Innovations to GO BEYOND

TITLE DATA and AUTOMATION
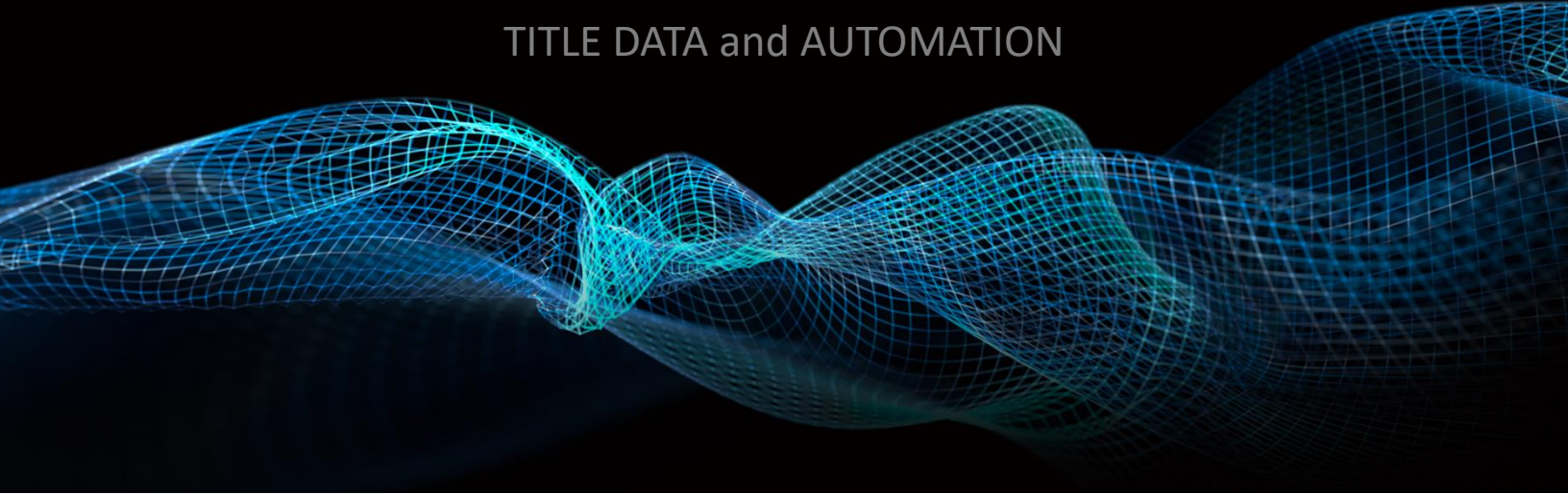
DOCUMENT RETREIVAL

Rev. 201904

**TitleFlex**™
by DataTrace®

Overview

Document images can be retrieved through several methods. 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.
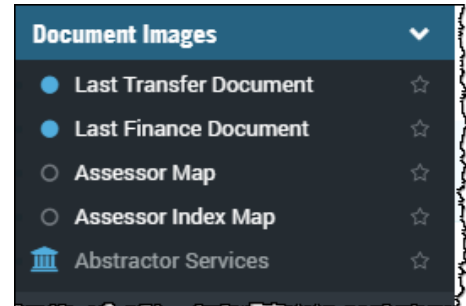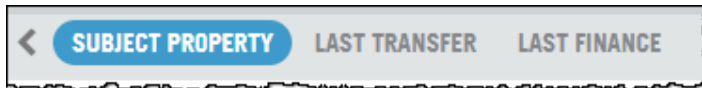
Last Transfer: This is the last conveyance document recorded on the property. It may be a full-value, arms-length transaction or a quit claim deed. It is simply the last conveyance.
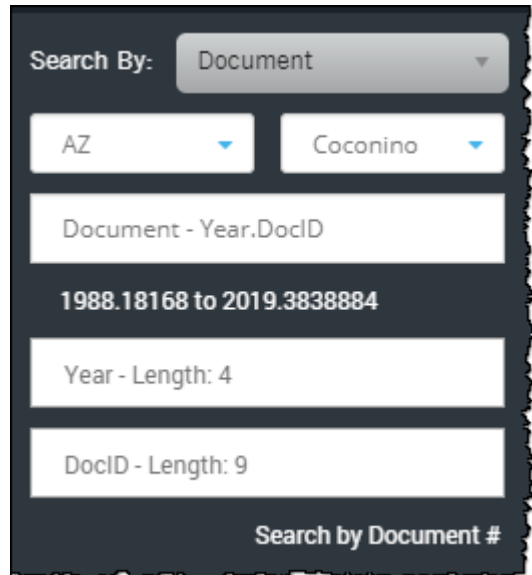
Last Finance: This is the most recent finance document and may be a purchase or junior mortgage.
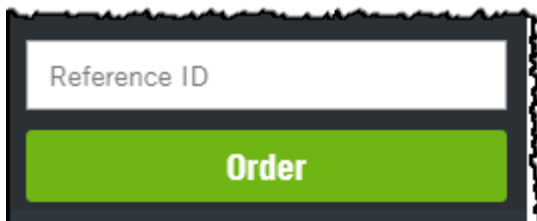
Document Search:

