Account Administrator’s Guide to Configuring TitleFlex for Customer Self-service

Rev. 201907

TitleFlex™
by DataTrace®

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Overview

TitleFlex provides Account Administrators with the ability to setup customers (external users) who can then access their own farms, packages, reports and documents using that account in a 24x7 self-service model.

Contact your Account Manager at DataTrace to have this feature enabled (811-221-2056 or click the Live Chat icon in TitleFlex). Once the feature is enabled by your DataTrace Account Manager, you can add external users.

The Account Admin can create external users, provision and limit the users, organize them into groups and manage the users just as they can manage employee users. This manual will cover the Account Administrator's role in setting up external users and the external users' experience.

Note: The ability to create and manage external users is not automatic. You must request it as part of the setup of your TitleFlex account.

Creating External Users

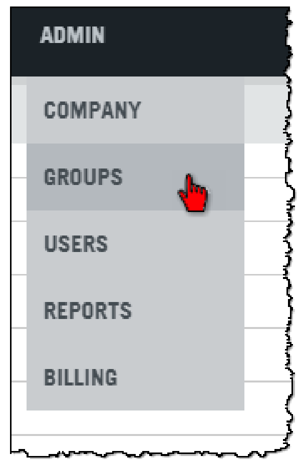
Account Administrators must use an existing customer record in Customer Center to create an external user. Product permissions and limits can then be assigned to external users within the Admin tool. This can also be done by Group Managers.

Step One: Request External User Provisioning

Contact your Account Manager and have them enable your account to provision External Users. This process is quick and can be done while you are on the phone with them.

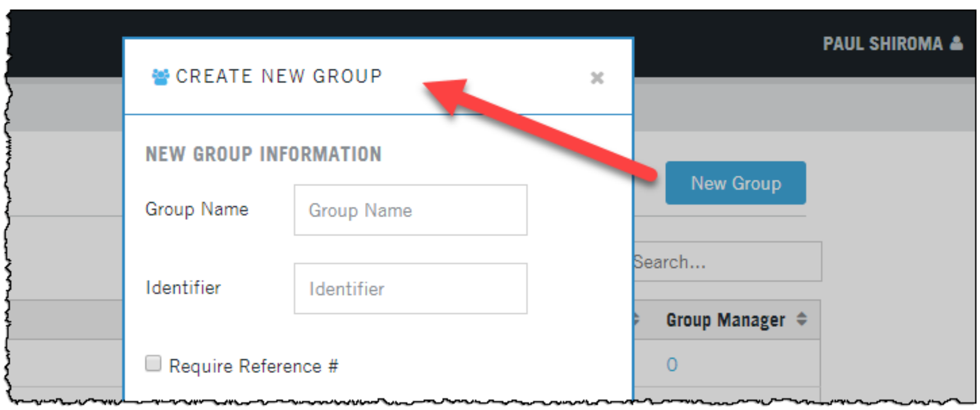
Log out and log back in to refresh the new settings.

Step Two: Set up Groups for External User Accounts



Before you begin setting up your customers as External Users, you will want to create a group or multiple groups to manage them. Start by clicking on the Admin link and selecting Groups, as shown at right.

Enter a **Group Name.** You may add an Identifier and enable Require a Reference Number (both optional). Click **Save** at the bottom of the dialog box. Repeat this process for each group you would like to create.

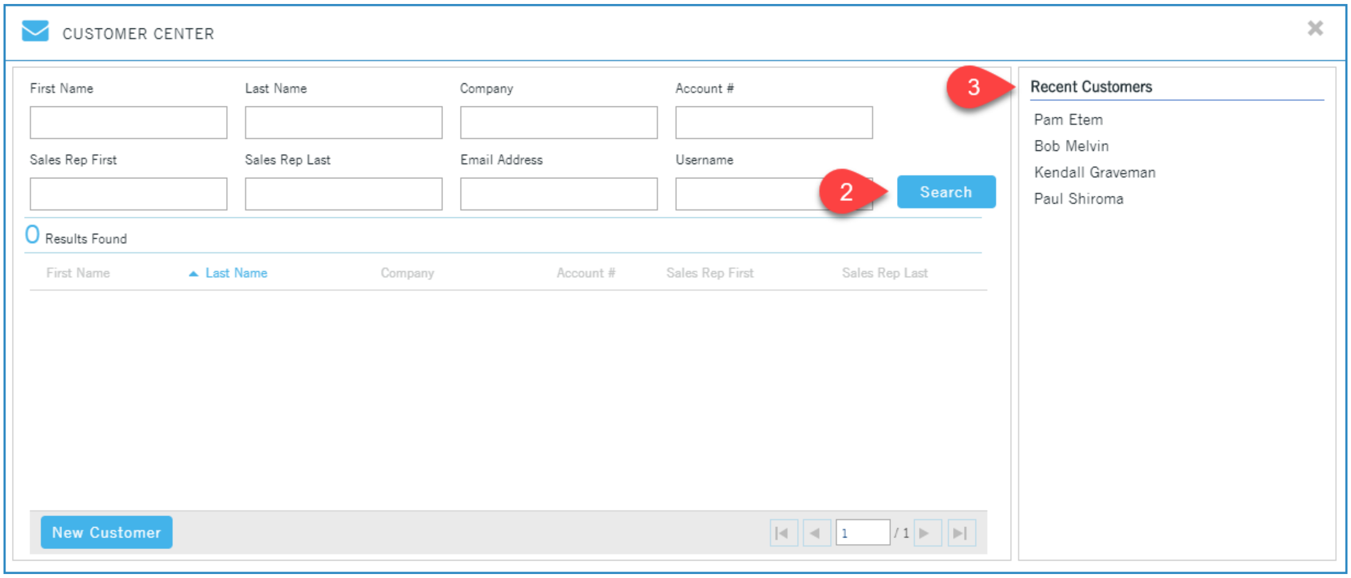


Your new group(s) will appear in the group list.

Your group(s) can now be used when External Users are created.

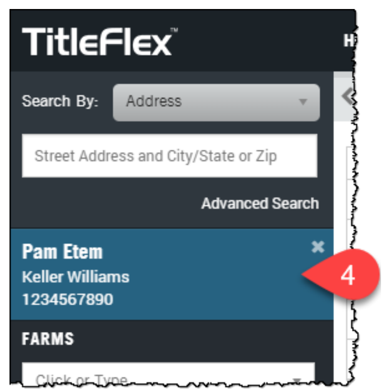
Step Three: Provision Customers with External User Access

To setup an external user account for one of your customers, search for (2) or select (3) an existing customer in the Customer Center. If your customer is not already in the Customer Center, click **New Customer** to create the customer.

