



Quick-Start Guide

Customer Support 800-236-6485

Initial Set-up – Easy.

1. Send your search instructions for each type to Monroe@TitleLeader.com.
2. Set-up payment method, so searches can be submitted.
3. Set-up order spreadsheet (or export fields from your platform). See below.

Order Process – Simple.

1. Drag/drop spreadsheet into the order box. Click “Upload.”
2. Select search types - for entire sheet, or per search. Review & edit.
3. Click “Submit.” Done!

Spreadsheet Format – Flexible.

4. File types – Create (or export) an Excel or a CSV file. Both are acceptable.
5. Up to 50 searches per order.
6. Columns and their Headers (names):
 - a. Required – Two. (Some don’t have addresses, just TaxID numbers.)
 - i. State – Can use its name or abbreviation.
 - ii. County – For Virginia, if your spreadsheet contains a Municipality custom column, when you submit your order, that Municipality name will auto-fill into the County field for you.
 - b. Suggested, non-custom – Six.
 - i. Street Number
 - ii. Street Name
 - iii. Unit
 - iv. City
 - v. Zip
 - vi. Notes
 - c. Custom – You may have all you wish.
 - i. All headers that differ from the 8 above are considered custom.
 - ii. All info in custom columns will:
 1. Be part of each search for abstractor assistance.
 2. Auto-fill into each search’s NOTES field: Header:Data.
Ex: “TaxBill#:123..., TaxParcelID:123..., Client:ABC..., Map#:123...”
 3. Be easily found later as NOTES fields are fully searchable on Title Leader’s SMART Dashboard, for your convenience.
7. The order of the columns, from left to right, does not matter.
8. Column headers are not case sensitive. All the following are viewed the same: Street_Number, street number, Street number, street NUMBER.