

# SFFlexSuite® Web

## Reference Documentation



*In order for a user to begin using any of the portal applications powered by SFFlexSuite® Web, the user must create an account by signing up first.*

### Sign Up (for New Users)




Click the 'Sign up' link [Sign up](#) and fill out all required information in the new window (see below).

A screenshot of the 'User Profile' registration form. The form is titled 'SFFlexSuite® Web' and 'User Profile'. It contains several input fields: 'First Name', 'Last Name', 'Company Name', 'Title', 'Phone Number', 'Email Address', 'Password', and 'Retype Password'. Below the fields, there is a checkbox for 'I have read and agree to the terms of the disclaimer.' and two buttons: 'Clear' and 'Submit'. A red note at the bottom states: 'Password must be at least six characters and contain at least one capital letter, one lowercase letter, and one number. All fields are required.' The footer of the page reads '© Software Finesse, LLC, Powered by SFFlexSuite® Web'.

You must also read and agree to the disclaimer terms and press the 'Submit' button after checking the: 'I have read and agree to the terms of the disclaimer' check box.


Once the account is created successfully, you will see the following screen where you need to request access to the group of your choice. (Without being granted access to at least one group, you will not be able to access any of the Apps available in the portal.)

You can see the Apps belonging to a group in the last column on the same row (**above**). You can request the access to a group by pressing the  icon next to the desired group.

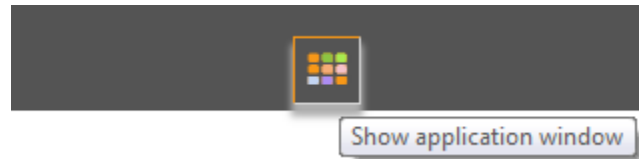
A “Grant Access” or “Rejection” note will be sent to your e-mail within one business day (usually sooner).

### Log In (for Existing Users)

*\*Both, the user name and password are case sensitive*

Type your e-Mail address and password in the appropriate text boxes and press ‘Enter’ or click the login button . In case you have forgotten your password, click the link: [Forgot my password](#), and enter your e-Mail address in the text box. . Press the ‘Submit’ button and you will receive a temporary password via e-Mail. You could later change it in your User Profile App.

## Application Window



After successful log in to the Portal, the first thing you do is click the application window button (**above**) in order to select and access your user profile or any other App that you have been granted access to.




## User Profile



Once you have the Application Window open, select the 'Portal Management' tab at the top (**above**). It will open the 'PORTAL MANAGEMENT' folder containing the 'User Profile' icon. Click the icon in order to open your profile App.

Access Pending	Removal Pending	Access Granted	Add/Remove	Group Name	Apps in Group
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+ - x	DeKalb County Admin	DeKalb County Information
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+ - x	DeKalb County Admin	DeKalb County Marriage Licenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+ - x	DeKalb County Admin	DeKalb County Marriage Licenses

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User Profile App is used to change any of your profile information including user name and password. Keep in mind that you should always have a valid e-Mail address (as your login name) in order to be properly identified and validated, especially in cases of forgotten password. In order to successfully make any changes to your profile, you must type your password and click the . The profile App is also used to request access or removal to/from any groups by clicking the  or the  icons respectively.

