File Menu: Tool Bar

File / New: You can use this function to start a new title chain while in an existing title chain file or you can start a new title chain when opening up the software.

File / Open: You can use this function to open an existing title chain while in an existing title chain file or you can open an existing title chain when opening up the software.

File / Save: You can use this function to save an existing title chain or save an existing title chain to a new location. CAVEAT: Once you type data into a field and exit that field the data is automatically saved.

File / Close: Option to close a file currently open. CAVEAT: Once you type data into a field and exit that field the data is automatically saved. You can close the file and any changes have that have been made will automatically be saved.

File / Settings / Company Info: Company Name, etc. Any customized narrative. This will print on the flow chart each time you export/print to PDF.

File / Settings / General Settings / Title Chain Heading: Section/T/R, Prospect, etc. etc. Any customized narrative. A file can be edited at any time. This will print on the flow chart each time you export / print to PDF.

File / Settings / General Settings / Sub Heading: Date, Last Instrument examined, etc. Any customized narrative. A file can be edited at any time. This will print on the flow chart each time you export/print to PDF.

File / Settings / General Settings / Default New Instrument: The selected instrument will automatically populate the "Instrument" field on every new instrument inserted. You should set this to the most common instrument examined. You can always change manually if the instrumented assigned here is not the type of instrument examined. File can be edited at any time.

File / Settings / General Settings / Font for Title Chain: You have the option of selecting four font types: Times-Roman, Helvetica, Courier, and Arial. File can be edited at any time.

File / Settings / Default Instrument List: There is a pre-set "Instrument Type Table" with Name, (This is what prints on the PDF flow chart), Shape,

Color and Description fields. You can add, delete, or edit the default settings at setup and these changes will become the default setting for the new file you are setting up and any other future new files. CAVEAT: After a chain has already been setup and you want to edit or add an instrument you will have to use the "Edit Instrument List" located on the "Heading Bar" to the Right of the search field. When you select this option the instrument Table will pop up, then select "Add Instrument", then a "New Instrument Box" will pop up, populate the fields with your election, then choose "Save", the "New Instrument Box" will close, then choose "File" on the heading of the "Instrument Settings Table" that should still be open, and choose "Save or Save and Exit". Be sure to choose one of these option or your change will not be saved. The changes made through "Edit Instrument List" will only be for current file. If you want the change to be permanent and for all future file, you show made the change in the Default Instrument List.

File / Settings / Excel Template: You have the option of pre-selecting and storing a template as to the font, font size, what columns to print, and the order in which you want them to appear. This will avoid having to manipulate the spreadsheet each time you export to an Excel file (spreadsheet).

Export Menu: Tool Bar

Export: If click directly on this menu a PDF flow chart of the title chain will automatically populate.

Export / Drop Down / PDF: If you choose this option a PDF flow chart of the title chain will automatically populate. **CAVEAT:** The check box will automatically populate in the Treeview of the Data Entry Screen (narrative in left column). If you uncheck this box the data associated with this instrument WILL NOT PRINT on the flow chart.

Export / Drop Down / Excel: If you choose this option the data in the title chain will automatically populate into an Excel file. **CAVEAT:** Digital copies in the Attachment Field will not export to the Excel file. See **File / Settings / Excel Template:** to pre-set Excel template.

Instrument Menu: Tool Bar

Instrument / Drop Down / Insert Instrument: When adding a new instrument you should use this option. Move your cursor to the instrument / person in the Treeview of the Data Entry Screen (narrative in left column) that

is transferring the interest and then choose insert. A new blank data field will appear in the right column of the data entry screen. The data will automatically be saved as you type the data into and exit each particular field. A new line field will appear in the Treeview of the Data Entry Screen (narrative in left column) and will progressively populate as you fill the data fields on the right. The data in the "Grantee Name Field" in the instrument you are inserting to will automatically populate into the "Grantor Name Field" of the instrument you are adding. As long as the instrument you are inserting is the last instrument in that leg of the title chain the new instrument will remain in that leg. If you go back to the instrument you just inserted to and add an additional instrument it will begin a new leg. For example: If Instrument A / Owner A sells part of their property to B1. You insert that instrument under A. Then A sells a portion of their property to B2. You insert that instrument under A and it creates a new leg. Then A sells a portion of their property to B3. You insert that instrument under A and it creates a new leg. At this point you should have three legs coming from Instrument A / Owner A.

Instrument / Drop Down / Insert Above: When adding a new instrument inside of an existing leg of the Title Chain you should use this option. For example, if you have a leg with instruments from A to B, then B to C, then a break in the chain of title for this leg, then D to E and then subsequently find the instrument C to D. You can use this function to insert the instrument from C to D into the existing leg. You can go to the instrument D to E and insert the instrument C to D above this instrument and it inserts this instrument in the same leg of the Title Chain. If you inserted a break in the chain of title you can then go back and delete this entry. See Delete function herein.

Instrument / Drop Down / Copy / Selection: When you want to copy an instrument from one leg and insert in or to an existing leg of the Title Chain you should use this option. Use the same protocol as Insert Instrument and Insert Above herein described.

