

# DataTree<sup>®</sup> ACADEMY

## DATATREE QUICK REFERENCE GUIDE

Rev. 20201015



Use this QuickStart Guide to view how to: **1** Conduct a Search, **2** Order Reports and Documents, **3** View Reports, **4** Save, Print and Share, and find **5** Live Chat and **6** Support, if you need help.

**1** Enter your address in the search bar and press enter. Searches can be done by APN, Owner, or Document.

The screenshot shows the DataTree homepage with a search bar at the top left. A callout box with the number 1 points to the search bar. The main content area shows 'RECENT ORDER ACTIVITY' with a summary table:

All:	Processing:	Action Required:	Ready:	Completed:	Errors:
1	0	0	0	1	0

Below the table, it says: 'Go to the View All Orders tab in the Order Portal to download your Ready orders and to address any orders that are in Action Required Error status.'

**2** Select reports or documents and click

**3** Ordered reports will show as tabs. Click to view.

**4** Click Export to Save, Print or Email

**5** Click Live Chat for immediate help.

**6** Click Username for information and training.

The screenshot shows the search results for '4727 NW 31ST TER'. The main content area displays a map and property details. Below the map, there are tabs for 'SUBJECT PROPERTY' and 'FLEX DOCS'. A callout box with the number 3 points to the 'FLEX DOCS' tab. Below the tabs, there is a table with columns for 'Transaction Data' and 'Document Images'. A callout box with the number 4 points to the 'Export' button. A callout box with the number 5 points to the 'Live Chat' icon. A callout box with the number 6 points to the user's name 'CHRISTOPHER WALA' in the top right corner.

Transaction Data	Document Images
Available	Available
Last Rec Date	Last Rec Date
Start Date	Start Date
Deeds	April 23, 2019
Mortgages	April 23, 2019
Assignments	April 23, 2019
Releases	April 23, 2019
Foreclosures	April 23, 2019

From the Username>Settings menu at the top right, you can view your account details and change your password.

The screenshot shows a 'SETTINGS' window with a sidebar on the left containing menu items like 'Company', 'Standards', 'Property List', 'Document', 'Appraisal', 'Property Classification', 'Automated', 'Fraud & Valuation', 'Market', 'Wall Street', and 'References'. The main content area is divided into sections: 'ACCOUNT' (USER ACCOUNT INFORMATION), 'PREFERENCES' (USER PREFERENCES), 'USAGE REPORT' (ACTIVITY ANALYTICS), and 'CUSTOM LINKS' (LINK PREFERENCES). The 'USER ACCOUNT INFORMATION' section includes fields for Name, Company (DBS New Hire Training Account), Email, Phone, and Address. Below this is a link to 'Contact your account administrator to update your information'. The 'CHANGE PASSWORD' section contains three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right of the window are 'Cancel' and 'Save' buttons.