

User Guide Version 1.1

The Leader in Digital Title

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Logging In

To log in, navigate in a web browser to titleLOOK.com and click 'Log In' (1) or go directly to app.titlelook.com/

Enter your assigned titleLOOK login and password into these fields to sign in (2). If you do not know your login information, try using your company email address or contacting your titleLOOK administrator.

If you have a secured Microsoft account, you can sign in with your credentials using the 'Sign In With Your Microsoft Account' button (3)

If you do not have a username / password combination, please contact your titleLOOK administrator.

After you log in you will be taken to the main page. The titleLOOK interface is divided into two main sections. The first is the 'New Order' panel, and the second is the 'Existing Orders' panel.







Making a New Order

- 1. Select your Group (1).
- 2. Enter the unique Order ID (2). This should follow the organizational conventions of your company.
- 3. Upload your Documents (3). See page 9.
- 4. Choose the Starting Document from the list (4).
- 5. Click the Submit button to begin the linking process (5).

For help with making a new order, refer to pages 7-13 in this user guide.

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QUICKSTART GUIDE

Your Order will now transfer to the Order List (seen on <u>page 14</u>). To review, edit and publish your order, click on the Review action (seen on <u>page 17</u>) to get to the Order Review Panel (Fig.5, at right). Here, you will be able to view the Order Summary, Linked Phrases and Documents and make any necessary revisions before publishing.

Review

If your new order contains any Unmatched Documents and Phrases, you can manually link them by selecting the document which corresponds to the phrases in the table using the 'Document to Link' drop-down menu (1).

If additional documents need to be added to complete the order, you can do so using the 'Add / Update Documents' button (2), or by navigating to the 'Documents' tab (3).

Publish

When your documents have been linked and your new order contains all of the relevant material, you can update the Order (a) and then publish it by clicking on the 'Publish' button (s).

Each of these steps are explained in further detail in the following pages.

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NEW ORDER PANEL



This section is used to create all new orders.

All sections must be completed before you can hit the 'Submit' button.





1. Group

titleLOOK customers can use 'Groups' to distinguish different offices or teams under the umbrella of their accounts. Customers can have, but do not necessarily need, multiple groups.

When creating a new 'Order', select the correct Group you want to submit the order for. Features that may differentiate between Groups include colors/branding, verbiage in coversheets, or even coding that will automatically identify phrases your specific group uses to auto-hyperlink your commitment.





2. Order ID

This is a free-form field that allows you to keep track of your specific order. As with any free-form field, it is best to create a pattern for your 'Order ID'. There is a character limit of 50 characters so be cognizant of the string you use. Once selected, you cannot change the Order ID.

You may want to use the following structures for your Order ID:

- Address of Property (e.g., 335 Fifth Ave, 123 Main St, etc.)
- Policy Number (e.g., 95-1246563, 36331532, etc.)
- Loan Number (e.g., CTB 123456, etc.)

Any string that you type can be used to find your order with the search filter so make sure to use text that is unique to your order. Be careful if using words that can be abbreviated or spelled differently (e.g., 333 Fifth Ave vs. 333 5th Avenue). This will help your team properly lookup orders. Only the specific string (or subset of the string) will be searched – any variations will not be searched for.

Do not use any special characters when creating your Order ID (i.e. \$*@, etc). If special characters are entered in the Order ID, they will be replaced with an underscore "_."

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3. Documents

Upload your Report (prelim or commitment) and all supporting documents to be linked using one of the following methods:

Drag and Drop

Select your files in File Explorer (Windows) or Finder (macOS) and drag them into the 'Drag Files Here' section.

Browse Your Computer

Select the "Browse" button to open your File Explorer or Finder window. Locate and select the files.



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Reset			



Document Notes

Report (Unlinked) file types

This is the document that titleLOOK adds hyperlinks to (prelim, commitment, pro-forma, etc.). This document can be a Microsoft Word (DOC, DOCX) or a PDF file.

The system needs to be able to read and hyperlink text in the PDF or Word file. Refrain from using "locked" PDF files or scans of paper files.

Supporting document file types

All supporting documents must be PDF files.