If you have the document number, the document can be retrieved through the Document Search feature in the search bar.
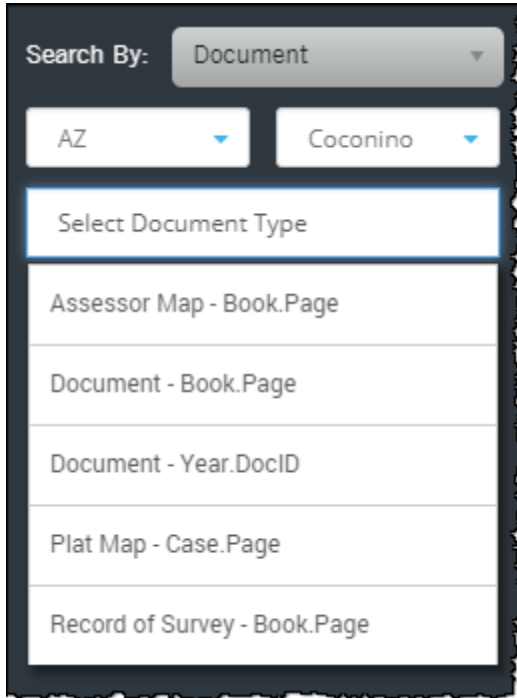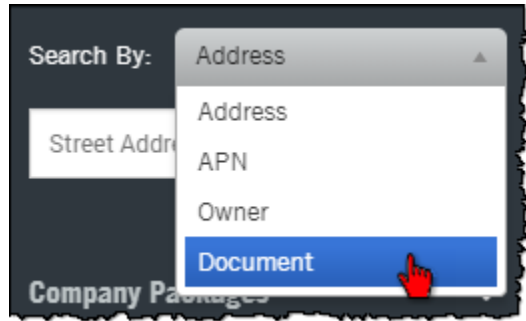
Select the State, county and document type. Document types will change as they are unique to the county.
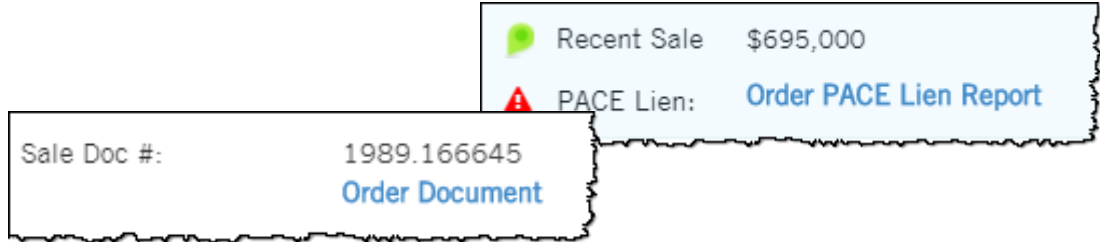

The Search Panel will open. Enter the document number and click Order at the bottom.

Through Reports:

Documents can be ordered through reports as well. The functionality for all reports is the same.

Click on the link.

Recent Sale $695,000

⚠ PACE Lien: Order PACE Lien Report
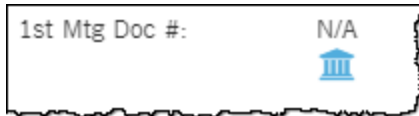
Sale Doc #:   1989.166645
Order Document

Select the checkbox next to the
document and click Order Selected.