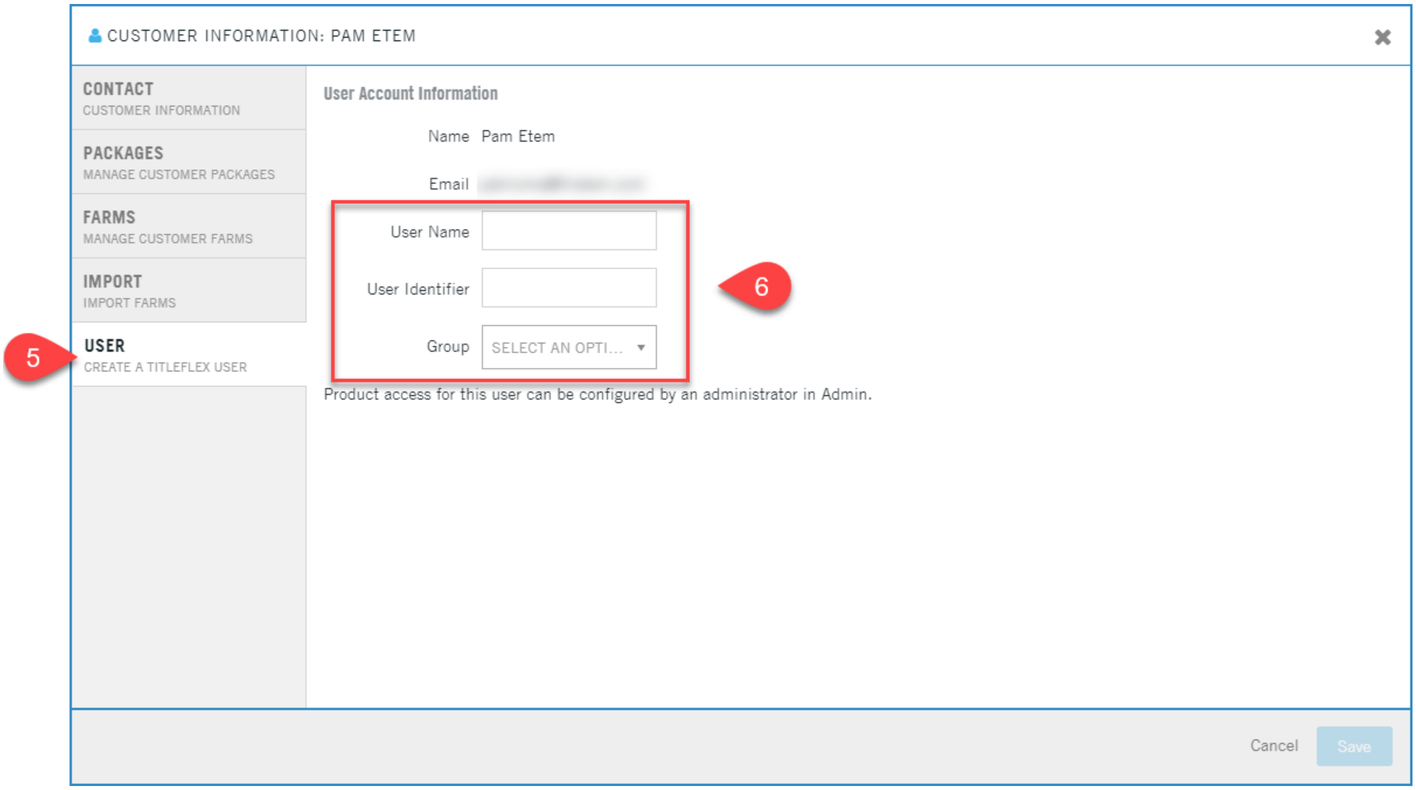


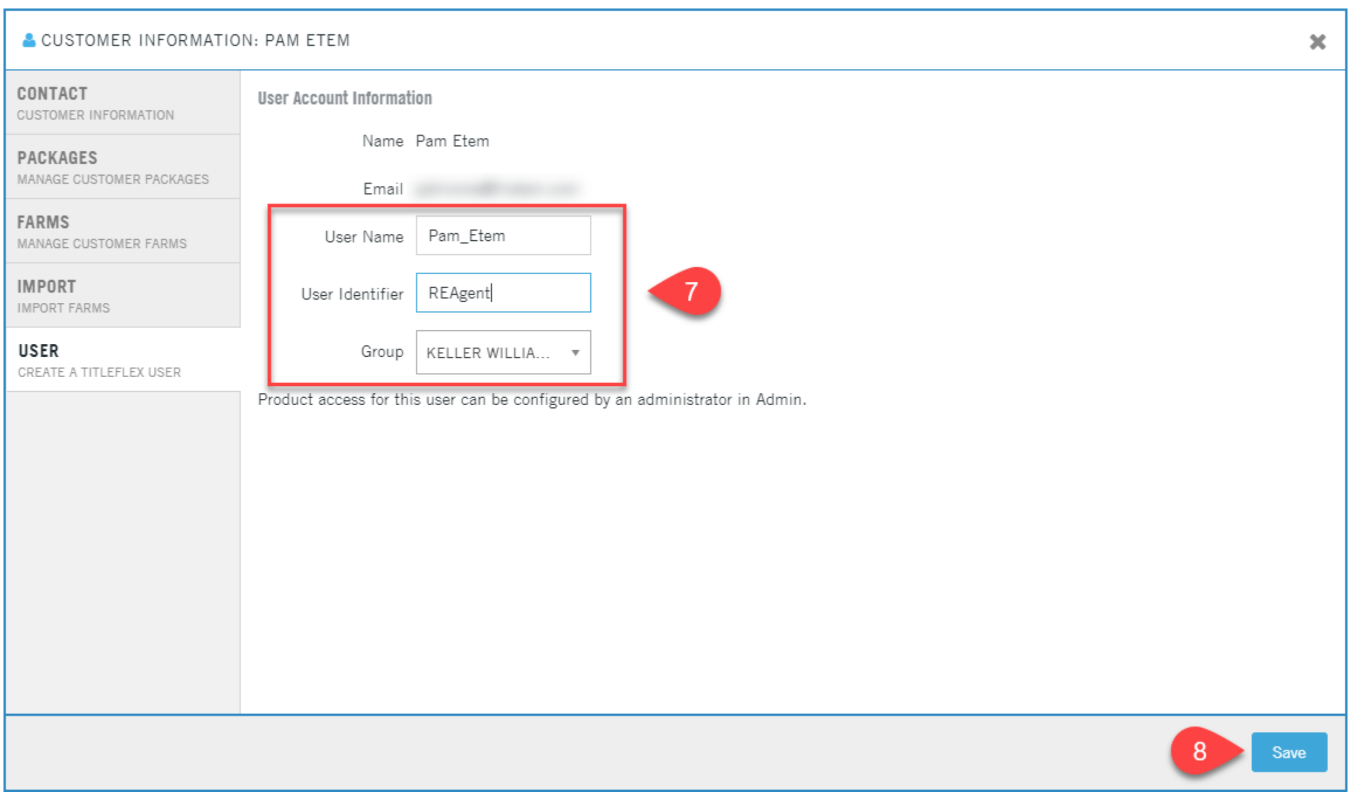
After selecting (or creating) the customer, their information card will appear in the left-hand frame.