File size limits

You may only upload 250 files at one time. If you have more than 250 files, load the first 250 (or less) files, Submit the order, and then add the remaining documents in the next step (Review). Please ensure that your Report is included in the first batch of files.

There is a file size limit of 100 MB for any individual file.

Document file names

Ensure your supporting files are named consistently following the file naming format of your company or division.

Make sure the title of your 'Vesting Document' includes "Vested," "Vesting," or "Vest".

Remember that typos in your starting document or file name could cause auto linking to fail.

Staying Organized

Upload only files that are relevant to your order. Uploading additional files that are not referenced can cause extra processing time in the initial order and any updates.



4. Report (Unlinked)

Choose the Report (Unlinked) from the list. The unlinked report may be a commitment, prelim, pro-forma, or other document that you want to add hyperlinks to.

By clicking the down arrow in the selector (1), the full uploaded file list will be displayed, and you can select the appropriate document (highlighted in blue).

You can also type a part of the document name into the search field (2) (e.g., prelim) to return matching documents. This is a major time-saver, especially for orders with many supporting documents.

New Order				œ
Group DEMO		Ove HH	ler ID A-98761	210
Documents				
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985-503075 REC ALL	pdf_1_14	,2021.pdf		4.7 MB
985-858328 REC ALL	pdf_1_14	2021.pdf		4.5 MB
989-1246437 REC AL	Lpdf_1_1	4_2021.pd	et -	9,2 MB
985-2012193 REC AL	Lpdf_1_1	4_2021.pd	1	0.4 MB
990-1914327 REC AL	M.	1 MB 1		
1990-1914328 REC AL	17	0.8 MB		
991-1252707 REC AL	1	8.7 M8		
997-954822 REC ALL	pdf_1_14	_2021.pdf		0.3 MB
997-954823 REC ALL	pdf_1_14	2021.pdf	14	0.9 MB
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Your order is now ready to submit after you have:

- 1. Selected Submit As (if applicable)
- 2. Selected your Group
- 3. Entered your unique Order ID
- 4. Uploaded your documents
- 5. Selected your Report (your prelim or commitment)

5. Submit

Clicking the Submit button starts the processing of your order. You will get a message that your order has been successfully submitted and is processing.

6. Reset

Selecting 'Reset' (bottom left) will completely reset the New Order section, clearing the Order ID and Documents.

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1985-858328 REC /	Lpdf_1_14	2021.pdf	4.5 MB
1989-1246437 REC	ALLpdf_1_14	_2021.pdf	9.2 MB
1989-2012193 REC	ALL.pdf_1_14	2021.pdf	0.4 MB
1990-1914327 REC	ALLpdf_1_14	2021.pdf	1 MB
1990-1914328 REC	ALL.pdf_1_14	_2021.pdf	0.8 MB
1991-1252707 REC	ALL.pdf_1_14	_2021.pdf	8.7 MB
1997-954822 REC A	4L.pdf_1_14	2021.pdf	0.3 MB
1997-954823 REC /	4L.pdf_1_14_	2021.pdf	0.9 MB
CALOSA_1985-0083	\$8327.pdf_1_1	14_2021.pdf	4.6 MB
source-original-link	oed.pdf		0.4 MB
TAXES.pdf_1_14_20	121.pdf	1	52.2 KB
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Once you click the Submit button, you may get the message that an order has already be created with the same Order ID you used.

You will be given three options to go forward:

Cancel

Allows you to edit your newly created order – so you can change your Order ID.

Go To Existing Order

Allows you to pull up the existing order with duplicate Order ID to review. If you select this option, your entries will disappear and you will need to restart the new Order (if this is the path forward after review).

Continue With Submission

This option allows you to overwrite the existing Order. By selecting this, you will erase any manual adjustments that were made in the existing order.

If you overwrite an earlier order and discover that the new order you are submitting is not as current, a previous version will be needed to recreate the more up to date one.





Once you submit your order, it will show up in the 'Order List'.

The Order List shows the orders that match the filters shown by the filter dropdowns (1)

Sorting Orders

Orders can be sorted by clicking the gray arrows next to each column name (2).

The current column being sorted is indicated by the orange descending arrow next to the column name (③). To sort the column by ascending values instead, click the arrow again and it will point upwards.

