

Innovations to GO BEYOND

TITLE DATA and AUTOMATION

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# DATATRACE TEXAS FAQ - ADI

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## Name Search - Individual Name, Business/Trust, and All Names Search (Title Services)

- ❖ General Name = Search in system for all documents posted without legal
- ❖ Grantor/Grantee = Search in system for all documents posted WITH legal
- ❖ True Grantor/Grantee = Search in system for all documents posted with name (with & without property)
- Wildcards allowed when searching General Name/Grantor-Grantee/True Grantor-Grantee = \* and ?
  - ? = Replaces 1 character within a name
  - \* = Will search everything that **begins with** the characters of the name prior to the \*. This **can be used** in **general names when searching an individual**. Please remember wildcards can't be used in the first name field.
    - Example: **Rodger\*** (last) **Aaron** (first) – returns everything with last name that begins with Rodger with first name of Aaron
  - **If you use \*** at the end of the **business name**, then DTS will **ignore the “Contains logic” as well as ignore “Soundex logic”**. When \* is used the system will deliver back all documents that begins with the information prior to the \*.
    - Example (company abbreviation):
      - Enter **University Texas** - returns return **Univ Tx, University of Texas, University Texas, etc.**
      - Enter **University Texas\*** - returns only items that begin with those characters typed.

- Example (contains logic – company names only):
  - Enter **Dairy Queen** - returns return **Austin Dairy Queen Stores Inc, Cox Dairy Queen, Dairy Queen, etc.**
- Example (expand word logic):
  - Enter **Dair Queen** - returns return **Austin Dairy Queen Stores Inc, Cox Dairy Queen, Dairy Queen, etc.**
- If the **business name ends** with **terms like** LLC, Limited Liabilities Company, Company, CO, CORP, Corporation, or Professional Association please **don't include that part on entered name.**
  - Example: Enter **Cherrywood Austin** - returns **Cherrywood Austin LLC**
- AND, &, or neither.
  - Example: Enter **Baccus and Roessler** - returns **Baccus and Roessler LLC, Baccus Roessler LLC**
  - Example: Enter **Baccus Roessler** – returns **Baccus and Roessler LLC, Baccus Roessler LLC**

### Name Delimiters – (Subdivided search)

- Party name qualifier used on Subdivided search will delimit the search to bring back only results that contain the name keyed as the delimiter.
- Party Last/Company is most used
- Wildcard is strongly recommended (\*)
  - Example: Enter **Rodger\*** (no first, no middle, and no role) – returns all documents for that **specific legal** with individuals with last name **Rodger, Rodgers**, any that **begins with last name Rodger**, along with any **company or trust that begin with Rodger**

### Name Delimiters – (Enhanced Abstract)

- Party name qualifier used on Enhanced Abstract search will delimit the search to bring back only results that contain the name keyed as the delimiter.
- Party Last/Company is most used
  - **Wildcard should NEVER be used** in the name delimiter field
    - Example: Enter **Scott\*** (No first and No middle) – returns no results
  - Suggestion to type less of the Party Last/Company name
    - Example: Enter **Dallas Specialist** – returns all documents that begin with **Dallas Specialist**
    - Example: Enter **Nichol** – returns all documents that **begins with last name Nichol as well as any company that begins with Nichol**

### Subdivided – (recommended searches)

- Subdivided - Standard
- Deed of Trust Reference Search – (if not automatically ran)

- Owner name in General Name

### Acreage/Abstract – (recommended searches)

- Abstract Number (all counties)
  - **Enhanced Abstract**
    - **Delimiters are available but not required.**
    - Delimiters can be used prior to submitting the search as well as after submitting the search.
    - Delimiters available are name, amount of acreage, document type, and/or begin date.
    - Date down results are found within the Enhanced Abstract window.
- **Travis County go forward acreage (5/1/1982 to current)**
  - Subdivided Search (using the CAD# for the search parameters)
    - Sample: CAD# 01-5855-0282-0000 Entered as: Plat 15855 Lot 82 Block 2
- Deed of Trust Reference Search – (if not automatically ran)
- Owner name in General Name
- **If you would like an Abstract starter** to be stored in the system, you will need to **MANUALLY** add this using **DISPLAY/MAINTAIN STARTER** option from the Services Panel.
  - Suggestion – Use optional fields within Display/Maintain Starter to add valuable information that will be stored with the starter.
    - Maintenance Action: **Add**                      Select Parameter: **Abstract**  
 Order: GF number                                      Title Officer: optional  
 Abstract: Abstract #                                      Acres: optional                      Party Name: optional  
 Starter Date: MM/DD/CCYY                      Remarks: optional                      **“submit”**

### Updating Enhanced Abstract

- Select Datedown
- Type in your **GF #** press **“submit”**
- Your **name results** will display in the history panel of **DTS** and your **Abstract results** will be delivered through an **EA Abstract screen**.