Click the customer's name in the left hand frame (4) to open the contact card.



A new tab, **User**, will be present at the bottom left (5) of the customer's information card. (This requires the provisioning explained in Step One.). Click the **User** tab. Complete fields for **User Name**, **User Identifier (optional)** and **Group** and click **Save**. (6, 7, 8)

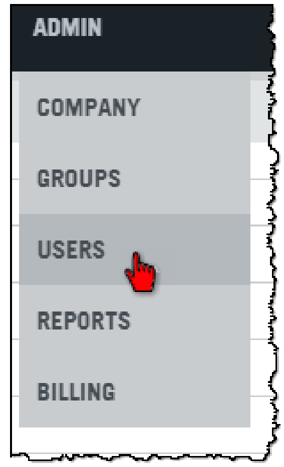




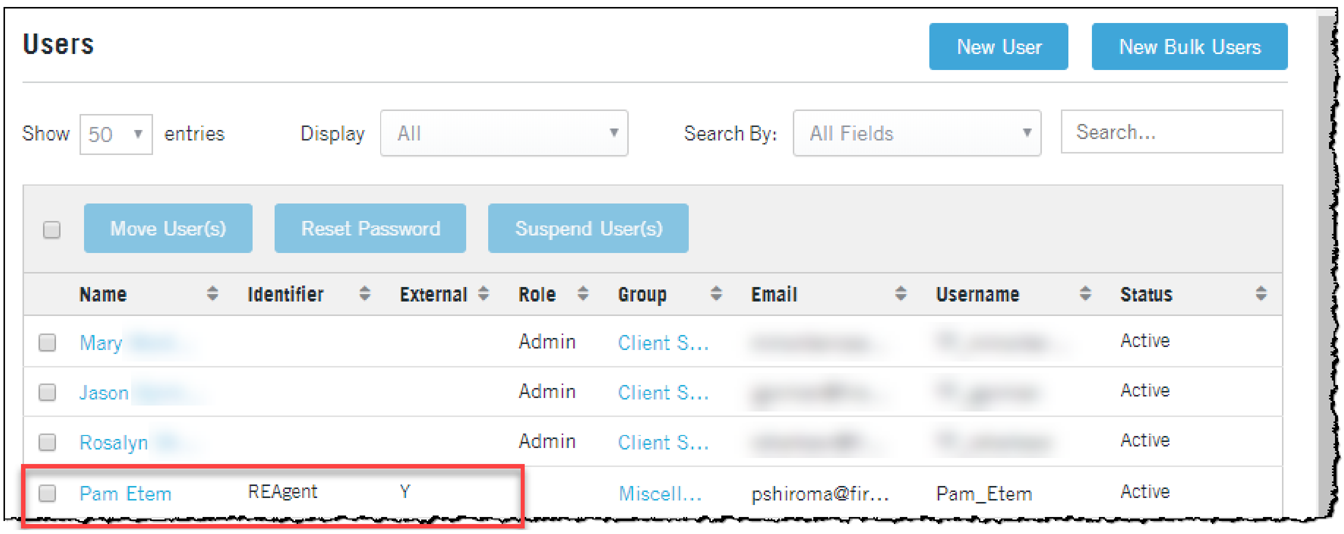
Step Four: Provision an External User Account with Product Access Permissions

The Company Admin or Group Manager can now provision the External User's account. This includes access to reports, farming and documents, including limitations to the number of reports, farming records or documents ordered.

From the **Admin** or **Group Manager** link at the top of TitleFlex, click **Users**.

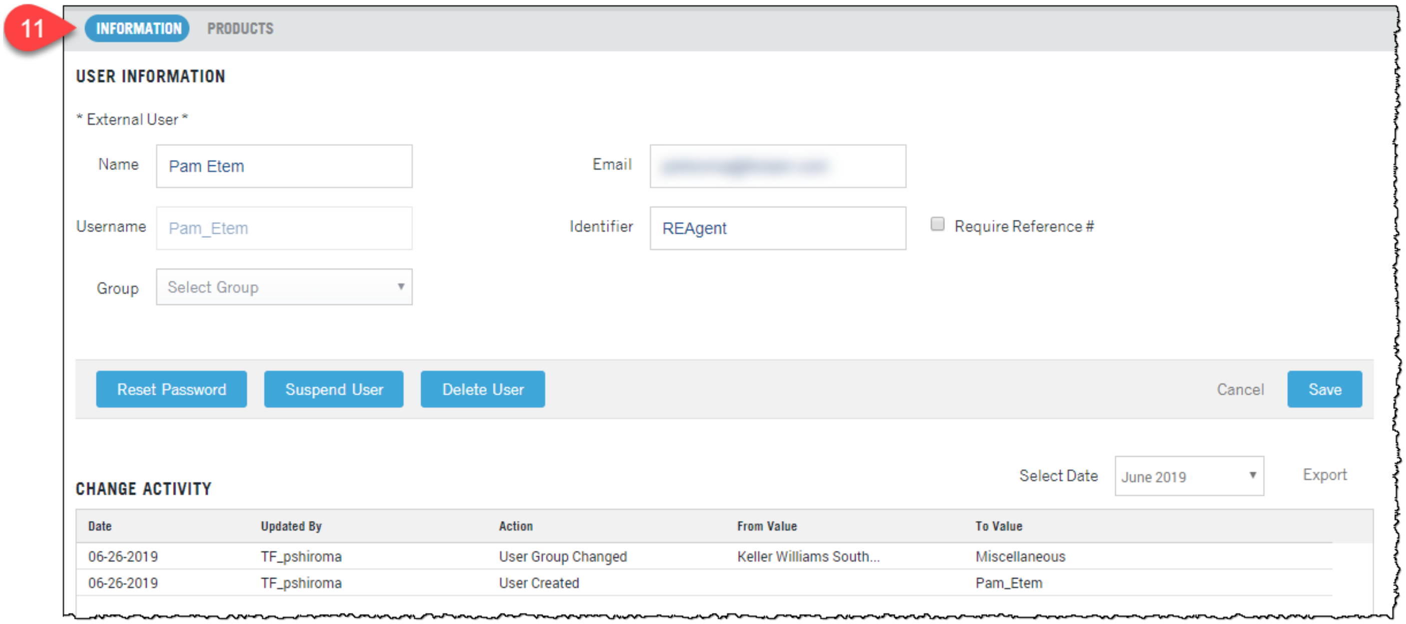


In the **Users** list, locate your newly created External User. Note that external users will have a "Y" in the **External** column.

