



# halTrack 1.0

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halTRACK **Web Order Manager**

*halTrack* is a product in the *halFILE* family which provides a Title Company with an Internet presence that is useful to both the Title Company and its customers



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halTRACK **Web Order Manager**

*halTrack* streamlines the order process, helps reduce phone time and data entry, and provides timely information to customers



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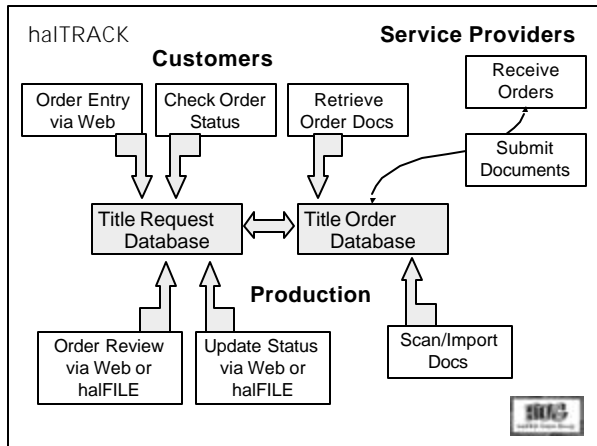
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- ## Customers
- Banks
  - Mortgage Lenders
  - Builders
  - Real Estate agents
  - Remote Title offices
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- ## Title Production
- Title Companies
- ## Service Providers
- Surveyor
  - Appraiser
  - Exterminator
  - Searcher
  - Credit Bureau
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halTRACK

## Order Entry

- Orders are submitted by customers using the Internet
- Automatically posted into a halFILE Title Request database
- The Order Number can be automatically generated and a web link is returned to the customer for checking Order Status
- A follow-up e-mail shows the Order was received with instructions for checking the status and retrieving documents
- An e-mail is sent to a designated e-mail account at the Title Company notifying them that a new order was received



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halTRACK

## Order Entry

When the Order e-mail is received:

- The order entry person then goes into halFILE or e.halFILE to review and finalize the order
- In halFILE, the Word Merge feature can be generate an Order Sheet for the Examiner at this time.



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halTRACK

## Streamlined Data Entry

- Documents for the order are captured by halFILE and indexed by the Order Number in an Order Tracking database
- Lookup feature used to pull data for the order into index fields from a halFILE Title Request database, AIM for Windows or SoftPro's ProForm
- Documents are immediately available to customers and Title Company users alike via Web Order Status checking.



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halTRACK

## Document Capture

### Methods for capturing documents:

- Scan at your office
- Remote FTP Scan
- E-mail
- Fax
- Web form upload



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halTRACK

## Status Checking

From your web site, customer logs in with a user-id and password. The customer can **only** view his or her own orders.

The status of the order is maintained in the Title Request database. A web page lets the user view (1) all outstanding orders or (2) a particular order.



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## Document Retrieval

From your web site, customer logs in with a user-id and password. The customer can **only** view his or her own orders.

Documents for an order are maintained in the Title Order database. A web page lets the user view documents for (1) all outstanding orders or (2) a particular order.



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## halTRACK

### **New Customer Set up**

From a web page new Customers provide information which is posted to a halFILE Customer Database. The order entry person must complete the set up in halFILE and provide information back to the customer telling them that their account is approved and set up.



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## halTRACK

### **Web Page Design**

Attractive Order Entry and Order Status Checking templates are provided with **hal Track**. Part of the installation process includes customization of these templates to include your company logo and information. A link from your company's main web page to these web pages can be set up.



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## halTRACK

### **System Requirements**

- halFile for Windows
- Public Web Site running Microsoft Internet Information Server 4.0 or later



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## halTRACK

### **Optional**

e.halFILE – provides web search of any database field in the Order Tracking and Order Book databases and retrieve documents and images. Also supports web searching of other halFILE databases such as Title Plant.

Crystal Reports Professional – provides the able to print reports of database information from a web page.



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## halTRACK

### **Additional halFILE Features**

- E-mail Notification if Status is updated
- Document Delivery when Status is set to complete
- Word Merge for requesting a Title Search
- HFFlow32 to automatically sync Title Request and Title Order databases
- TWAIN FTP Scanning



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## Augusta Title

[www.AugustaTitle.com](http://www.AugustaTitle.com)

Wendy Murner



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Questions?



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