# titleLOOK®

## User Guide Version 1.1

**The Leader in Digital Title**

www.titleLOOK.com

Copyright© 2023 Mainspring Services

www.MainSpringServices.com

# TABLE OF CONTENTS

titleLOOK®


**2 Interface Map**

**3-5 Quick Start Guide**
3 Login
4 New Orders
5 Order Review
5 Publishing

**6-13 New Order Panel**
7 Groups
8 Order ID
9 Documents
10 Document Notes
11 Report (Unlinked)
12 Submitting your Order
12 Resetting the Panel
13 Duplicate Order IDs

**14-17 Order List**
14 Sorting & Searching
15 Search
16 Order Status
17 Actions

**18 Order Details Interface Map**
**19 Order Details Navigation**

**20 Order Summary**
**21 Order Links**
**22 Order Documents**

**23-26 Editing an Order**
24 Unpublished Orders
25 Editing Links
26 Editing Documents





*Contact:* support@titleLOOK.com

*Software by* ***Mainspring Services®***

# USING titleLOOK®



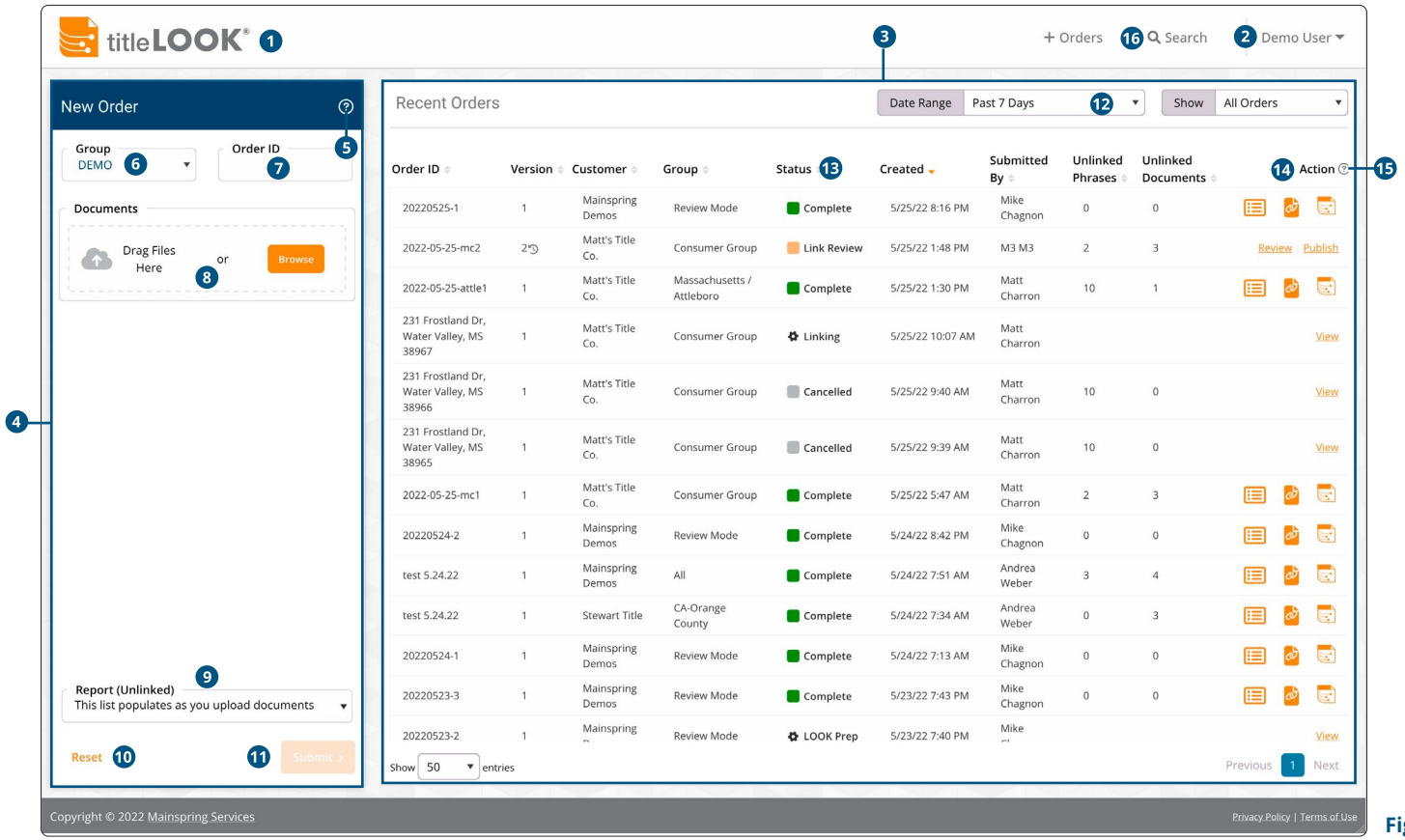



Fig. 1

1. **titleLOOK logo** - Links to homepage
2. **Username** - Access to user settings and privileges
3. **Order List** - List of all orders you have access to - p.14-17
4. **New Order Panel** - Entry form that allows you to create a new order - p.6-13
5. **New Order Help** - Starts information layer overview
6. **Group Selector** - Picker for which group to use for the order - p.7
7. **New Order ID field** - Entry field to create a new distinct order - p.8
8. **Document Selector** - Drag and drop or browse to documents to upload and link - p.9
9. **Starter Document Picker** - Selector to set your starting document that documents will be linked to - p.9-10
10. **Reset New Order Panel** - Clears form and deletes uploaded documents - p.12
11. **Submit New Order button** - Submits and begins processing new order - p.12
12. **Filter buttons** - Buttons to set display filters to the Order List - p.14
13. **Order Status** - Shows the status of each order in the Order List - p.16
14. **Order Actions** - Quick links to actions that can be performed on an order - p.17
15. **Actions Help -** Displays information layer for common actions
16. **Search -** Use to find specific orders by any parameter - p.14



