selected, the customer will appear in the left hand panel, as shown here (5). Note that their saved farms will appears as a drop down list.
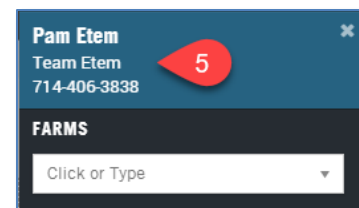
Click on the customer name (5, above) to access their customer contact card.

Once the customer contact card appears, you can create custom packages, delete Farms, add interactions, or update their contact information.

Scroll down in the contact card to add notes and interactions you have had with the customer.

Managing Customers

Once the customer is selected, any property searches, reports or documents ordered, or lists generated will be saved in the Order History section of the Customer's contact card for future reference.

This information can also be exported by your company's administrator so that the overall interactions can be tracked and services monitored for the return on investment.

Packages

Each customer can have their own set of packages unique to them. To create customer packages, click on the Packages tab (6) in the Customer window.

The company packages (7) at the top are created by your Company administrator and can be used as starting templates (8) or you can just create a new package by clicking on New Package (9).

Click on the "**>**" to open a package (10) and review the TitleFlex reports that are part of the package.

Company Packages:

Note the Company Packages (7) can be copied and used for the specific Customer.

Customer Packages:

Existing Customer Packages (11) can be modified or deleted.

Building and Modifying Packages:

Create a new package by clicking New Package (or copying a Company package), name it (1) and add reports (2) or change their order.
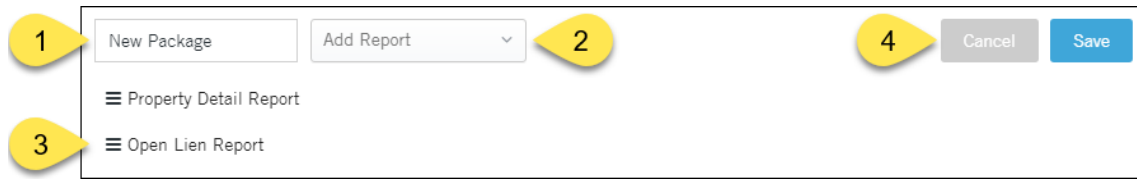
Click and drag **handle** (3) to change the order of the reports.

To remove a report, hover your mouse over the report line and an X will appear at the right. Click the X to remove the report.
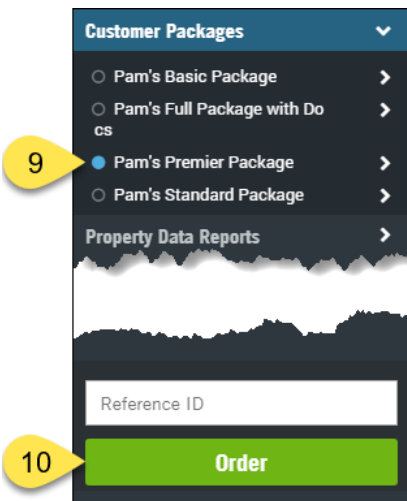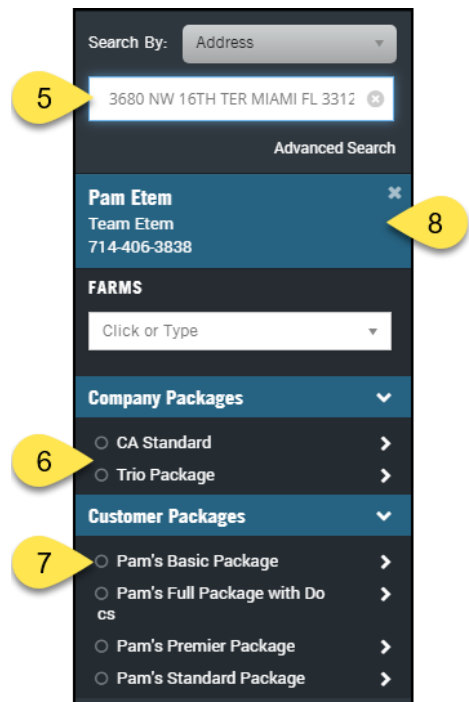
Click Save (4) when done. You can always modify them later as well.

To use any package:

Search for the subject parcel using the Address, APN, or Owner Name (5). In this example, the address was used.

After the property loads, open either the Company or Customer's Packages. (6, 7). **Remember,** the Customer's packages only show if a customer is already loaded (8).

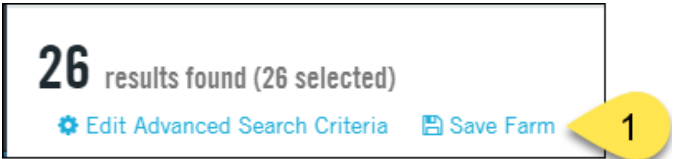Select the radio button (9) the right of the package and click the Order (10) button.

The reports from the package will load (11) and can be saved, printed, or emailed (12).
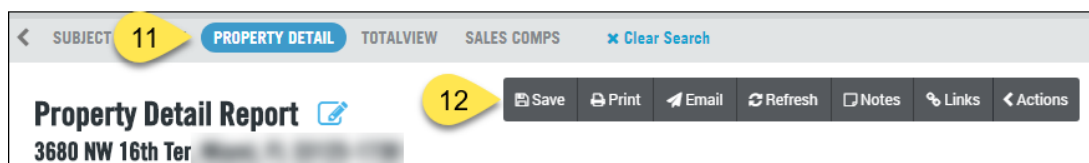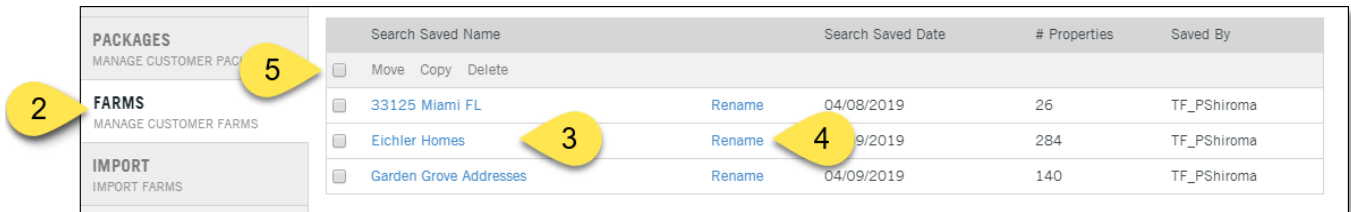

Farms

In the Advanced Search window, you can save any farm you create for your customers (1).

Farm management is handled through the customers' contact card. In the Customer contact card, click the Farms tab (2). You can rerun farms by clicking on the name (3), rename the farm (4) or Move, Copy or Delete the farm (5).
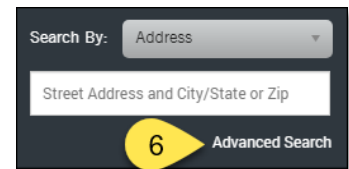
Creating new farms is handled through the Advanced Search feature (5) in the main TitleFlex window.
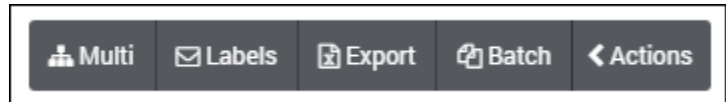
Once a farm is run or recalled and run, the list can be printed as a multi-line report, labels, exported as a csv file, or sent to the batch service to append additional information or download large number of reports.

See the Farming guides on the TitleFlex Help page for more information.