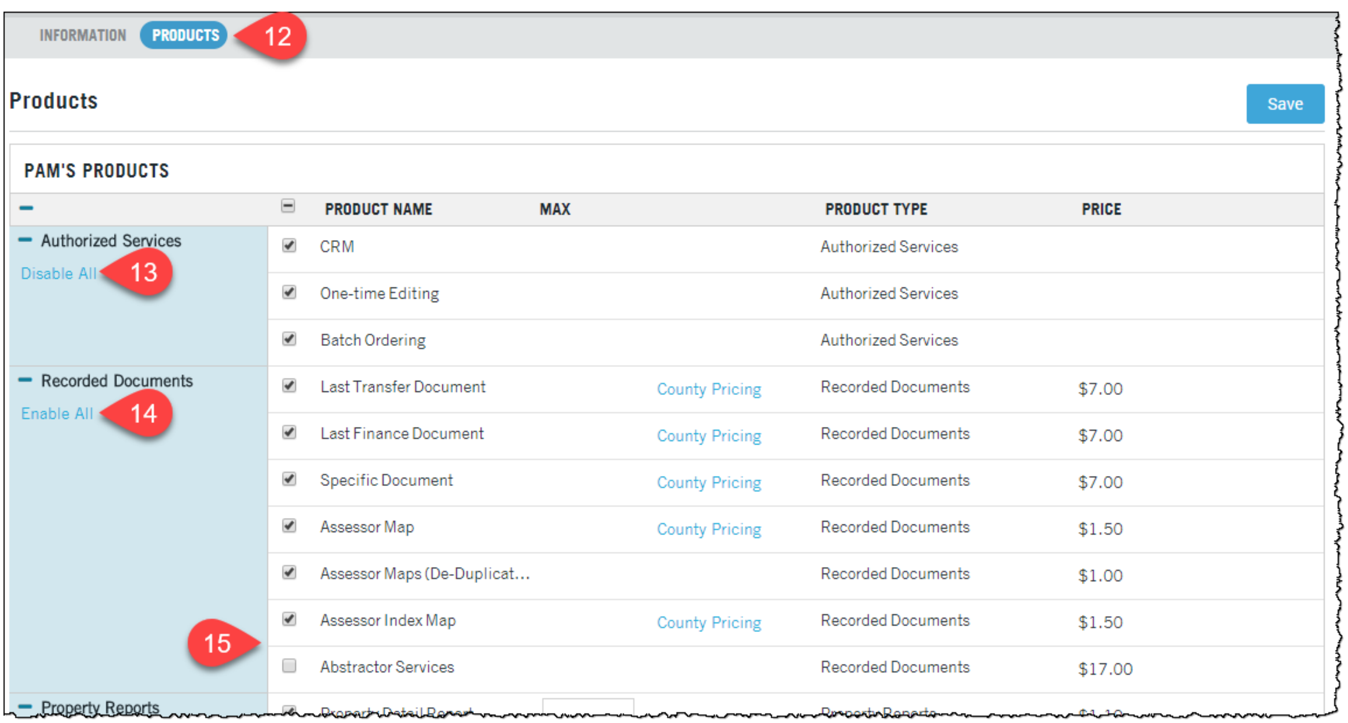


Click on the External User name to go to their details page.

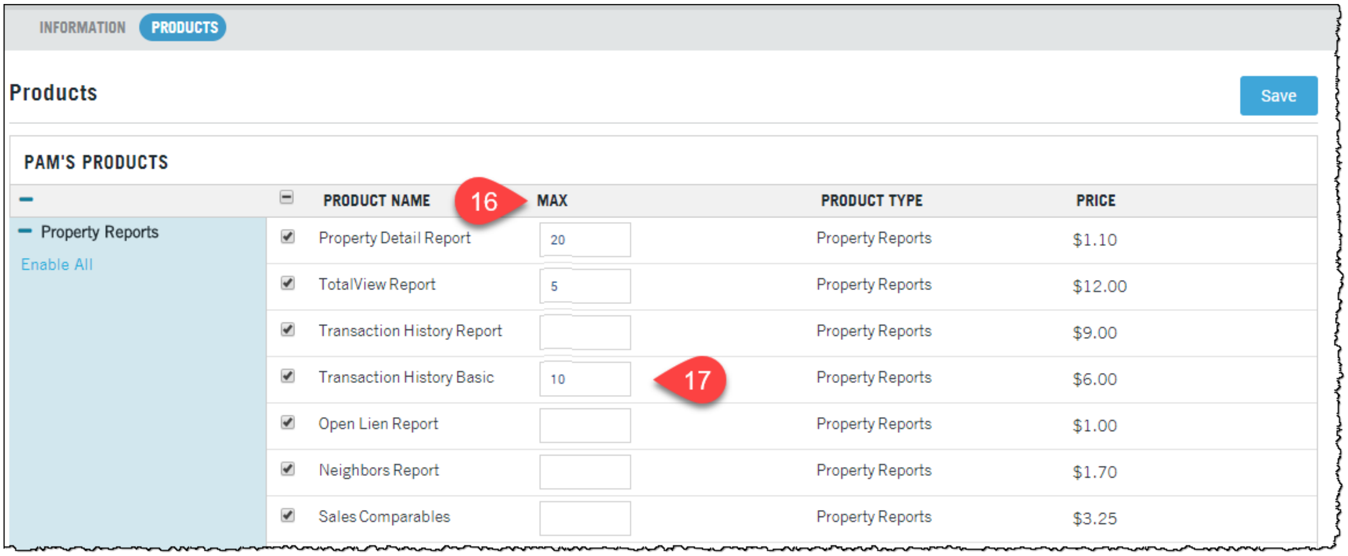
The **Information** tab (11) will allow you to change details, passwords, or suspend/delete the user. Make sure to click **Save** after making any changes.



Clicking on the Products tab (12) will allow the Company Admin to make access changes (13, 14, 15) either globally within a section (13, 14), or at a specific feature level (15) by selecting the individual check boxes.



Maximum limits for the different options can also be set (16, 17) by entering the maximum number available to be ordered in a given month.