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

## 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.

Fig. 2

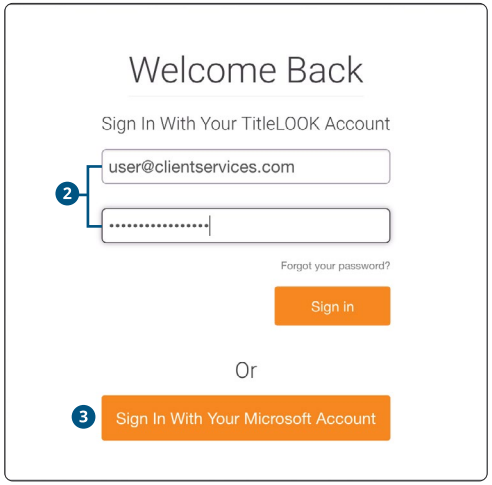



Fig. 3

## 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.

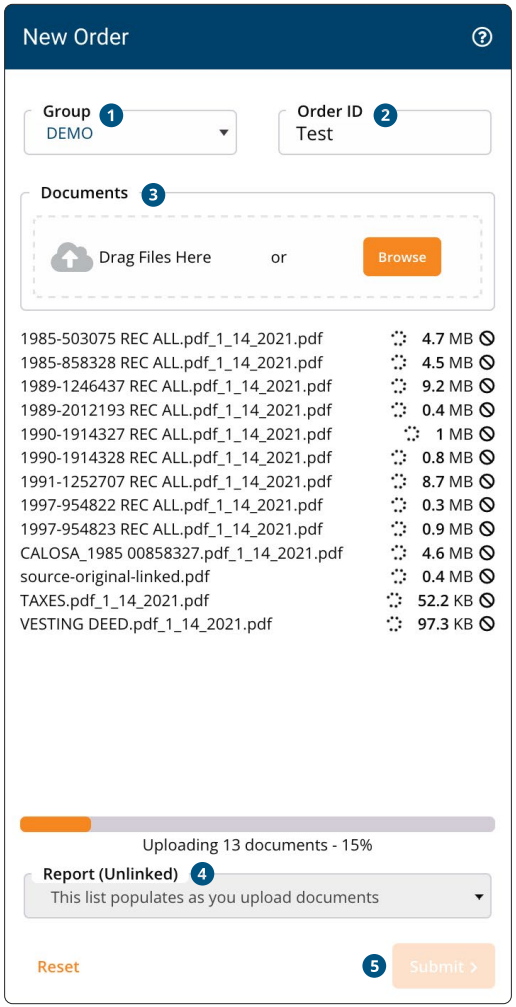



**Fig. 4**

Your Order will now transfer to the Order List (seen on page 14). To review, edit and publish your order, click on the Review action (seen on page 17) 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.

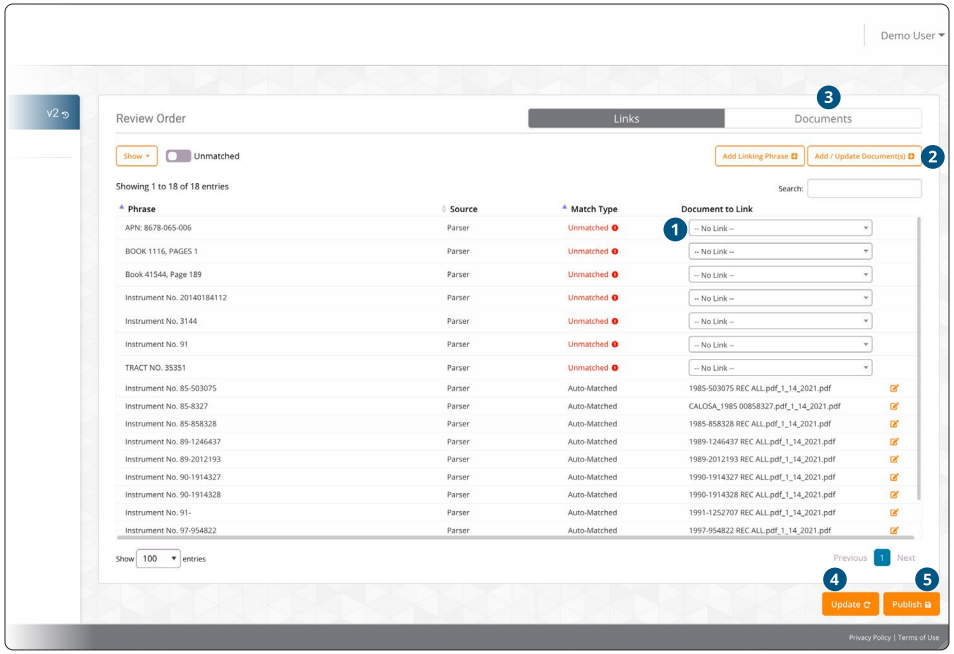



Fig. 5

## 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 (4) and then publish it by clicking on the 'Publish' button (5).

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

# NEW ORDER PANEL

This section is used to create all new orders.

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

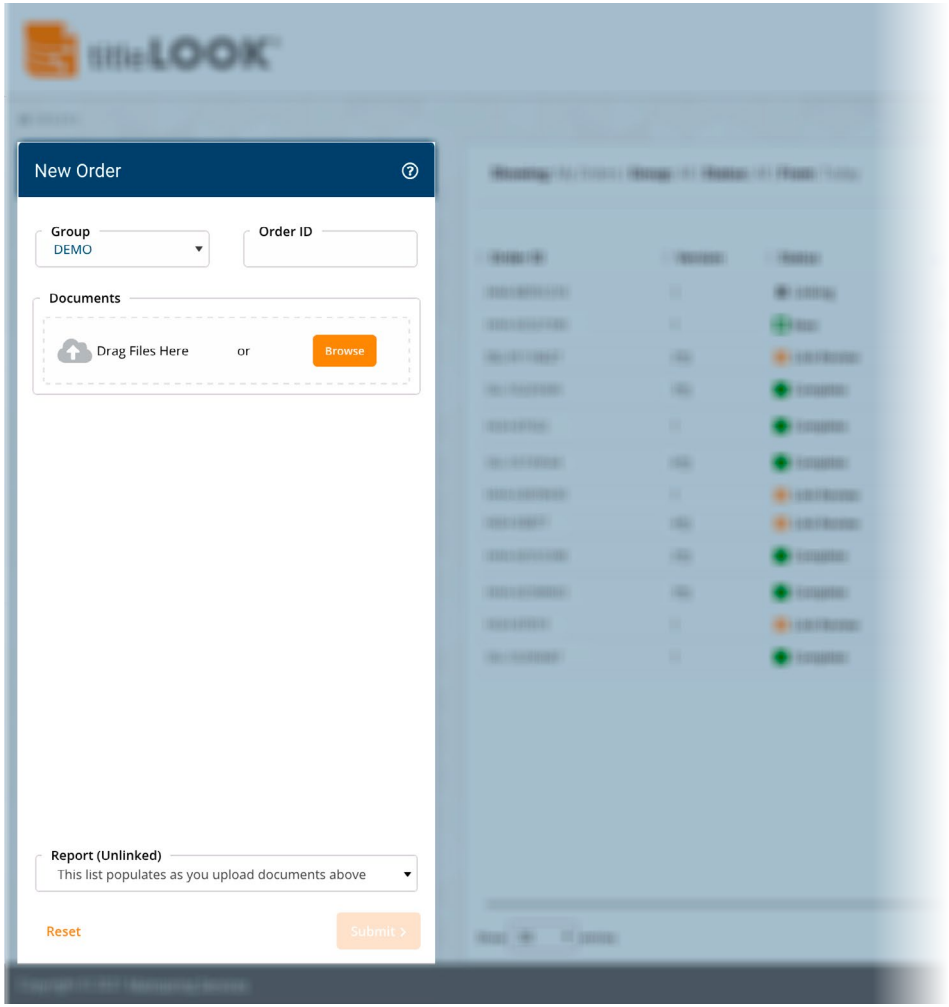



Fig. 6



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

# MAKING A NEW ORDER

## 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.

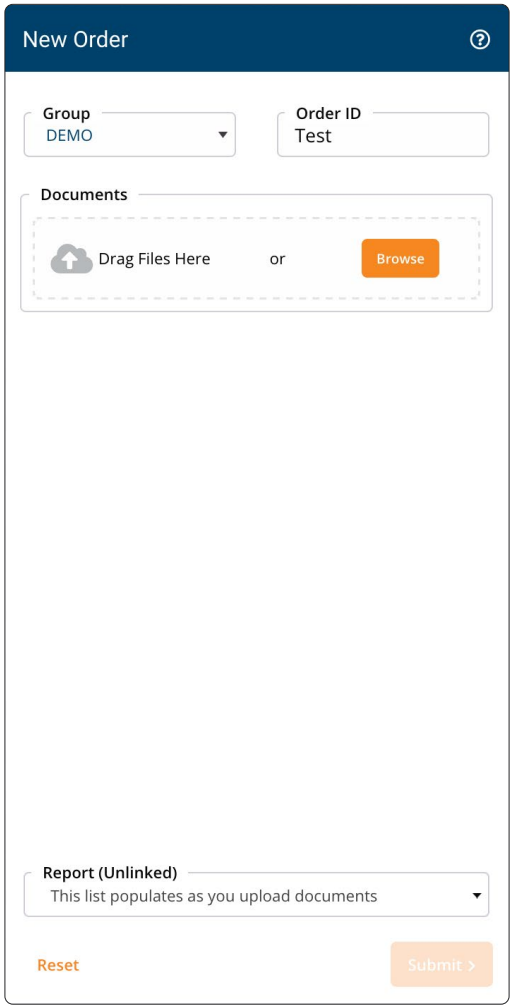



Fig. 7



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

## 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.

Any special characters will be converted to an underscore (_).

