



Welcome to INTELLA TALK. This newsletter provides information on the latest software products, product updates, technical tips and related news for the benefit of TitleSoft's user community.

PRODUCT SPOTLIGHT

INTELLAprint Automated Document Management



How many times have you received a phone call from a lender, or borrower asking for a copy of a title policy for a file that closed months ago, or longer? And how many times was the policy conveniently located; waiting for someone to request it? Or, how many times have you had to request, or pull the physical file from storage, hunt down the specific documents required, then scan and e-mail them out? Possibly the answers are: "often," "never" and "yikes, not again".

Here's some good news... TitleSoft's INTELLAclose software solution now has the ability to drop & drag a variety of file types to include PDF's into system files. Thus, when research requests hit, you're able to immediately email out documents directly from within the system. So, if you're not currently utilizing this capability and want to learn more, simply contact TitleSoft Technical Support on this powerful, yet under-utilized platform feature.

Now even better news... To richen things-up further, TitleSoft recently introduced **INTELLAprint**. A premium new module for the INTELLAclose system that allows users to more expeditiously print documents and store desired records (PDF files) automatically, in a seamless step. Thus, system users are no longer required to print documents using a third-party print utility, and thereafter drag each document to the TitleSoft master file. Simply print the document – and done. But wait, there's more and where it gets interesting.

Let's say you're on the county tax collector's website researching tax records for a subject property. You're able to print the website tax information – AND IT'S AUTOMATICALLY SAVED TO THE INTELLA SYSTEM FILE.

Receive an e-mail that is vital to the file? Print it – AND IT'S SAVED TO THE FILE.

In fact – anything the user prints is AUTO-MAILED to the active TitleSoft system file.

And just when you think it can't get any better; it does. INTELLAprint allows the system user to build a document from multiple print sources and save the result to a single PDF file. Print a Commitment – QUE IT. Print the accompanying exception documents – QUE IT (they follow the Commitment). Print the tax information, or the property appraiser's information from their website – QUE IT (they follow the commitment and other documents already queued). Finally, the document package consisting of the series of documents originated from multiple sources are painlessly and quickly saved to a single PDF file to email, or is available to post to the web.

If you are interested in learning more about INTELLAprint, please contact TitleSoft Technical Support to schedule a short demonstration. You will be pleased you did.

PRODUCT SPOTLIGHT

Best Practices – Workflow Series {Vendor Management}



Anyone using the traditional scheduler feature in INTELLAclose knows its value to include providing a precise mission-critical timeline to best manage events and activities as assigned by day, week, and/or month.

But this area has been recently expanded and updated to an entirely new level of sophistication to guide the organization through the maze of events and tasks to include applying forward workflow-logic to more successfully manage front-to-back production.

In this Newsletter, we will be focusing on "Vendor Management" whereas the INTELLAclose platform will assist the user quickly and accurately identify preferred product and/or service providers required to complete title searches, surveys... and in general satisfy all processing requirements.

For example, let's assume you need to order a survey for a property located in Orange County, Florida. And let's suppose there are 3 survey companies typically used to service Orange County, and numerous others that don't. How are you going to remember which land surveyors to contact?

The good news is you no longer have to recall who's-who. INTELLAclose will automatically show only the 3 (of limitless options) surveying companies that offer services in Orange County, Florida. In fact, any county, in any state may be setup to identify only those vendors that satisfy your production requirements.

Thereafter, once the vendor is selected, the file will contain all contact information for the survey order and the date it was ordered. Should you need to see who the land surveyor is, or need to call or email them, simply select the **Additional Contacts** screen and *click* on the surveyor tab. Here, the company details will be displayed as well as other pertinent order information.

Taking this to another level, let's assume you have numerous survey companies to choose from. How do I identify the best company? Well, the title organization now has the ability to rank its vendors from most to least preferred. Alternatively, you may rank vendors using any criteria desired to include best response times and more. You also have the ability to limit the number of monthly orders assigned to any one particular vendor, and once this limit is hit no additional orders may be placed until a new month opens.

You're now probably thinking this is all wonderful, but it must be hard to configure in INTELLAclose? While there's some busy work, once the data and associated logic is established the benefits are measurable. Further, to simplify setup it's helpful to know which companies (and company types) you want the system to manage and have all of your vendors entered into the systems' Rolodex.

Contact TitleSoft Technical Support to have a short demo of this powerful new capability to include working with us to setup sample logic so you may thereafter establish your own specific vendor management criteria.