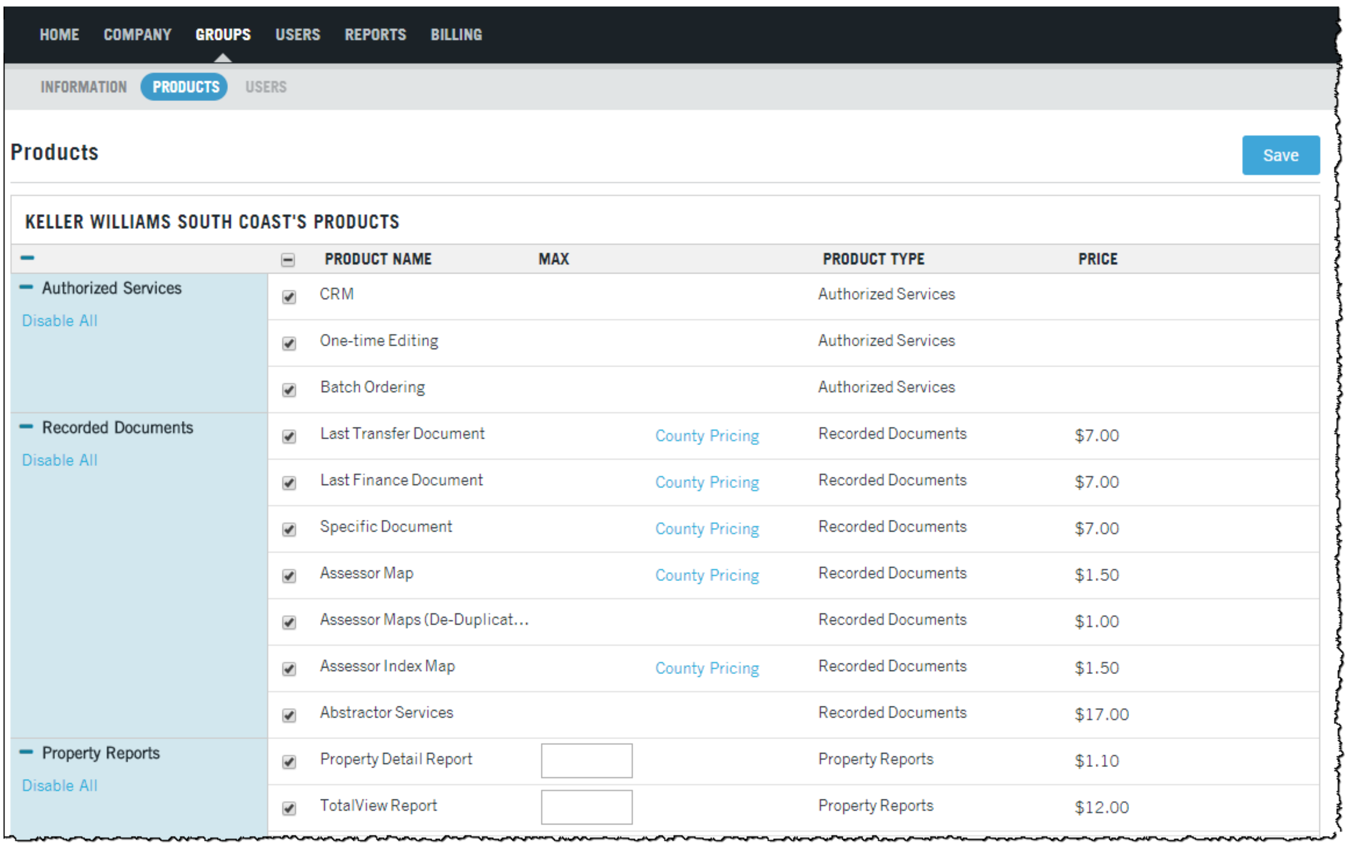
Make sure to click **Save**.

Notes on Provisioning:

Provisioning Groups: The same provisioning functionality is available at the Group level should the Account Administrator wish to apply the same provisioning and limits to all external users in a group. Go to **Groups** in the Navigation Bar > Select **Groups** > click **Products** and make your changes. Again, make sure to click **Save** when you are done.

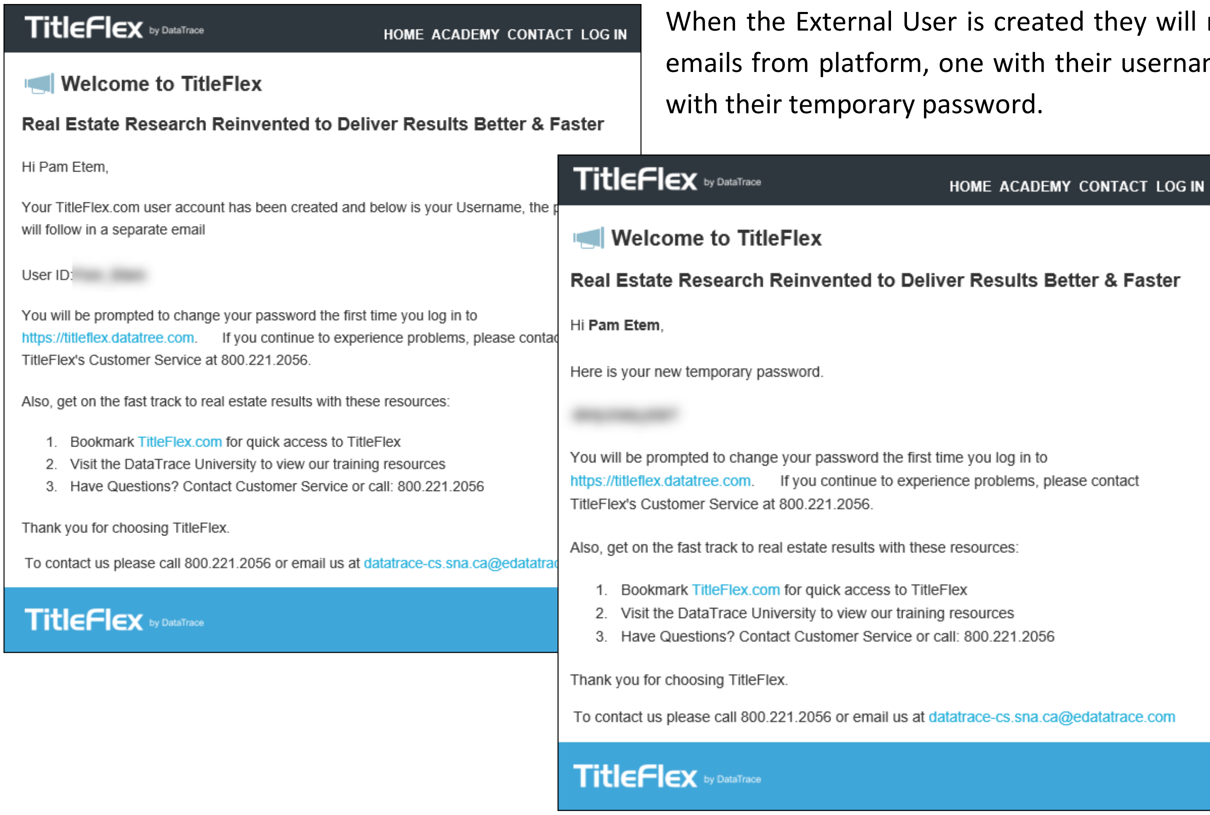
Group vs User Provisioning: For maximum configuration options, the platform allows you to configure permissions and limits for users and groups independently.