## Apps (Applications)

Portal Management

SF Apps

SF CLIENTS

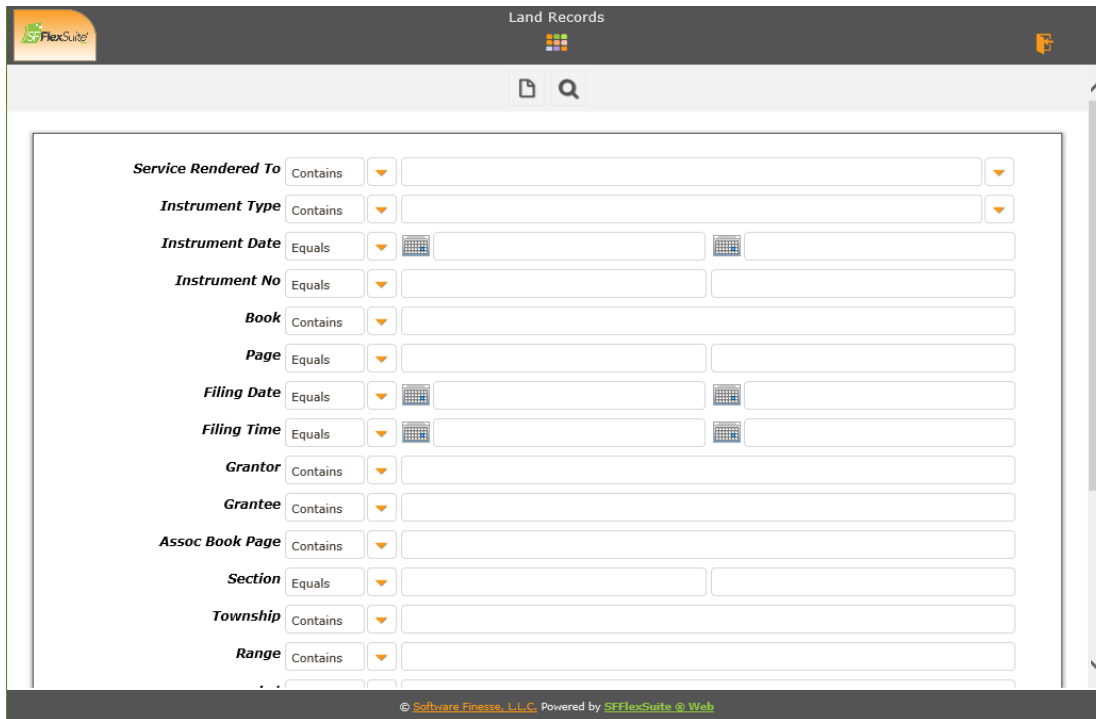
SF Client Portal

SF SALES

SF SUPPORT

Once you have the Application Window open, select the desired application tab at the top (in this case 'SF Apps'). It will open the desired folder containing all available Apps together or grouped by certain criteria for better clarity (In this case, the Apps in the 'SF Apps' folder are organized in three groups: 'SF CLIENTS', 'SF SALES' and 'SF SUPPORT') Click a group name to display the Apps belonging to the group. Click an App icon in order to open and work with it.

## Working with Database and Image Enabled Apps (Applications)



The screenshot displays the search interface for 'Land Records' in SF FlexSuite. The interface features a toolbar at the top with 'CLEAR' and 'SEARCH' buttons. Below the toolbar, the search criteria are organized into a list of fields, each with a search option dropdown and a text input field. The fields and their search options are:

- Service Rendered To: Contains
- Instrument Type: Contains
- Instrument Date: Equals
- Instrument No: Equals
- Book: Contains
- Page: Equals
- Filing Date: Equals
- Filing Time: Equals
- Grantor: Contains
- Grantee: Contains
- Assoc Book Page: Contains
- Section: Equals
- Township: Contains
- Range: Contains

At the bottom of the interface, there is a copyright notice: © Software Finest, L.L.C. Powered by SF FlexSuite @ Web.

All database, including image enabled, Apps have a search screen (**above**) used for searching the Apps databases. The layout is usually:

A toolbar at the top. It contains the 'CLEAR' and 'SEARCH' buttons and in cases of certain user permissions 'ADD NEW' button as well. Under the toolbar the display from left to right is usually:

*Field Name* – A label representing the name of the database field.

*Search Option* – A dropdown box used to create a more flexible search result. The search option dropdown box can vary based on the type of database field it represents. For alphanumerical fields, it is "Starts with; Contains; Ends with". For numerical or date fields, it is "Greater than; Equals; Less than".

*Searchable Value* – A text box, drop down box or a check box that are used to specify the value you are searching for.


Once a search criteria is typed, you can reset the search screen by clicking the 'CLEAR' toolbar button or you can press the 'SEARCH' button in order to see the search result. In case you have the appropriate permissions, you can click the 'ADD NEW' button in order to add a new record in the current App's database.

After successful search the results are displayed in a grid screen (**below**). To return back to the search screen, press the 'SEARCH' from the top toolbar. In order to sort the grid by certain column, click the *header* of the

column one or two times in order to sort the values in Ascending or Descending order. In order to go to the next, previous, last or first page of the grid (in cases the result records exceed the maximum number per page) use the navigation arrows at the bottom of the grid.