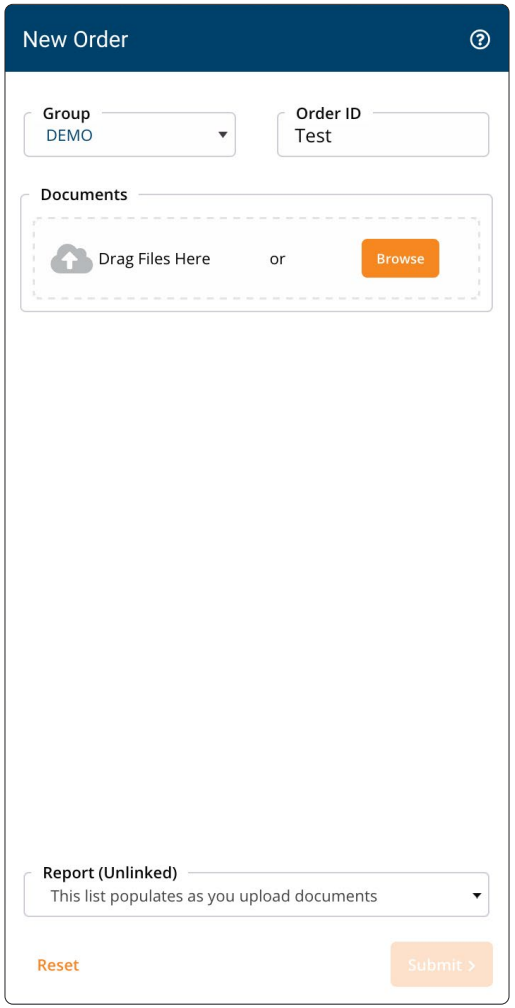



Fig. 8

## 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.

If a users documents are organized in sub-folders, the file structure of the top-level folder will be maintained when a user drops it into this section.

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

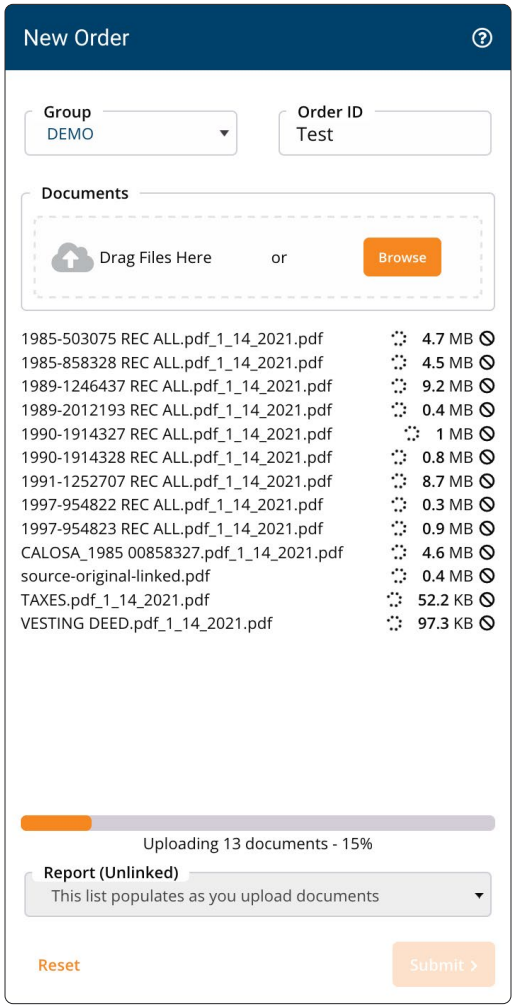



**Fig. 9**

## 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**
Compatible file types are: PDF, DOC, DOCX, TIFF, JPG

**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.

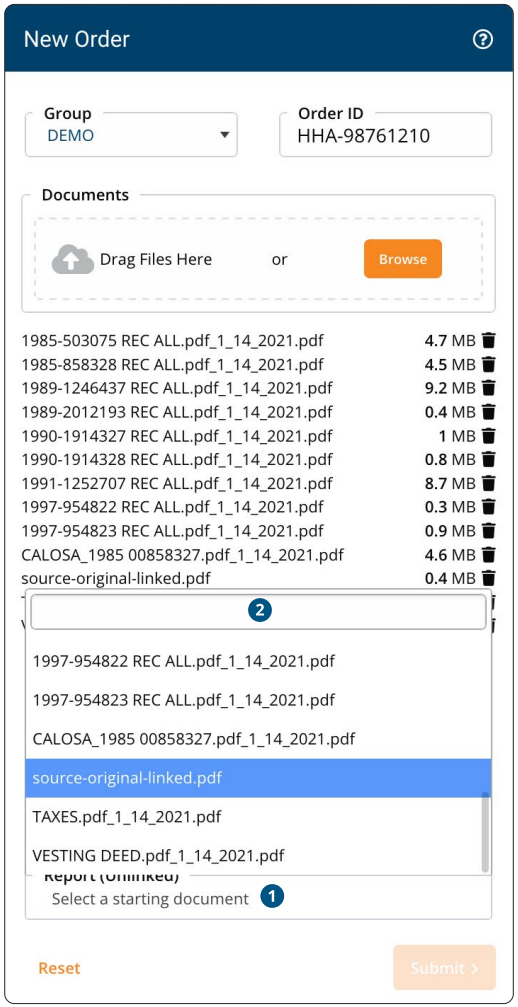



Fig. 10

# MAKING A NEW ORDER

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.

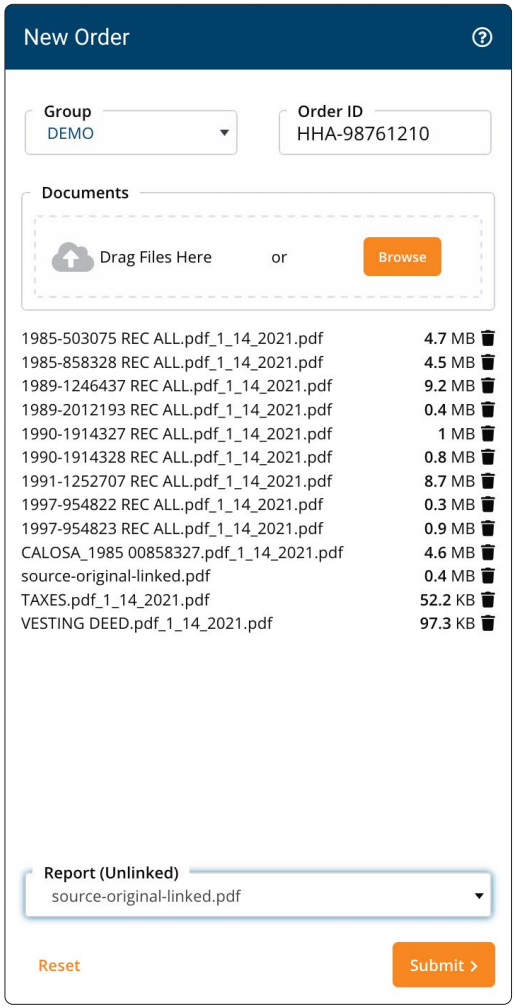



**Fig. 11**

# DUPLICATE ORDER IDs

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.