For example, assignments made to the group will supersede any assignments <u>previously</u> made to individual users in the group. However, if an individual user within that group is given any assignment <u>after</u> the provisioning of the group, that assignment will apply to only that user while the rest of the users in the group retain the settings assigned to them. This configuration allows you to setup Power Users within a group who have additional provisions and limits that can assist other users within the group while still controlling costs.

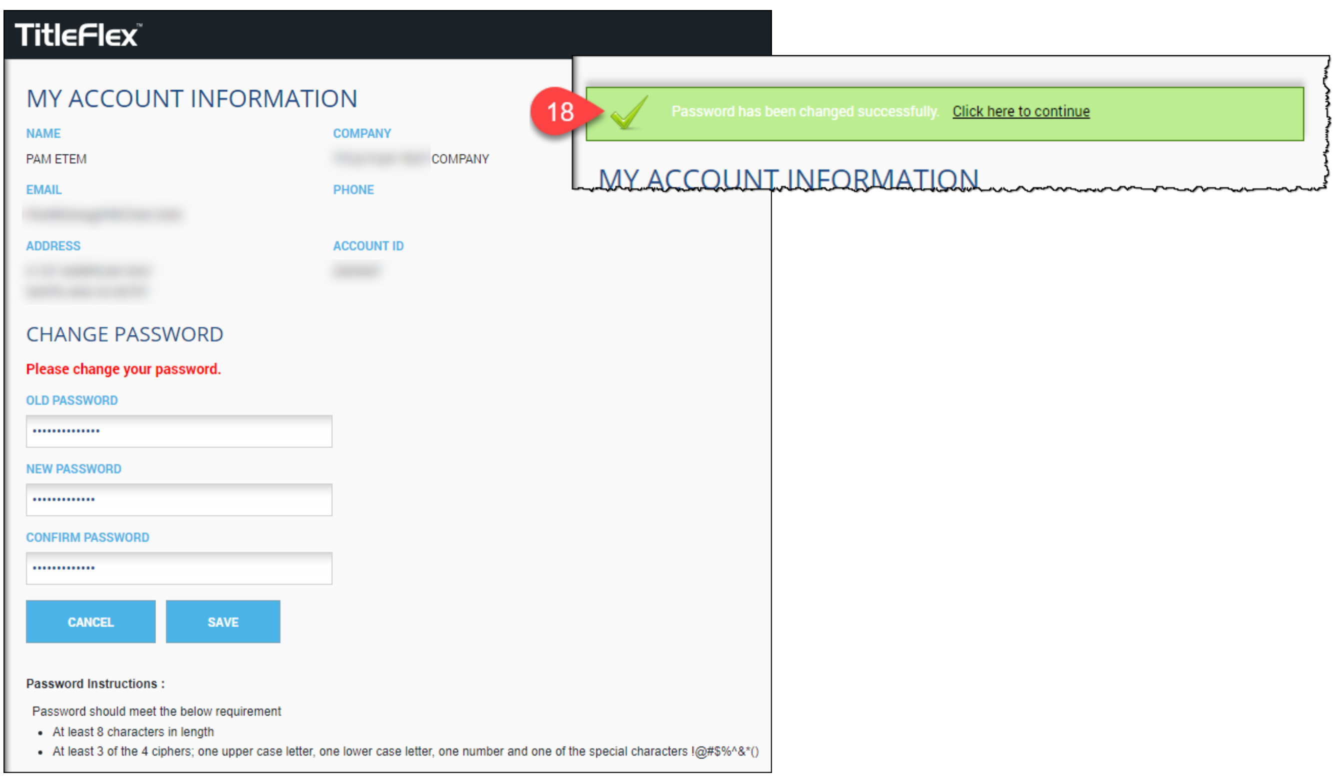


External User Experience

When the External User is created they will receive two emails from platform, one with their username and one with their temporary password.

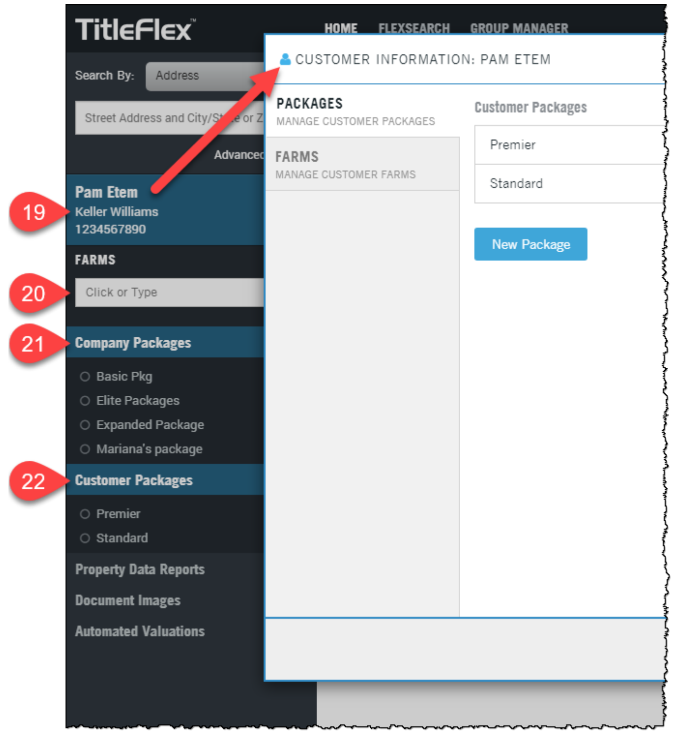


The External User will be required to change their password when they first login and will receive a green **Success** banner. Click the **Click here to continue** (18) to finish the login and go to the TitleFlex home page.



Once inside TitleFlex, if the External User clicks on their name (19), it will open their contact card which allows them to create, edit, delete, and manage their own Farms and Packages.

From the TitleFlex home page, the external user will have access to any of their saved Farms (20), Company Packages you have provisioned (21) or their own Packages (22).