### Starting a search from a Subdivided or Abstract legal

- Select Title Options Subdivided or Abstract
- Type in your GF # and Legal description, press Add
- Select General Names from the search parameters drop down box. Enter your names, press Add, then submit

### Starting a search from an Instrument Number or Book and Page

- Select Title Service option **“Instrument”**
- Type in your **Instrument #** or **Book and Page**, then enter or **“submit”**
- On results **right click** on legal description, select **“Title”**
- On results **right click** on Names, select **“General Name”, “Grantor/Grantee”** or **“True Grantor/Grantee”**
- Press **Add** (or **“Alt +”** if you are a keyboard user)
- Add GF (order number) in the Order field and press **enter** or **“submit”**.

### Batch Imaging (when looking for an Image document only)

- Under Miscellaneous Services select Batch Imaging

- Choose the type of document you would like to see by selecting in the drop-down box.
  - Make your selection from the type drop down
    - Example Caldwell Plat Map – Map Book: **11** Page: **340** Press **Enter** or **“submit”**
  - If you have multiple to request of the same type you can press **“add”** (or if you are a keyboard user, you can press **“alt &+”** at same time)
  - Image will be found in the history panel - click on the document listed under the words **“batch images”**

### **“ORDER HAS BEEN CANCELED” messages**

- This message means that the order number can’t be used again until after the Data Trace billing cycle has completed (last day of the month). To perform the search parameters, you will need to use the same order number followed by **A**.

### **How to copy parameters from a closed order (GF)/starter record to create a new order (GF)**

- Under Miscellaneous Services select **Display/Maintain Starter**
  - Maintenance Action – select **“display”** and **type in the GF (order number)** press submit (enter)
  - **Click** all parameters that you would like to copy – turning them **red** – then press **“add”** (if only selecting **some parameters**) – press **“add all”** if you want **all parameters** selected
  - This carries the information over to a search screen with the parameters located in the **“title services parameter(s) area**. **Add new GF** (order number) and press **submit** (enter).

### **How to extend the time of open GF (order number) after it was opened (keep open longer than 365 days)**

- Under Miscellaneous Services select **Display/Maintain Order**
  - Type in your **existing GF** (order number) and press **“INDEX”** (lower right-hand corner of the screen)
  - Click on the **+ (plus)** in front of the **GF** (order number) and this will expand order information
  - Where it states **“Keep Order Open Beyond”** – **change the NO to Yes** and then **press update**
  - You must remember to press **“UPDATE”** afterwards for the change to take affect (located at bottom of screen)

### **How to add property or name to existing search**

- Choose the search type needed from the **Title Services** menu
  - Type in your **existing GF** (order number) and your **new search information** – press enter or **“submit”**
  - This will add the new information to your existing GF (order number) as well as provide you historical information on the parameters added.

### **How to remove a parameter from an existing GF**

- Under Miscellaneous Services select **Display/Maintain Order**
  - Type in your **existing GF (order number)** and press **HISTORY** (lower right-hand corner of the screen)
  - Click on the **+ (plus)** in front of the **GF** (order number) and this will expand order details
  - **Uncheck “create a starter”** and **uncheck “permit date down”** for the parameters you would like removed. After they are unchecked, **press “UPDATE”**
  - This will **remove** the parameter from any **future date downs** and **no starters** will be created on land **parameters removed**.

### **How to locate a STARTER**

- From the **Service Panel** under **Title Services** select **Subdivided or Abstract**
  - Type in your legal description

- From the **Doc Type Filter** select “instruments”
- This will open a field to where you can type **STR** – then press enter or “**submit**”
- This will provide you with a search of **only STR documents** that are located on the property you searched.

### **How to retrieve only Starters, Open Orders, and Comments only when using EA (Enhanced Abstract)**

- Select Enhanced Abstract
  - Enter EA order abstract without delimiters
  - In results screen, select **NONE** for doc types and press “**filter**”
  - Click “**save**” and **enter a search name** (starters) and press “**save**” again
  - Go to “**view history**” tab and **check box** next to your **saved search** name
  - Then press “**create a report**”
  - **Once completed** then you can **export, display/print or email**