Searching

Click the Search tab at the top of the screen ((a) to open the search page (Fig. 14).

The Search panel (**s**) allows you to filter all orders by each parameter shown.

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Order Search Parameters

On the Search page, Orders that match your search criteria are displayed.

Users can change the search criteria by filtering based on Date Range, Group, User, Status, Address, etc. (see image to the right).

Don't miss the Order ID tab on the top of the Order Search Panel. Select Order ID to search for a specific order.

Make sure to select Search at the bottom of the Order Search Panel after changing search parameters to update the order list.

Order Search	
Search Order ID	
Date Range Today	•
Groups All Groups	
Users At Users	
Current Status All Statuses	
Address	
Red Flags All	
Search Q	

ORDER LIST - STATUS



The 'Status' will notify you what stage in the process each order is in. You might see one of several statuses, which may change depending on actions taken and updates made to individual orders, documents and phrases.

The statuses that you can encounter are the following:

Docs Upload

System is uploading the documents.

Link Prep

Linking process is occurring by identifying phrases in your document and matching those phrases to documents.

Link Review

The linking process is complete and ready for review. Once reviewed and manual phrases entered and manual links created, the order is ready to process.

New

Order is complete. Will stay in this status until it is opened and then it will revert to complete.

Complete

Order is linked and ready for distribution.

Error

Contact titleLOOK at support@titleLOOK.com.

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ORDER LIST - ACTIONS

Items in the Action column allows users to interact with their orders to complete and publish their orders. If nothing is listed in the Action column, check to see that there isn't an error indicator for the order.

The Actions you will most likely encounter are as follows:

View Order Details

View the summary, phrases and documents that make up the order, make edits and publish updated versions (1).

View titleLOOK

Navigate to the titleLOOK view (2).

Review

In this step you have the option to add missing documents, update any unlinked matches, or add manual phrases to be matched. Once complete, you can re-run the order through the system to confirm before publishing (3).

Publish

Generates the Linked Report. This Action generates the actual linked report document using the documents uploaded and phrases found and/or added (④).

View Linked Report

Navigate to the linked version of the report (5).

View

This indicates that the order is still in the process of being finalized. Clicking 'View' will show the current 'Order Summary' (6).



VIEW ORDER DETAILS



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- **1** Order Details Navigation Panel p.19
- Order ID
- **3** Version Number Indicators
- **4** View titleLOOK Report
- **5** View Linked Report
- **o** View Unlinked Report
- **Order Details Panel**

- **8 Order Summary (selected)** <u>p.20</u>
- **9** Linked Phrases Library p.21
- **Wiew Attached Documents** <u>p.22</u>
- **1** Date of Current Order
- **1** Order Contents
- **B** Flagged Items see titleLOOK Report
- Ource File

- **(b)** Order Group
- **1** Linked and Unlinked Phrases
- **D** Address for Order
- **1**¹ Order Author
- Download Options for Order
- 2 Edit/Publish Order Buttons

ORDER DETAILS NAVIGATION



The 'Order Summary Navigation Panel' gives you quick access to essential information and links for the current order. The Order ID is displayed at the top (1) as well as two version indicators (2) and buttons to guide you through the next steps (3).

Quick Links:

titleLOOK Displays the current titleLOOK summary.

Report (Linked) Displays the current linked commitment.

Report (Unlinked) Displays the current unlinked commitment.



ORDER SUMMARY



The Order Summary tab displays the information from the current version of the Order. To view the details of previous versions of the order, click on the version indicator shown on <u>page 18</u>.

The Order Summary is composed of:

Run Date Last date the order was updated (1).

Report (Unlinked) Displays the current unlinked commitment (2).

Address Property address (3).

Group Group within customer account(**4**).

Submitted by Team member who made latest update (5).

Documents

Identifies the documents that are linked to manual and auto parsed phrases and those that are not (6).

Phrases

Identifies phrases that are matched and unmatched to documents – this includes manual and auto parsed phrases (2).

Document Archives

Download the Report and Supporting Documents from this order (3).

Codebook Items

These are flagged items from the report in need of attention, which will be displayed in the LOOK view ().