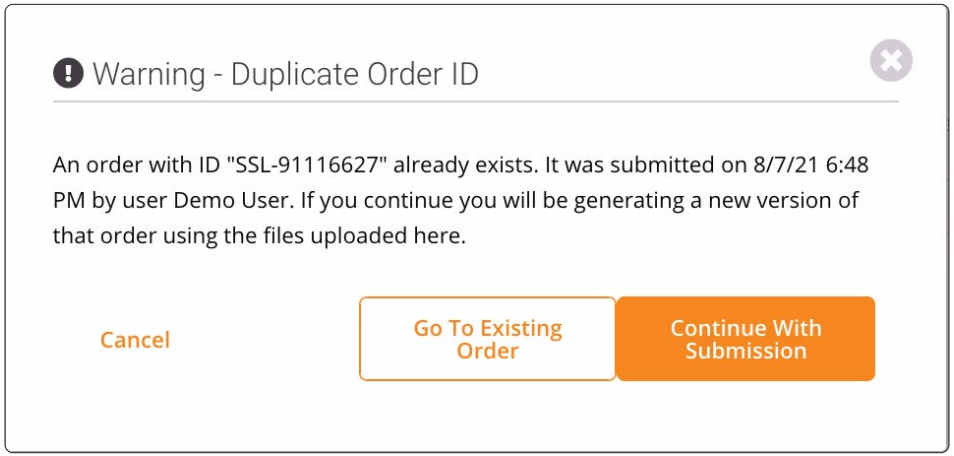



Fig. 12

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.

# SORTING & SEARCHING

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 (4) to open the search page (Fig. 14).

The Search panel (5) allows you to filter all orders by each parameter shown.

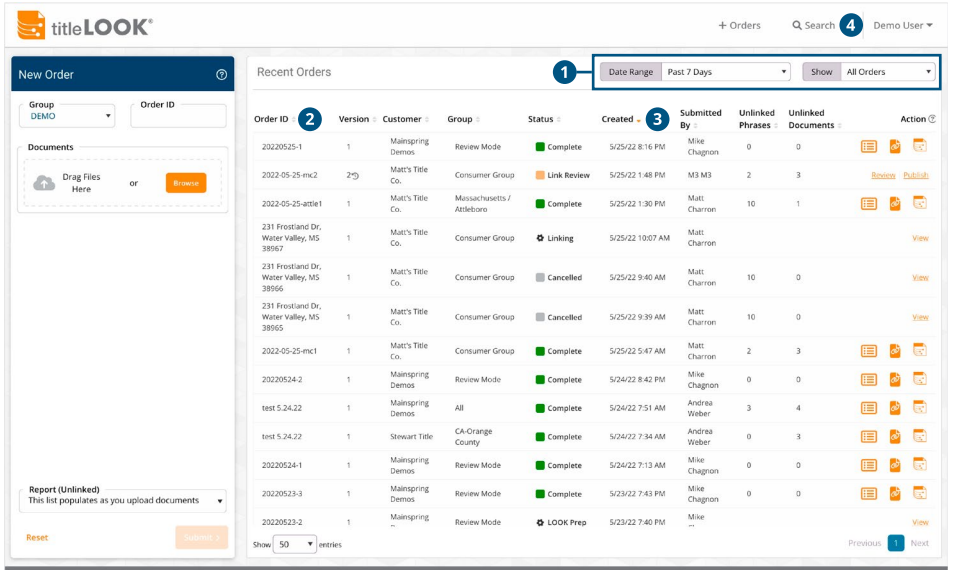



Fig. 13

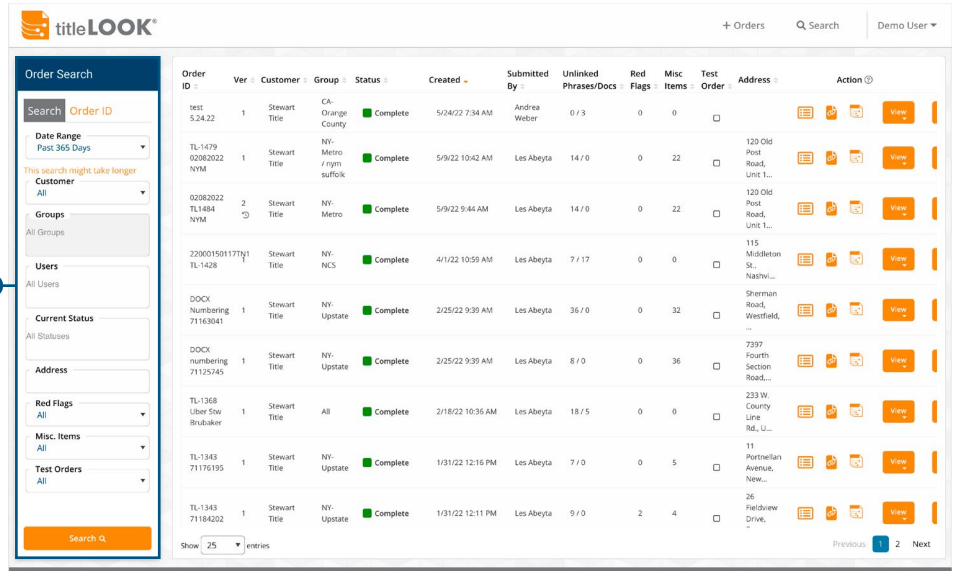



Fig. 14



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

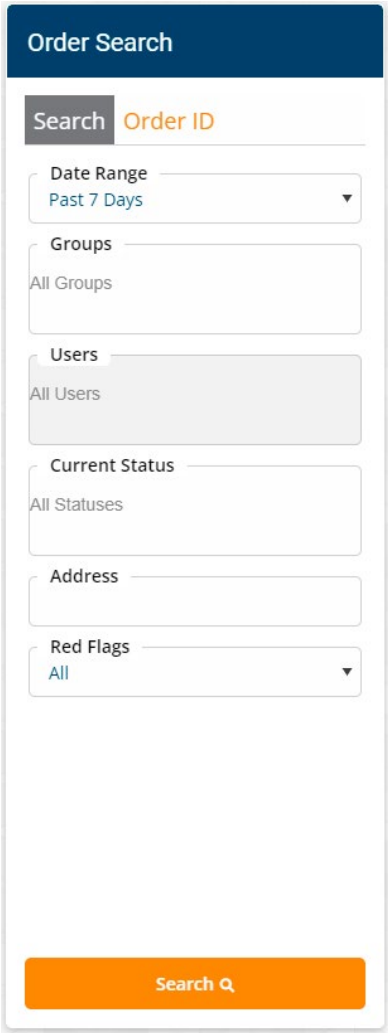
## Order Search Parameters

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 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.