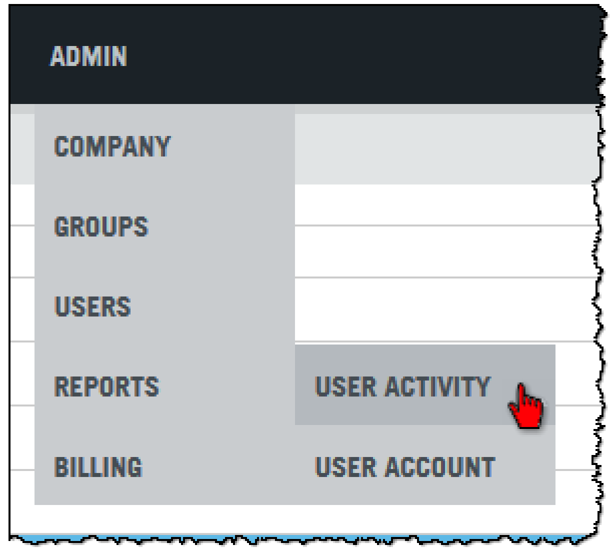


The setup for the External User is complete at this point. They can now create their own farms and packages and order reports subject to the provisions and limits the Company Admin has setup.

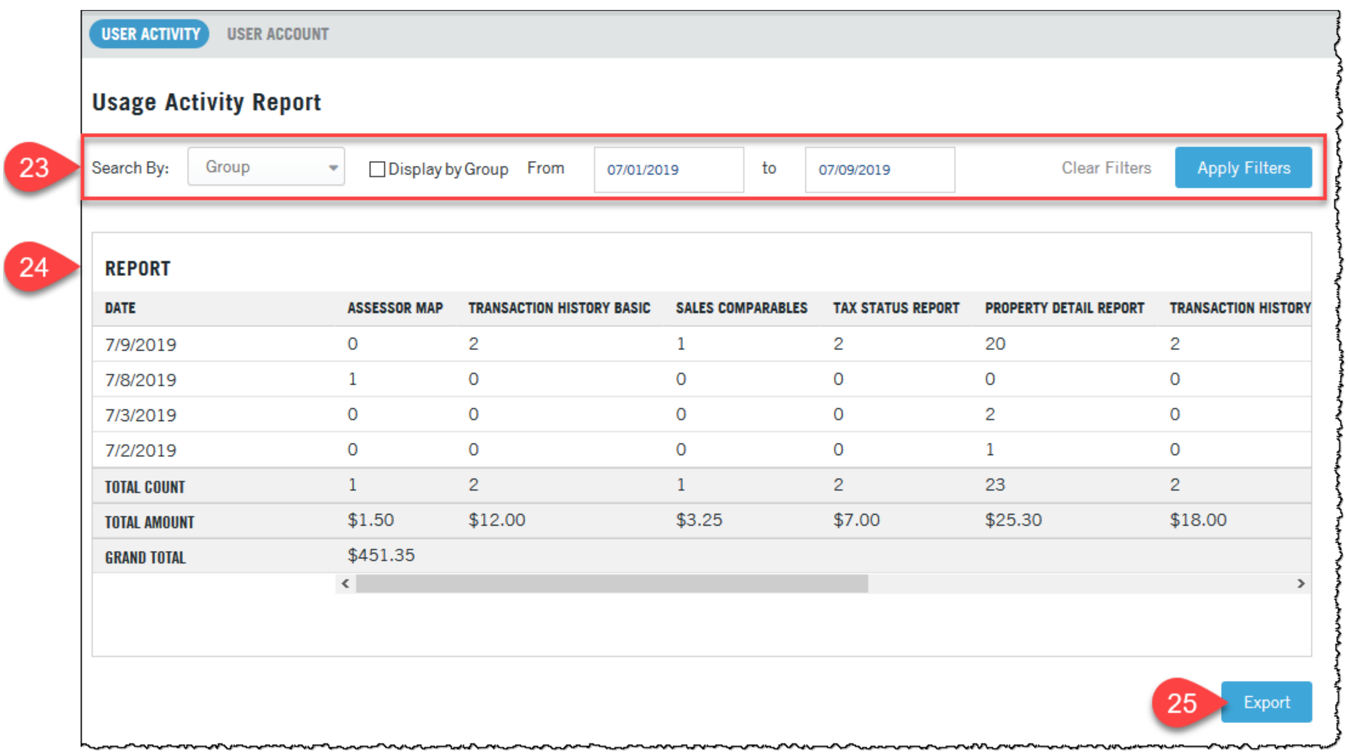
Reporting on External User Activity

Company Administrators can track the usage of External Users through the Admin menu > Reports > User Activity.

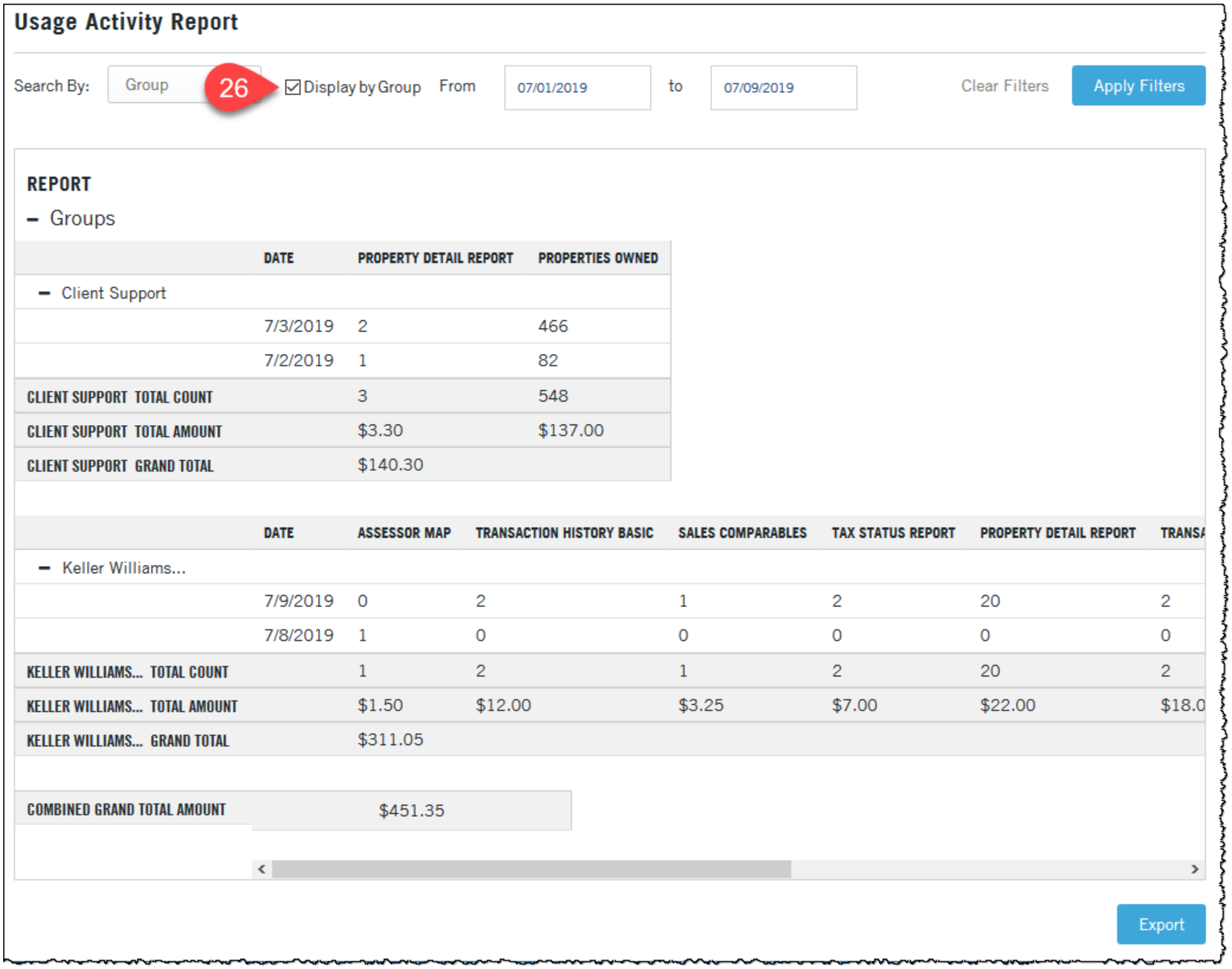
Report options provide the ability to filter by users or groups as well as by date range. Information can also be exported into a csv file.