ORDER LINKS



The 'Links' tab identifies all phrases in the order and their connection to an uploaded document.

Phrase

The text phrase identified in the documents (1).

Source

Describes how the phrase was identified, typically either 'Parser' (system generated) or 'Manual' (user-generated) (2).

Match Type

Identifies the status of the phrase-document connection (3), described by the following parameters:

- Auto Matched A standard text match. The phrase was located within the document as shown.
- **Complex Auto-matched** A multi-part match. These can be items in a series (ex: "Instrument 123, 456, 789" becomes "Instrument 123", "Instrument 456", "Instrument 678") or a block of content where context it important (ex: The word "Map" found within a section of content that begins with a header of "Lot 123", vs the word "Map" found within a section of content that begins with a header of "Lot 456" - so the context of knowing it is the "Lot 123 Map" vs the "Lot 456 Map" is important.)
- **Manual** A phrase to document match that has been manually created by a user.
- **Forced** A phrase to document match that has been manually created by a user as an override to the system generated association.
- Not Matched The Phrase that was manually added was not found, most likely due to a typo when adding the manual phrase, and so therefore a match could be generated to the specified Document.
- **Unmatched** A document was not found that matched any of the filename patterns that the system was expecting for this phrase.

Match Type help

Easy access to the above Match Type terms (4)

Linked Document

Identifies the document that has been connected to a phrase (6).

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The 'Documents' tab shows all uploaded documents, their details and status of their linked phrases.

File Name

This is the original file name. You can click on the hyperlink to get access to the specific file (1).

Last Modified

States the date and time the file was uploaded or most recently edited (2).

Version

Displays how many copies of that file have been uploaded and when (3). You can view each version of the file. If more than one version exists, a clickable icon (4) will appear next to the version number.

Linked

Identifies whether or not a document has been linked. The 'Report (Unlinked)' will not show a status in the 'Linked' column (⁵).

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EDITING AN ORDER



Once the order is created, it can be revised with the 'Review' action (p.17). If the order hasn't been completed and is in review, you must update and publish the order before gaining access to the titleLOOK tools and resources.

Edit 🕑

Edit

Unlocks the order and allows you to make changes to any order details, related linked phrases or supporting documents in the 'Edit Order' or 'Order Details' panel.



Update

Triggers the system to match all of the phrases with their corresponding documents. *This does not generate the updated linked document but allows for more review and editing without finalizing the next version.*



Publish

Triggers the system to match all of the phrases with their corresponding documents. 'Publish' finalizes the current version and generates the final linked commitment.

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EDITING AN UNPUBLISHED ORDER



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1 Previous Version Summary -

Displays a summary of the last completed version of the order.

- Order Review Table Allows you to add and update Linked Phrases and Documents, and to match them to each other before publishing the order.
- **3 Filter Options** Control which phrases and documents are shown.
- Output: A set of the existing of the exist of the exist.
- Edit Link button Make changes to which document is linked to which phrase.
- **Output** Update/Publish buttons Updating an order will create a new version of the order. You will need to publish the order to access the titleLOOK tools and resources.



EDIT LINKS FOR UNPUBLISHED ORDERS

The 'Add Linking Phrase' button allows for adding new manual phrase for those not identified by the parser.

Enter the new phrase into the 'Phrase' text field (1) and then using the Document selector (2), choose from the currently uploaded documents to manually link to the new phrase before pressing the 'Save' button (3).

Note:

There may be instances where a phrase is typed in exactly as it looks in the commitment and when the order is updated, the link does not stick. Part of the reason could be is that there is underlying formatting code in the commitment that obscures the phrase. Copying the text straight from the document may reduce this chance of error.

	-
Add New Manual Phrase	Fig



EDIT DOCUMENTS

The 'Add / Update Document(s)' button allows for adding new or updated documents to your order. Use one of the following methods to find and upload the correct files to your Order and refer to the notes on Documents on <u>page 10</u> of this user guide.

Drag and Drop

Select your files in File Explorer(Windows) or Finder (macOS) and drag them into the 'Drag Files Here' section (1).

Browse Your Computer

Select the 'Browse' button to open your File Explorer or Finder window. Find and select the files (2).