	Date	Position / Type	Verified	Amount
☐	03/27/2007	1st / Trust Deed/Mortgage		$300,000
✓	08/09/2007	2nd / Trust Deed/Mortgage		$25,000
ORDER				

Through the Abstractor Service (click on the Courthouse Icon).
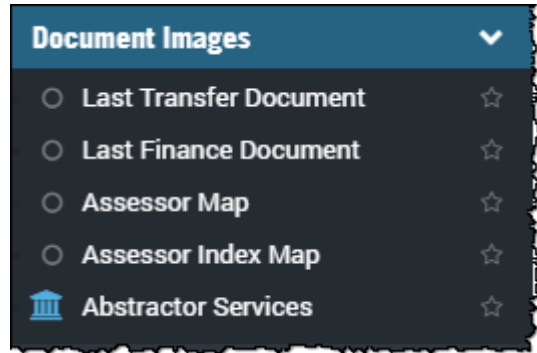
1st Mtg Doc #:   N/A
🏛

Abstractor Services:

Abstractor Services allow you to request a manual search of county records in the event that the document is unavailable. This service can be used independently of reports. Click on the Abstractor button and complete the information. If the document is found, it will be returned to you in the Order Portal.

The Abstractor Services form that will appear. Red highlighted fields are mandatory.

Document Images ⌄
- ○ Last Transfer Document ☆
- ○ Last Finance Document ☆
- ○ Assessor Map ☆
- ○ Assessor Index Map ☆
- 🏛 Abstractor Services ☆

Based upon your document type, the fields on the right will change.

🏛 ABSTRACTOR SERVICES   ✕

A Single Solution For All of 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, assignments, releases, transfers, deeds, foreclosures and more.

Select Documents
- ○ Mortgage
- ○ Latest Mortgage
- ○ Modification
- ○ Specific Assignment
- ○ Release
- ○ Notice Of Default
- ○ Notice Of Trustee Sale
- ○ NY CEMA Document
- ○ NY CEMA Full Chain
- ○ Mortgage & All Assignments
- ○ Reverse Mortgage

- ○ Grant/Warranty Deed
- ○ Last Vesting Deed
- ○ Quit Claim Deed
- ○ UCC
- ○ UCC & Downstream Filings
- ○ Power Of Attorney
- ○ Other Document

Options
- ● Full Documents
- ○ Pertinent Pages Only
- ☐ Certified Copy Request

Instrument Recording ID | County

Street Address

City | State CLICK/TYPE ▼ | ZIP

Reference

Note To Abstractor

0 / 500

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.

Cancel   Submit

The form is divided into four sections:

Select Document (1):

Document Options (2 and 3):

Pertinent Pages is only available for Mortgages and CEMAs.

Address, Owner, and Document Information(4):

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.

DOCUMENT ID

COUNTY

STREET ADDRESS

CITY

STATE

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, the abstractor service form will have the added benefit of pre-populating the address fields.

All other functionality remains the same.

Order Portal:

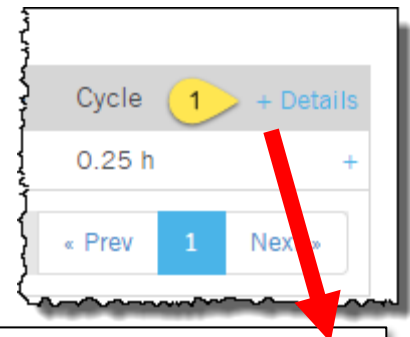Documents ordered through the Abstractor Service are returned in the Order Portal.

Users can check the status of their order and download retrieved documents in Order Portal.

Documents returned via the Abstractor service will be retained for 12 months before being purged.

Jobs in Process:
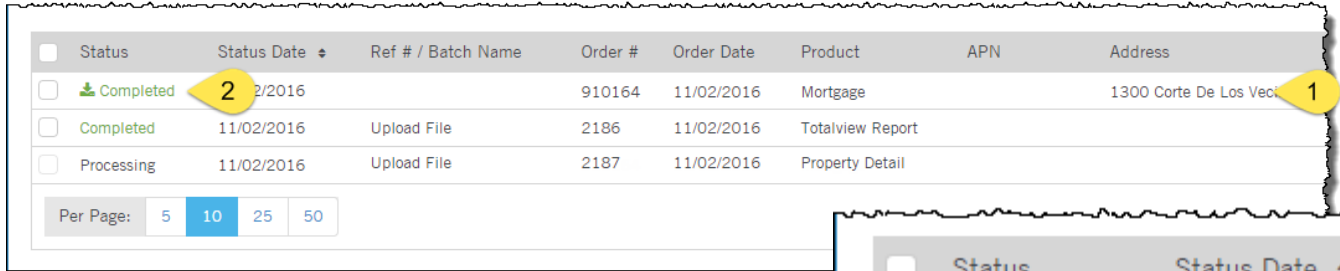
Clicking the Details (1) link at the far right hand side of the record list in the Dashboard will open the processing details (2) for that order.