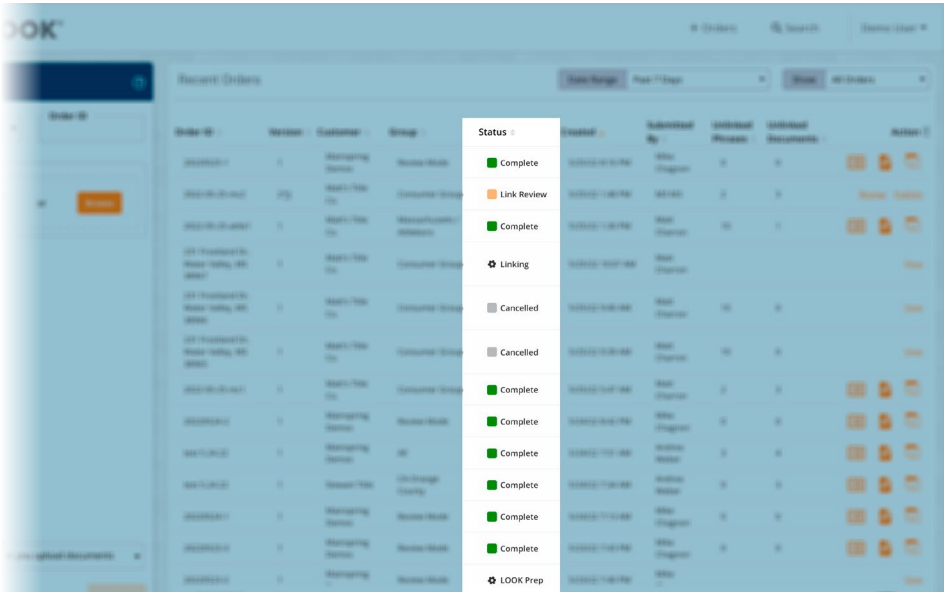



Fig. 17

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.

# 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).

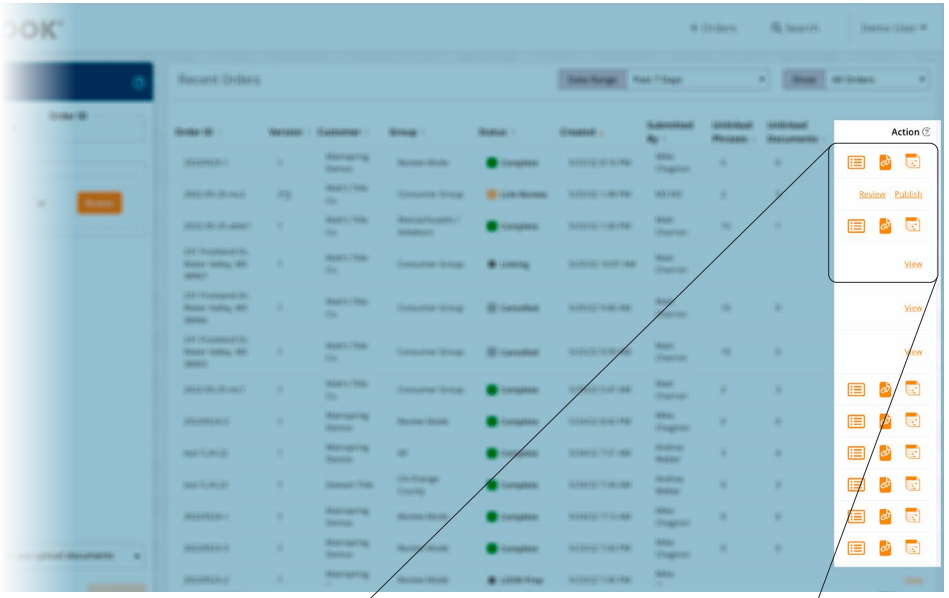



Fig. 18

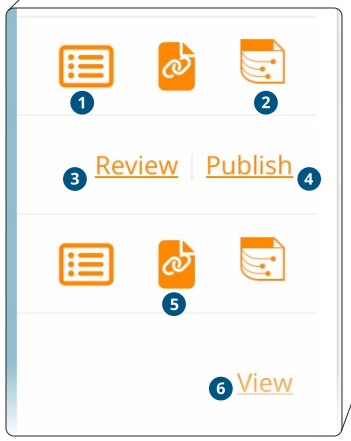



Fig. 19



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

# VIEW ORDER DETAILS

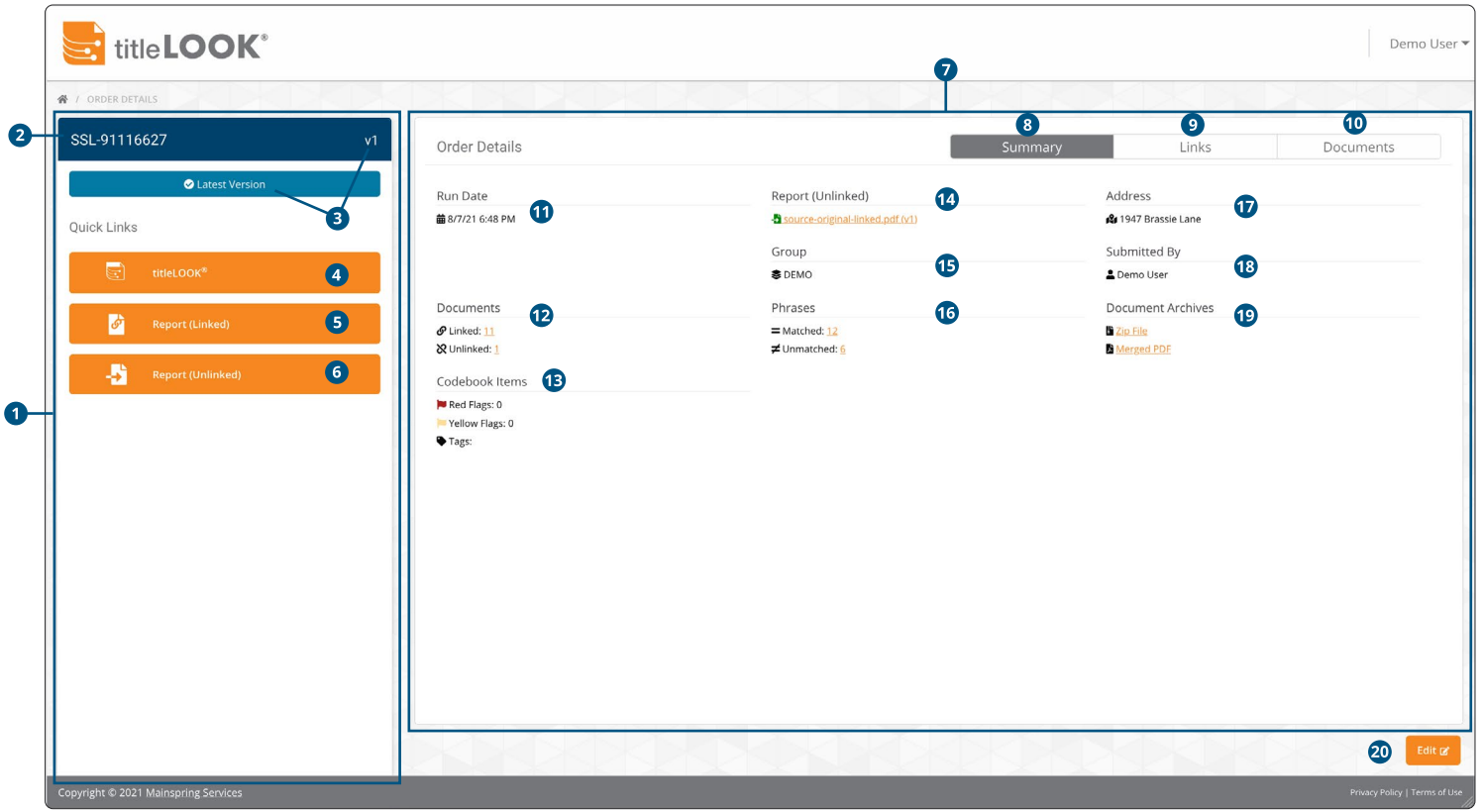



Fig. 20

1. **Order Details Navigation Panel** - p.19
2. **Order ID**
3. **Version Number Indicators**
4. **View titleLOOK Report**
5. **View Linked Report**
6. **View Unlinked Report**
7. **Order Details Panel**
8. **Order Summary (selected)** - p.20
9. **Linked Phrases Library** - p.21
10. **View Attached Documents** - p.22
11. **Date of Current Order**
12. **Order Contents**
13. **Flagged Items** - see titleLOOK Report
14. **Source File**
15. **Order Group**
16. **Linked and Unlinked Phrases**
17. **Address for Order**
18. **Order Author**
19. **Download Options for Order**
20. **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).