Show Details	Filing Date	Instrument Type	Book	Page	Number Pages
Details	2/12/2007	AGREEMENT	214	222	33
Details	2/12/2007	WARRANTY DEED	214	223	2
Details	2/13/2007	FULL DEED RELEASE	214	224	3
Details	2/13/2007	FULL DEED RELEASE	214	225	2
Details	2/13/2007	FULL DEED RELEASE	214	226	1
Details	2/13/2007	FINAL SETTLEMENT	214	227	3
Details	2/14/2007	DEED OF TRUST	214	234	8
Details	2/13/2007	WARRANTY DEED	214	228	2
Details	2/13/2007	DEED OF TRUST	214	229	13
Details	2/14/2007	WARRANTY DEED	214	230	2
Details	2/14/2007	DEED OF TRUST	214	231	10
Details	2/14/2007	WARRANTY DEED	214	232	3
Details	2/14/2007	DEED OF TRUST	214	233	17
Details	2/14/2007	DEED OF TRUST	214	235	11
Details	2/14/2007	REQUEST FOR NOTICE	214	236	3

Records: 1 - 15 of 200 - Pages: 1 | 2 | 3 | 4 | 5 (out of 14) Records per page: 15

In order to view more details and the images/documents for a specific record/row, click the corresponding 'Details' button  in the first column of the grid, and you will see the form view screen (below).

Service Rendered To

Instrument Type

Instrument Date

Instrument No

Grantor/Grantee

DATA

Grantor

Grantee

Legal Description 1

DATA

There are no records available.

Page 1

Page 2

Page 3

Page 4

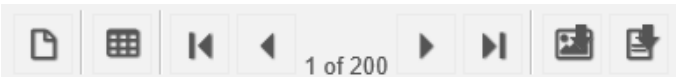


Page 5

Page 6

Page 7

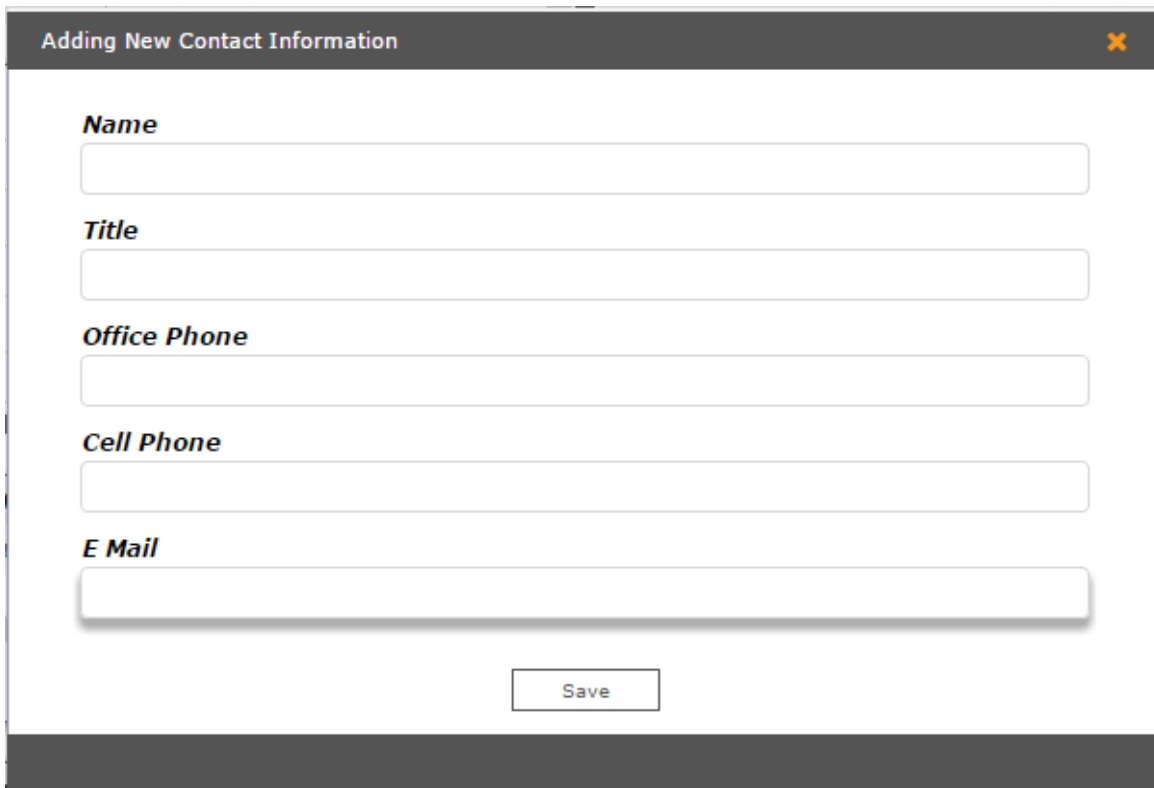
Page 8


Page 9

The top toolbar  allows users to go back to the search screen by pressing the 'SEARCH' button; to delete the currently displayed record by pressing  or to go back to the grid view screen in order to see all the records currently available based on the original search criteria, by pressing 'GRID'. Based on user permissions, the toolbar could also include the  button, which allows batch export of all images, combined in a zip file, for all of the currently searched records.