TECHNICAL GURU

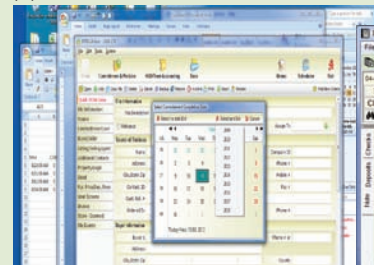
INTELLAclose User | System Tips



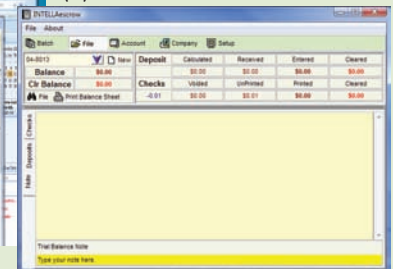
- ✦ Exception Errors – Typically requires a *reboot* of the user's Workstation to fix.
- ✦ Flush Error – Typically requires a *reboot* of the Server to fix.
- ✦ REORG still running – From Server, task manager out of IACFILES and then restart it.
- ✦ Users don't have to be on the "store" screen when dragging & dropping documents for storage. Rather, simply *drag & drop* to the file on any screen.
- ✦ You may use a "fill in" field in your documents for information that is pertinent to the document, but is not necessarily information that is stored.
- ✦ While preparing items for bank reconciliation you may either *double-click* on the item, or highlight it and use the space bar. You may also prepare a "sequential range" of check numbers at one time by *clicking* on range and entering the starting and ending check numbers, then *clicking* enter.

- ✦ You're able to restore a deleted file by *clicking* on "Restore," *click* on "Deleted Folder," and select file, and *click* "Restore and Close."
- ✦ It's best to *select* payee names from the Rolodex as differences in spelling the same name may cause multiple checks to be generated in the file, and the file will be out of balance.
- ✦ While in the calendar you can *click* on the month or year to select your date from a drop down list, or use the arrows located at top of screen. (A)
- ✦ You may type a note that will show on the Trial Balance Report by clicking on the note tab in the file and typing in the Trial Balance Note section at the bottom. (B)

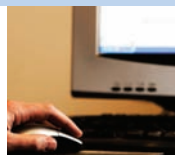
(A)



(B)



NEWSWORTHY



CFPB Final Ruling

TitleSoft is well-along with the software development required to incorporate the Consumer Financial Protection Bureau's mandates driven by their massive 1099-page preliminary regulations and 2013 Final Ruling. The major technical and administrative areas of significance include a NEW 3-page Loan Estimate and 5-page Closing Disclosure that industry must implement by August-2015. This will replace the current HUD & GFE we have all come to love (or not).

TitleSoft's formal software update plan is to have all required workflow logic available for clients well-ahead of the 2015 deadline to include the ability to toggle between the current and future system workflow, so organizations have adequate time to prepare for the complex transition. Further, preliminary availability may be as early as the third-quarter of 2014. And TitleSoft will be holding a series of informative Webinars to best support the planned system update in the same timeframe. So rest easy, all of the complex technical bases are well-covered!

TitleSoft Reconciliation Services

Whether you're a smaller organization that does not have adequate staff to consistently take on reconciling accounts each month, or a larger group that prefers not to contend with the task for whatever reason, TitleSoft offers INTELLAclose Reconciliation Services. Please contact TitleSoft Technical Support for additional information to include program cost.

NEWSWORTHY



Software Support Services

At TitleSoft, we work diligently and creatively to provide our loyal clients the highest quality technical support services at the lowest possible recurring maintenance cost. Over the years we have all experienced a roller coaster ride of sorts. During the financial crisis we were possibly the only vendor that allowed customers to downsize licensing to preserve resources, which was at best an administrative challenge for our operations. Further, TitleSoft has had only three rather small increases in the year-over-year support services rate since our 2000 launch. At the same time during this period many valuable platform updates were rolled-out while costs and complexities increased well-beyond that level.

Progressively moving the technology bar, and knowing TitleSoft's solutions eliminate traditional third-party technical requirements and costly overhead of other systems, we consistently add new feature richness, and we're hard at work building out the INTELLAclose platform to account for the CFPB's 2015 requirements, the 2014 servicing rate was increased to help cover costs associated with ever-more complex software development and related technical servicing. While no one loves paying more for anything, we sincerely hope our customers' fairly-value the quality of the software product updates and technical services delivered as well as the all-inclusive nature of our software support program.