

# DataTree<sup>®</sup> ACADEMY

## MANAGING USER SETTINGS

Rev. 20201015



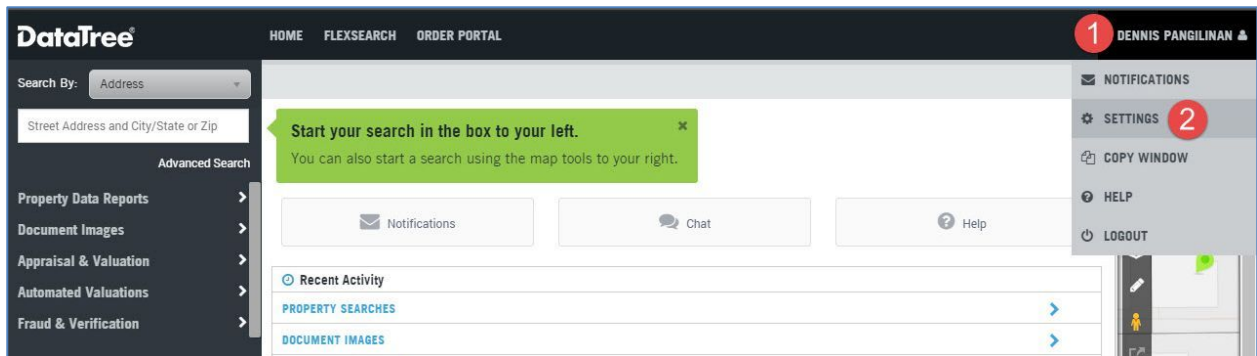
## Contents

Overview.....	2
Account.....	3
Preferences .....	4
Cover Page.....	4
Usage Report Tab .....	6

## Overview

This how to guide covers configuring the **default** user preferences and settings in DataTree and includes topics such as report options, notification emails, cover pages and usage statistics. Remember that these are user-specific settings and do not change the settings for the company.

Move your mouse to your Username (1) and click on Settings (2).




The settings dialog window covers four areas:

- Account Information including the ability to change the user's password
- Preferences affecting report displays and email options
- Cover Page and report footer logos
- Usage Report information for that user

**NOTE:** Not all the functionality discussed here may be displayed in your account as some of the features may not have been included in your company's contract.

# Account

The user can change their password from this tab or notify their local admin to update the contact information. The Account ID field may be needed by your DataTree Customer Service team for assistance with this product.

 SETTINGS

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**ACCOUNT**  
USER ACCOUNT INFORMATION

**PREFERENCES**  
USER PREFERENCES

**COVER PAGE**  
COVER PAGE & LOGO

**USAGE REPORT**  
ACTIVITY ANALYTICS

**USER ACCOUNT INFORMATION**

<b>Name</b>	Dennis Pangilinan	<b>Company</b>	First American Data Tree
<b>Email</b>	dpangilinan@firstam.com	<b>Phone</b>	
<b>Address</b>	4 First American Way address213 Santa Ana, CA 92708	<b>Account ID</b>	2000001

[Contact your account administrator to update your information](#)

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**CHANGE PASSWORD**

Old Password	<input type="text"/>		
New Password	<input type="text"/>	Confirm Password	<input type="text"/>

## Preferences

Preferences contain options for email notifications and county default for Advanced Search. It will also contain options for Display, Report and Email.

**SETTINGS**

**ACCOUNT**  
USER ACCOUNT INFORMATION

**PREFERENCES**  
USER PREFERENCES

**COVER PAGE**  
COVER PAGE & LOGO

**USAGE REPORT**  
ACTIVITY ANALYTICS

**USER PREFERENCES**  
**GENERAL**

Order Status Email Notifications

Twice Daily  Once Daily  Weekly

Set Default County for Advanced Search

STATE  COUNTY

**DISPLAY OPTIONS**

Property Photo Display   
Include property photos in printed PDF reports (TotalView, Sales Comparables, Neighbors)

Maps Display   
Include maps in printed PDF reports (Sales Comparables, Neighbors)

Listing Data   
Include "For Sale" listing data in on-screen and printed PDF reports (TotalView, Property Detail, Sales Comparables)

Estimated Value

## Cover Page

DataTree can use Microsoft Word formatted documents as cover pages which incorporate the property photo, address and company representative contact information and other information. These can be used as the cover document when providing property information to your customers. Additionally, the users have the ability to change the default report footer to your company's logo.

**SETTINGS**

**ACCOUNT**  
USER ACCOUNT INFORMATION

**PREFERENCES**  
USER PREFERENCES

**COVER PAGE**  
COVER PAGE & LOGO

**USAGE REPORT**  
ACTIVITY ANALYTICS

**COVER PAGE**

Select a Cover

Choose

Cover Name

Template

Choose File No file chosen

\*.docx only

[How To Guide](#)

[Download Merge Tags File](#)

[Example Cover Page](#)

Cancel Save

Cover Page Preview



# Usage Report Tab

The last tab allows a user to view, track and export their usage by month (1, 3). Usage for the selected month can also be exported into a csv file.

⚙️ SETTINGS

<p><b>ACCOUNT</b> USER ACCOUNT INFORMATION</p> <hr/> <p><b>PREFERENCES</b> USER PREFERENCES</p> <hr/> <p><b>COVER PAGE</b> COVER PAGE &amp; LOGO</p> <hr/> <p><b>USAGE REPORT</b> ACTIVITY ANALYTICS</p>	<p><b>USAGE REPORTS</b></p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> <span>March 2017 ▼</span> <span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">EXPORT DETAILS</span> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">Date</th> <th style="width: 15%;">Last Transfer Document</th> <th style="width: 15%;">Sales Comparables</th> <th style="width: 15%;">Property Detail Report</th> <th style="width: 15%;">Title Chain &amp; Lien Report</th> <th style="width: 15%;">TotalView Report</th> </tr> </thead> <tbody> <tr> <td>3/6/2017</td> <td>1</td> <td>0</td> <td>1</td> <td>0</td> <td>10</td> </tr> <tr> <td>3/3/2017</td> <td>0</td> <td>1</td> <td>0</td> <td>1</td> <td>0</td> </tr> <tr> <td><b>Total Request</b></td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>10</td> </tr> </tbody> </table> <p style="font-size: 0.8em; margin-top: 10px;">Note: Usage and pricing for Flood, Ownership &amp; Encumbrance and Valuation and Review products are not available in this report.</p>	Date	Last Transfer Document	Sales Comparables	Property Detail Report	Title Chain & Lien Report	TotalView Report	3/6/2017	1	0	1	0	10	3/3/2017	0	1	0	1	0	<b>Total Request</b>	1	1	1	1	10
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