Instrument / Drop Down / Copy / With Children: When you want to copy an instrument and all the instruments inserted to it (Children) from one leg and insert in or to an existing leg of the Title Chain you should use this option. Use the same protocol as Insert Instrument and Insert Above herein described. This is used to copy a whole leg or everything from the instrument selected to everything below it.

Instrument / Drop Down / Paste / As Child: When you copy an instrument and want to paste to an existing leg you follow the same protocol as the "**Instrument / Drop Down / Insert Instrument".** The only difference is in one election you creating an instrument and the other you copying and pasting one.

Instrument / Drop Down / Paste / As Parent: When you copy an instrument and want to paste inside an existing leg you follow the same protocol as the "**Instrument / Drop Down / Insert Above".** The only difference is in one election you creating an instrument and the other you copying and pasting one.

Instrument / Drop Down / Delete: When you want to Delete an instrument and every instrument in the leg below that instrument you use this option. If you right click and choose delete it has the same effect as using Delete in the pull down. All choices will prompt you for confirmation. CAVEATE: Be careful using this option because it deletes the instrument selected, all the instruments below in the same leg of the instrument selected.

Instrument / Drop Down / Delete Single: When you want to Delete the instrument selected you should use this option. This is the safest option to use. All choices will prompt you for confirmation.

Search Menu: Tool Bar

Search: Use this option for general word, name, or number searches. It will highlight in bold print the lines in the Treeview of the Data Entry Screen (narrative in left column) that have like matches.

Input Data Fields:

Transaction #: This is an automatically generated number that is assigned to each instrument loaded into the title chain. This is the number used in the "Link Forward to" field when you are consolidating tracts or linking an interest to another interest. For example suppose A owns eight differ parcels of property in eight different legs. He decides to sell all his parcels to B. You insert the transferring document under one of the legs. Then insert the "Transaction Number" from this entry into the "Link Forward to" field of the other 7 parcels and when the PDF is printed the flow chart will show all eight parcels linked to the one transaction. The flow lines will consolidate to one parcel.

Seq/Doc#: This is a user assigned number (Letters, numbers, symbols or a combination of) that correlates to the document copy whether digital or hard copy.

Bk/Pg: Actual document number assigned after recording.

Instrument: Instrument Type. There is a drop down menu for quick selection of instrument type. You can customize this list to your preference How to customize is discussed in the "File" field.

Shape: This is a shape override field in which you can manually select a polygon type for this instrument and override existing settings. All entries (instrument data) are placed into a polygon (box, circle, oval, triangle) when exported to a PDF file for aesthetical and quick reference purposes. The shapes are assigned to each instrument type at setup. Shape setup is discussed in the "File" field.

Color: This is a color override field in which you can manually select a color type (transparent, blue, red, green, yellow, purple, magenta, orange, brown) for this instrument and override existing settings. The polygon is filled with the color selected. The narrative remains black. The colors are assigned to each instrument type at setup. Color setup is discussed in the "File" field.

Effective Date: Effective date of instrument. If no date is selected the date of entry will automatically populate this field. If you check "N/A" field no date will be printed on the PDF.

Filing Date: Date instrument recorded. If no date is selected the date of entry will automatically populate this field. If you check "N/A" field no date will be printed on the PDF.

Grantor Name: Granting party or parties. This field will automatically be populated by the Grantee of the prior instrument in the chain from which you are inserting this instrument.

Grantor Address: Grantor(s) Address. This information does not appear on the PDF unless the "Print on the Title Chain" box is selected.

Grantee Name: Receiving party or parties.

Grantee Address: Grantee(s) Address. This information does not appear on the PDF unless the "Print on the Title Chain" box is selected.

Current Owner: If this box is checked, the polygon associated with this instrument will be hatched in "Yellow" when printed to a PDF file and will allow quick identification as a current mineral owner. This color does not show up on the Tree View.

Current Lease: If this box is checked, the polygon associated with this instrument "Lease" will be hatched in "Green" when printed to a PDF file and will allow quick identification as a current oil and gas lease associated with this interest. This color does not show up on the Tree View.

Surface Only: If this box is checked, the polygon associated with this instrument "Lease" will be hatched in "Brown" when printed to a PDF file and will allow quick identification as a surface only owner associated with this interest. This color does not show up on the Tree View.

Royalty: Royalty interest if current instrument is an Oil and Gas Lease.

Primary Term: Original term of Lease.

Additional Terms: Additional terms and / or addendum to Lease.

Link Forward to: If you place the "Transaction #" of another instrument in this field, it will link to that instrument. Multiple instruments can be linked by inserting a "," between each transaction number.

Stray Document: If you check this box. The title will flow back to the instrument from which you inserted. When this box is not checked the title will flow away from the instrument which you inserted. I use this function when I have a Quitclaim Deed from a third party to the current owner for curative purposes, etc. The title doesn't advance but stays with the current owner.

Attachments: You can copy and paste document images (JPG or PDF) into this field.

Tract: Assigned identifier (numbers, letters, and characters).

Comments: Any narrative you want to include to assist in chaining ownership. All fields have copy and paste capability.