You can use the database navigation toolbar  (top left panel - **above**) in order to go to the next, previous, first or last records, as well as to save or cancel changes to the current main record.

The bottom left panel (**above**) is used to display, in grid format, the multiple records associated with the main record in the top left panel. You can navigate through the multiple records the same way as described earlier in this section (grid view). In order to delete a multiple record, you click the: **Delete** link next to the record/row you would like to delete. In order to add a new multiple record or to edit an existing one, you press the: **Add New** or **Edit** links (**above**) respectively and fill the necessary information in the following window.



Adding New Contact Information 


**Name**

**Title**




**Office Phone**

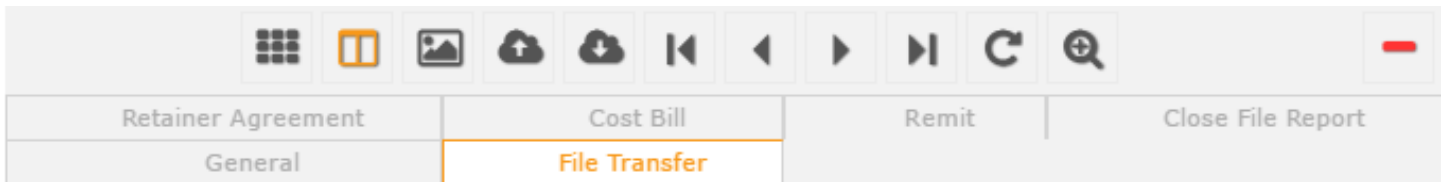
**Cell Phone**

**E Mail**

You can save the record by pressing the 'Save' button or cancel the changes by pressing the  icon in the upper right corner of the window.

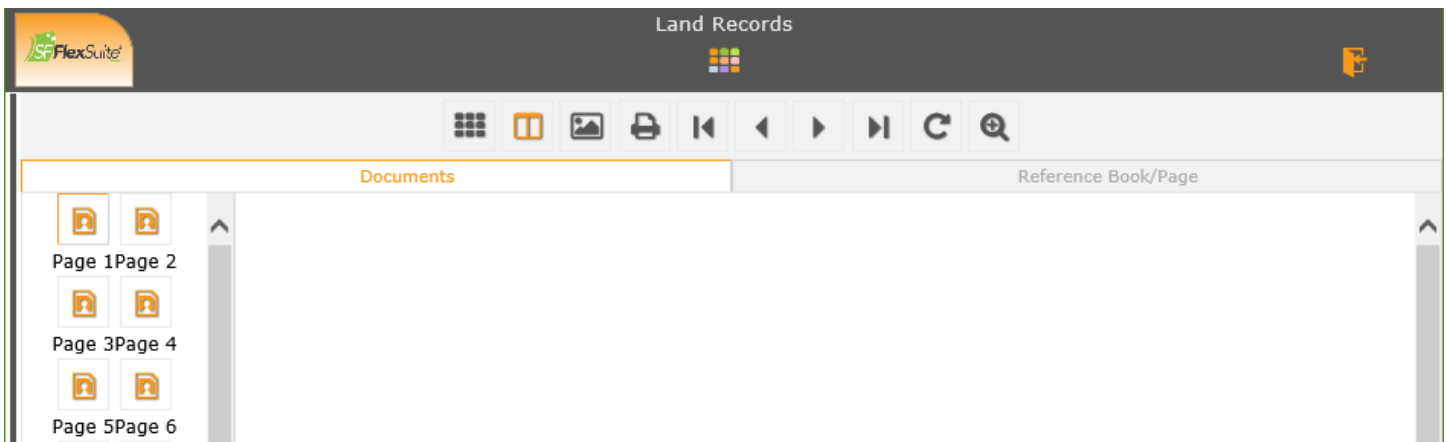
Viewing and working with images and documents associated with the current record is done in the image panel (the right panel). Based on the user and application permissions, the panel toolbar may vary. The




following panel allows for documents to be uploaded , downloaded  or deleted .






Images and Documents could also be organized in folders/tabs, such as 'File Transfer' in the example above.


The following panel shows an example of an App that allows for image view and manipulation.