Filters for searching by Group or User and date ranges (23) can be applied. Make sure to click Apply Filters. The report (24) will update to display the information with your new parameters. If you wish to export the information, click Export (25).



To setup the report to display by group, select the Display by Group checkbox (26) and click Apply Filters.



Usage Activity Report

Search By: Group 26 ☑ Display by Group From 07/01/2019 to 07/09/2019 Clear Filters Apply Filters

REPORT

– Groups

	DATE	PROPERTY DETAIL REPORT	PROPERTIES OWNED
– Client Support			
	7/3/2019	2	466
	7/2/2019	1	82
CLIENT SUPPORT TOTAL COUNT		3	548
CLIENT SUPPORT TOTAL AMOUNT		$3.30	$137.00
CLIENT SUPPORT GRAND TOTAL		$140.30	

	DATE	ASSESSOR MAP	TRANSACTION HISTORY BASIC	SALES COMPARABLES	TAX STATUS REPORT	PROPERTY DETAIL REPORT	TRANSA
– Keller Williams...							
	7/9/2019	0	2	1	2	20	2
	7/8/2019	1	0	0	0	0	0
KELLER WILLIAMS... TOTAL COUNT		1	2	1	2	20	2
KELLER WILLIAMS... TOTAL AMOUNT		$1.50	$12.00	$3.25	$7.00	$22.00	$18.0
KELLER WILLIAMS... GRAND TOTAL		$311.05					

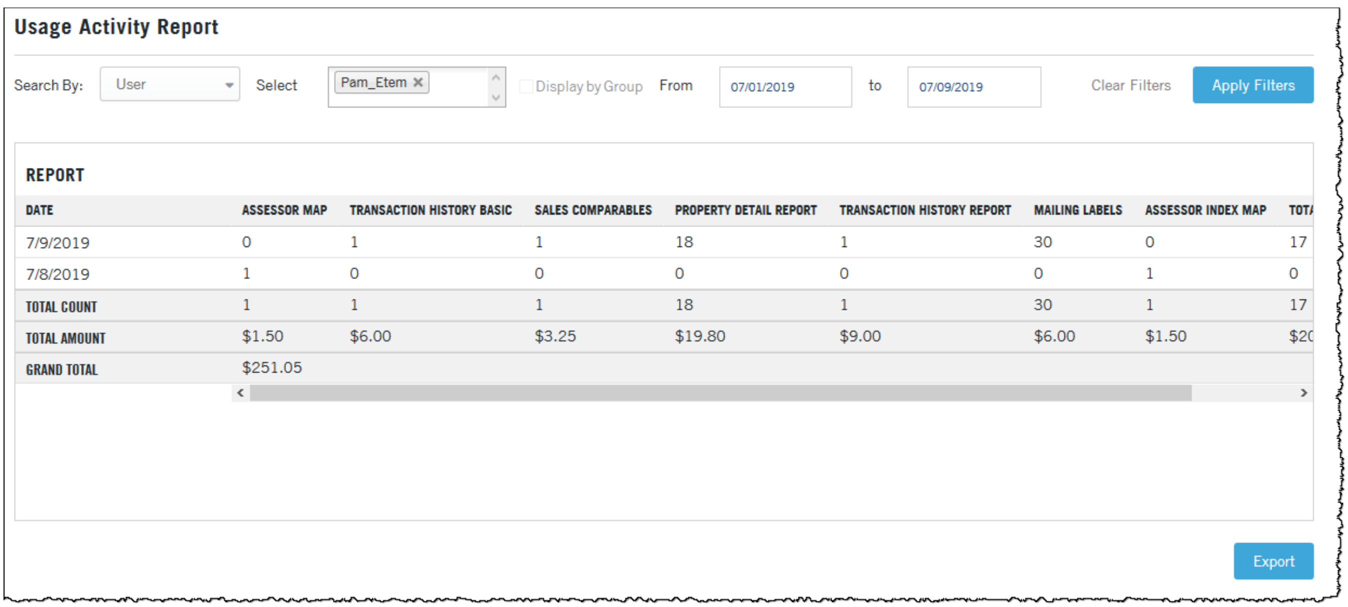
COMBINED GRAND TOTAL AMOUNT	$451.35

Export

To setup the report by user, change the Search By to User and click in the Select pick list to select one or more (or all) users.

Click the "x" next to an entry will remove that entry from the filter list.

Example of single External User usage report:



DATE	ASSESSOR MAP	TRANSACTION HISTORY BASIC	SALES COMPARABLES	PROPERTY DETAIL REPORT	TRANSACTION HISTORY REPORT	MAILING LABELS	ASSESSOR INDEX MAP	TOTA
7/9/2019	0	1	1	18	1	30	0	17
7/8/2019	1	0	0	0	0	0	1	0
TOTAL COUNT	1	1	1	18	1	30	1	17
TOTAL AMOUNT	$1.50	$6.00	$3.25	$19.80	$9.00	$6.00	$1.50	$20
GRAND TOTAL	$251.05							