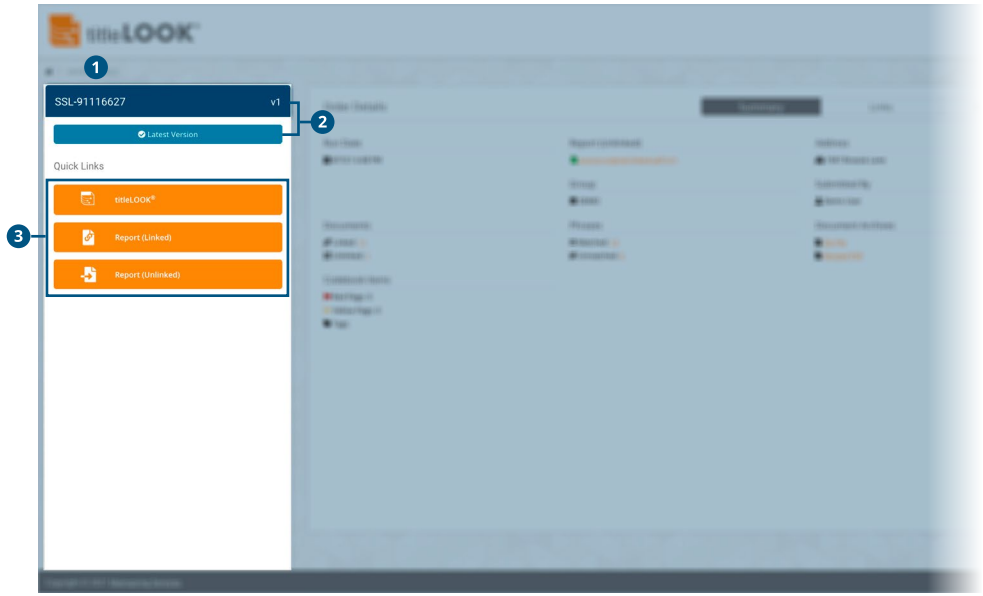



Fig. 21

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 page 18.

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 (7).

**Document Archives**
Download the Report and Supporting Documents from this order (8).

**Codebook Items**
These are flagged items from the report in need of attention, which will be displayed in the LOOK view (9).

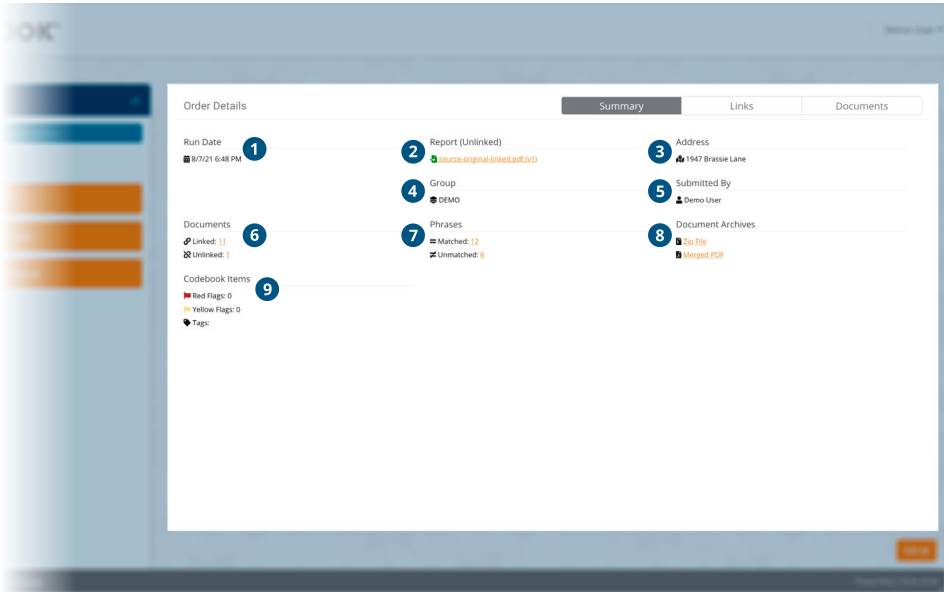



Fig. 22

# 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 (5).

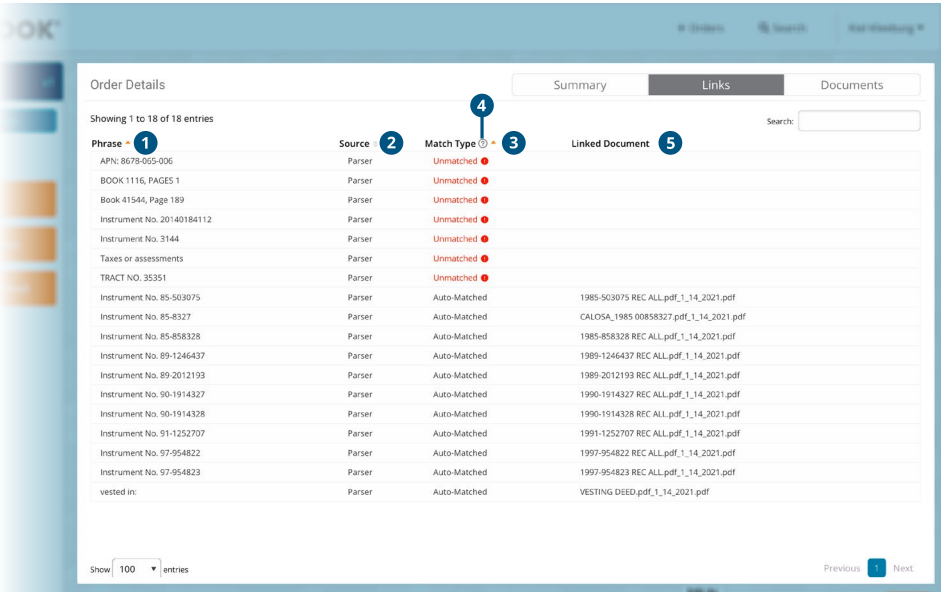



Fig. 23

Fig. 24



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

# ORDER DOCUMENTS

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).