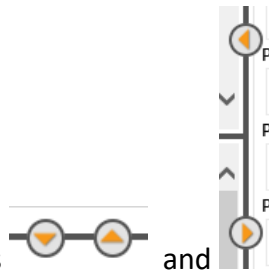
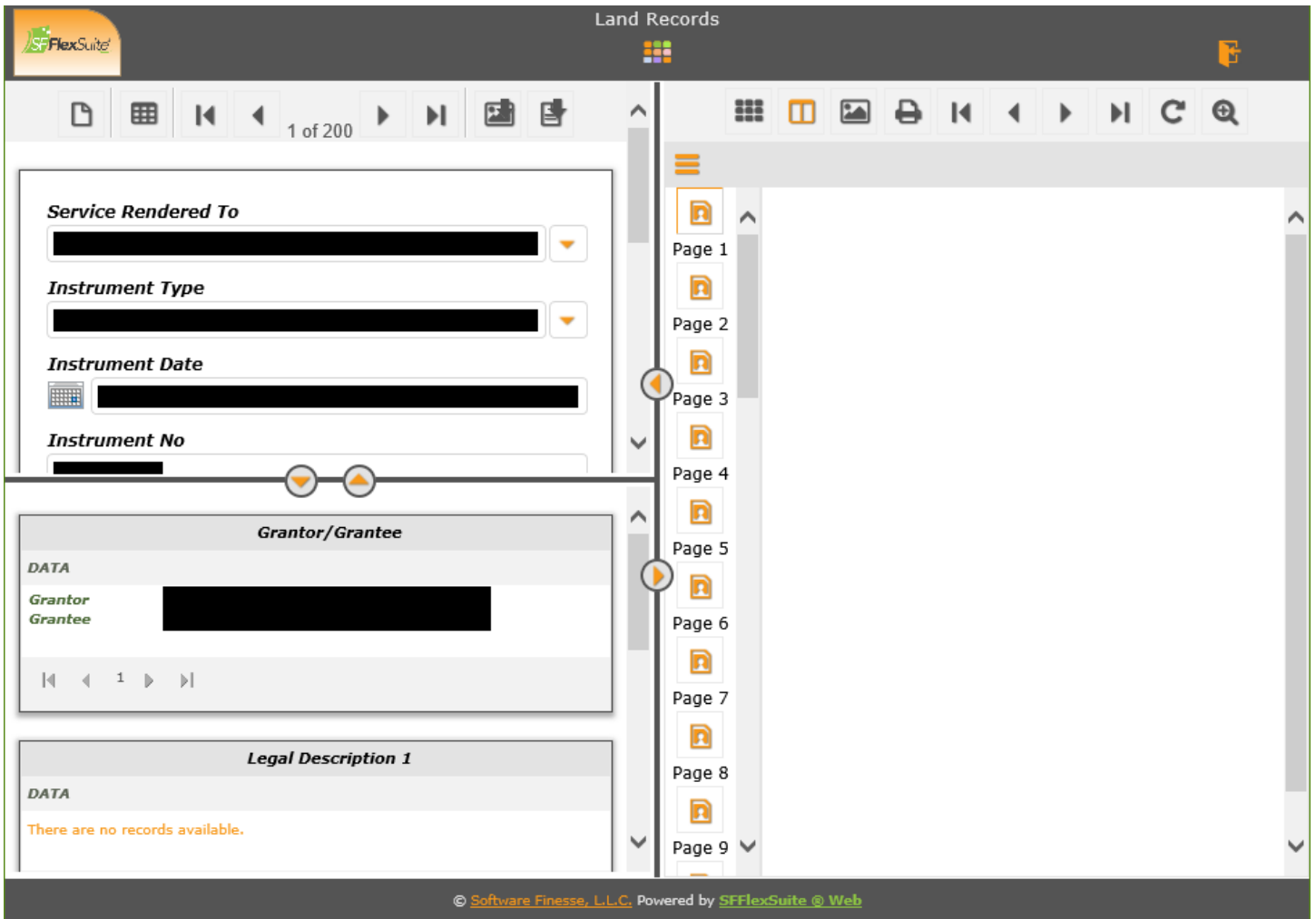
The first three buttons    of the panel toolbar above allow for displaying the thumbnails only; thumbnails and image or image only in the display screen. The selected image could be printed by pressing



the  button; rotated by pressing the  button or zoomed-in by pressing the  button. Navigating

through the individual pages is done by using the navigation toolbar  or by clicking the

corresponding thumbnail icon  Page 1.





The split panel dividers  and  could be helpful in case you would like to free more space on your screen in order to see mostly the main record panel, multiple records panel or image panel.

*For any additional questions, please, contact your Portal administrator or Software Finesse at [support@softwarefinesse.com](mailto:support@softwarefinesse.com)*