Completed Job:

When the job (1) has been completed and the document retrieved, the dashboard will update with a "Completed" (2) status.

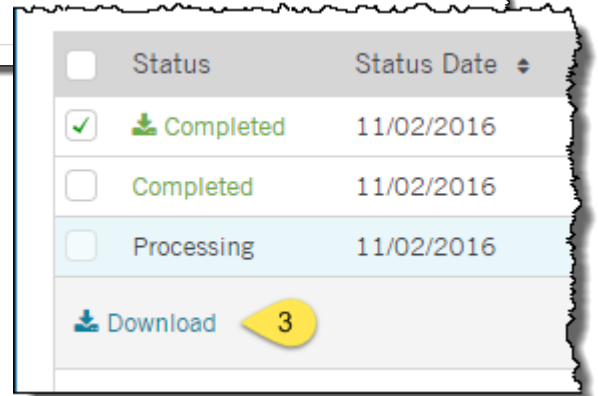Click the checkbox next to the completed job and a download link (3) will appear.

Click Download to save the zip file containing your document image.

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 Tranfser Document, and click Order.
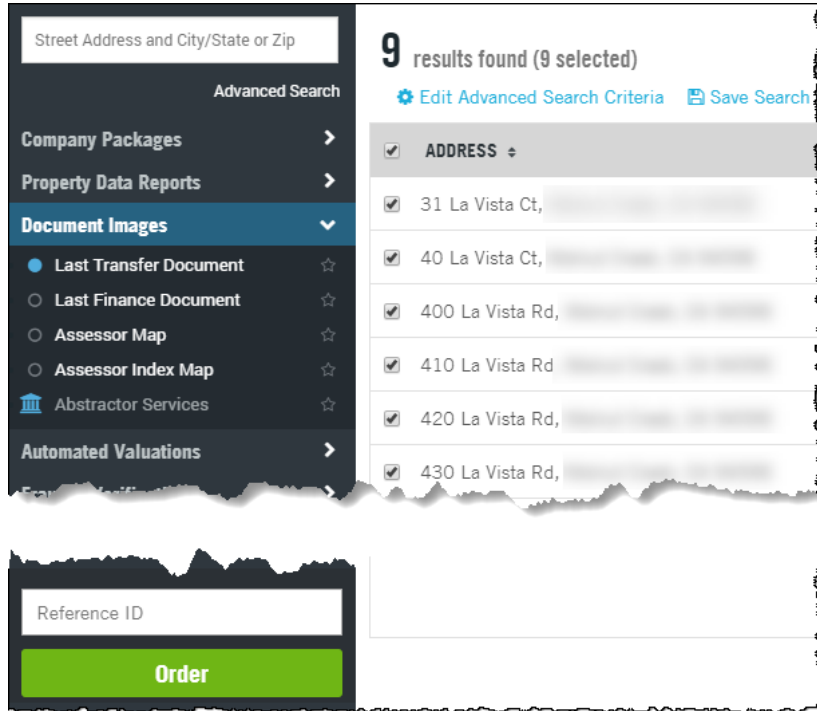
You will be presented with a dialog box indicating that you can order the document (or report) for all selected properties. Click Order.
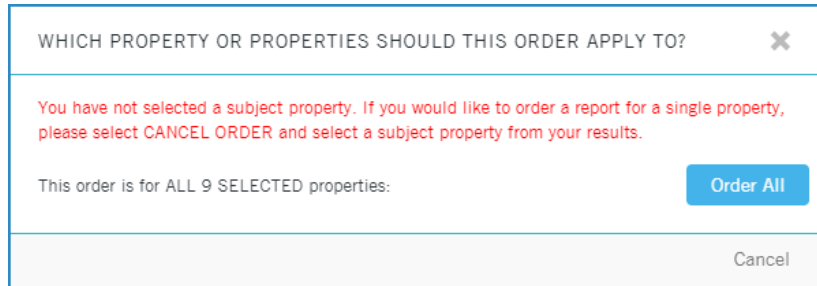
Now you can use the arrow keys or click on a property to view the Last Transfer Document on each property.