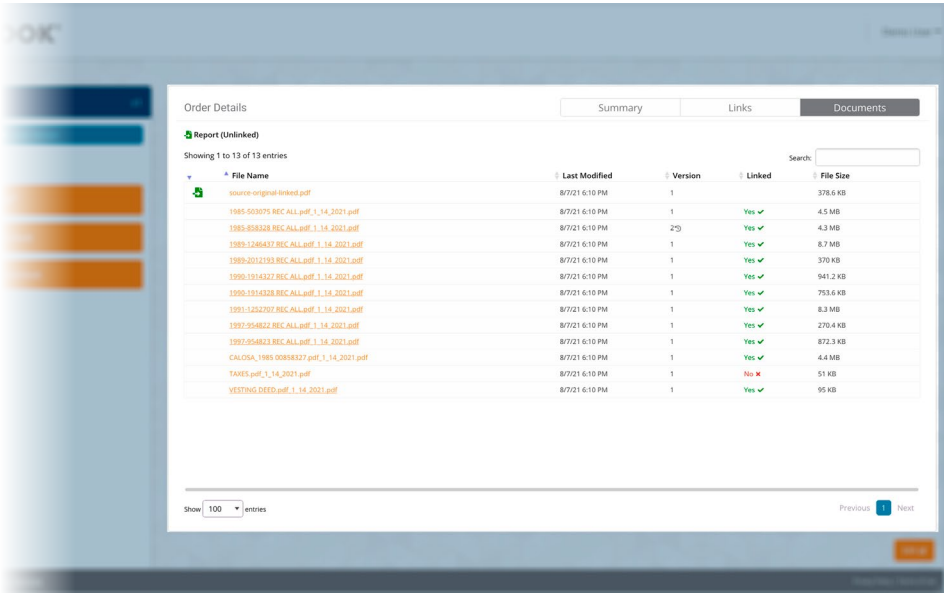
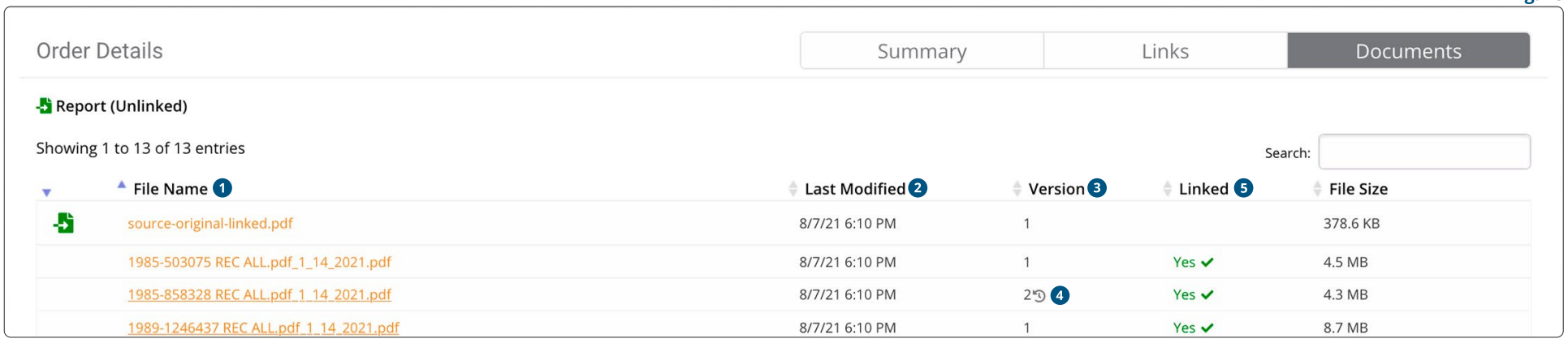



Fig. 25

Fig. 26



# 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.

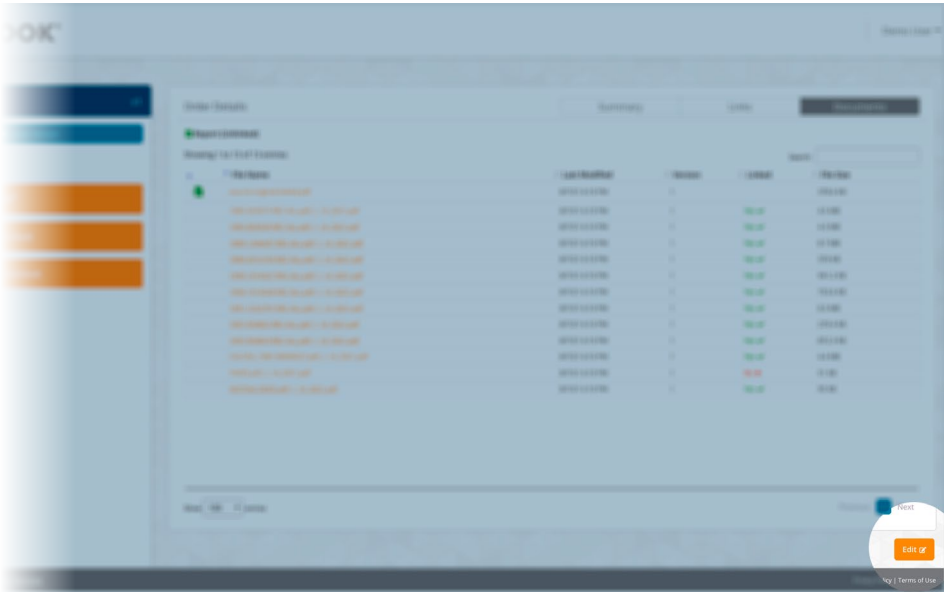


Fig. 27

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

**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

**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.



*Contact:* support@titleLOOK.com
*Software by* ***Mainspring Services®***

# EDITING AN UNPUBLISHED ORDER

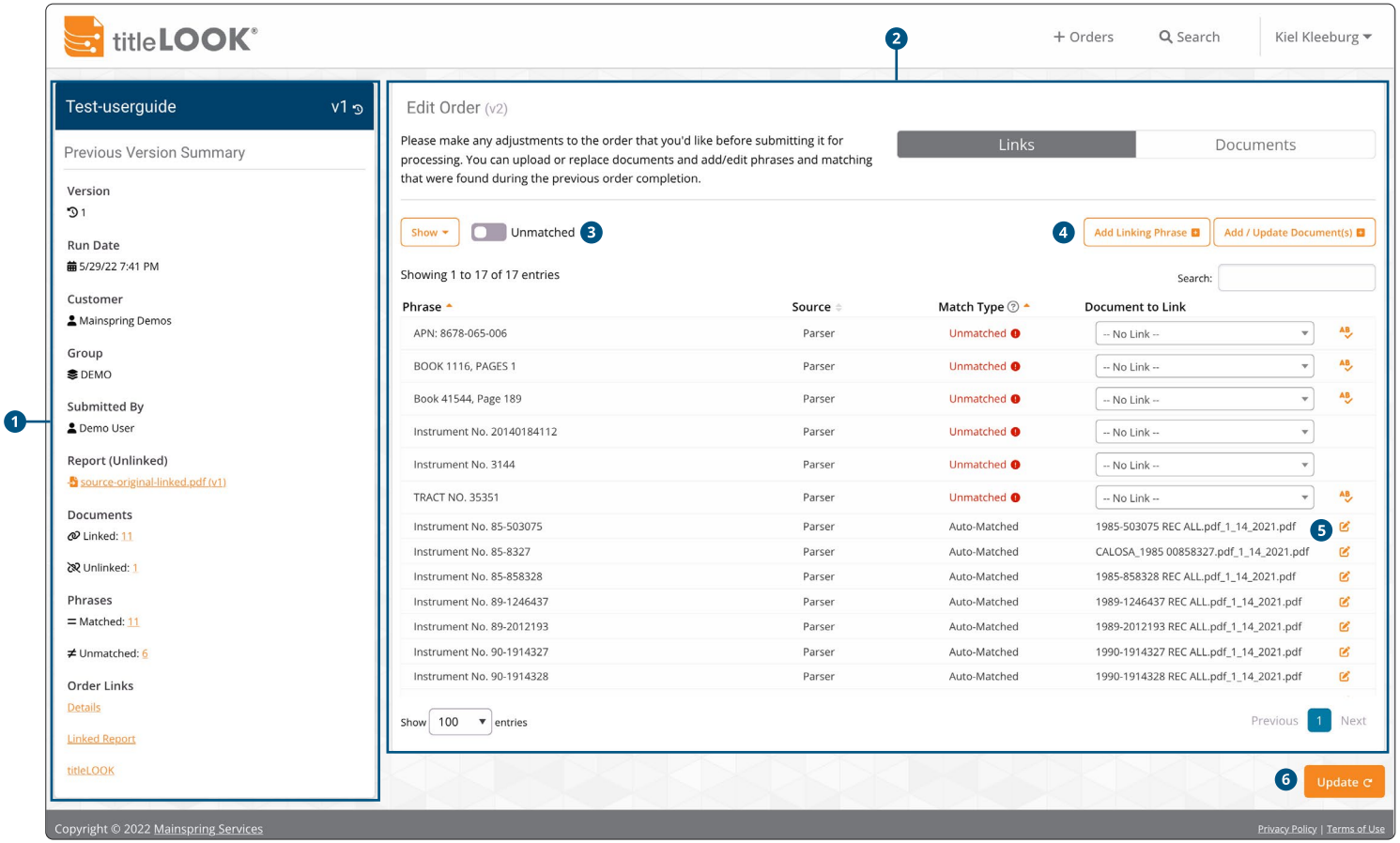



Fig. 28

1. **Previous Version Summary** - Displays a summary of the last completed version of the order.
2. **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.
4. **New Phrase/Documents buttons** - Allows you to add to or edit the existing group of linked phrases and documents for the order.
5. **Edit Link button** - Make changes to which document is linked to which phrase.
6. **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.*

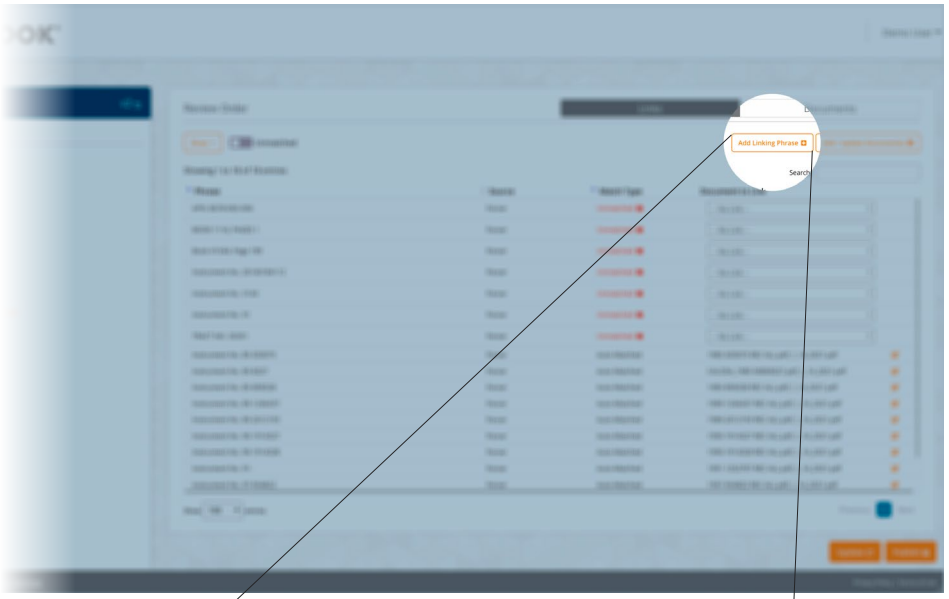



Fig. 29

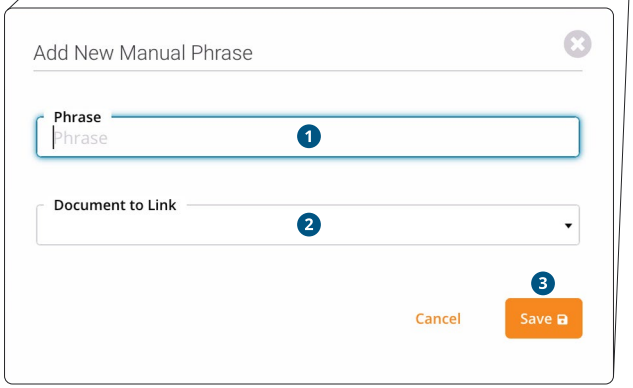



Fig. 30

# 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 page 10 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).

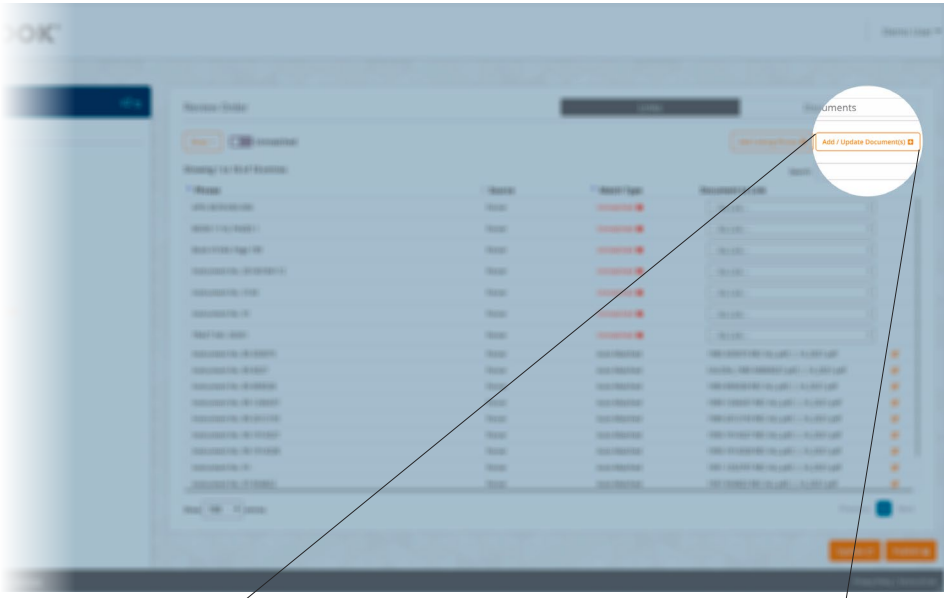



Fig. 31

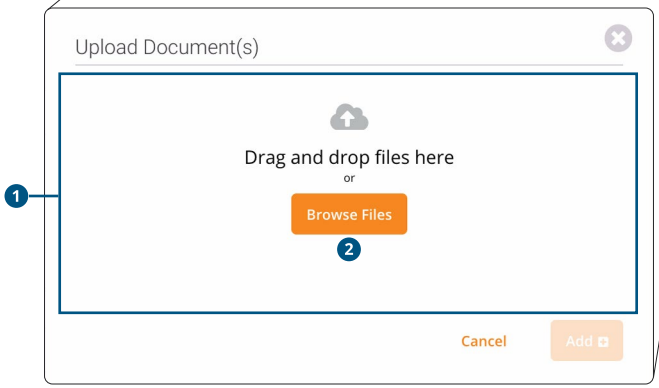



Fig. 32