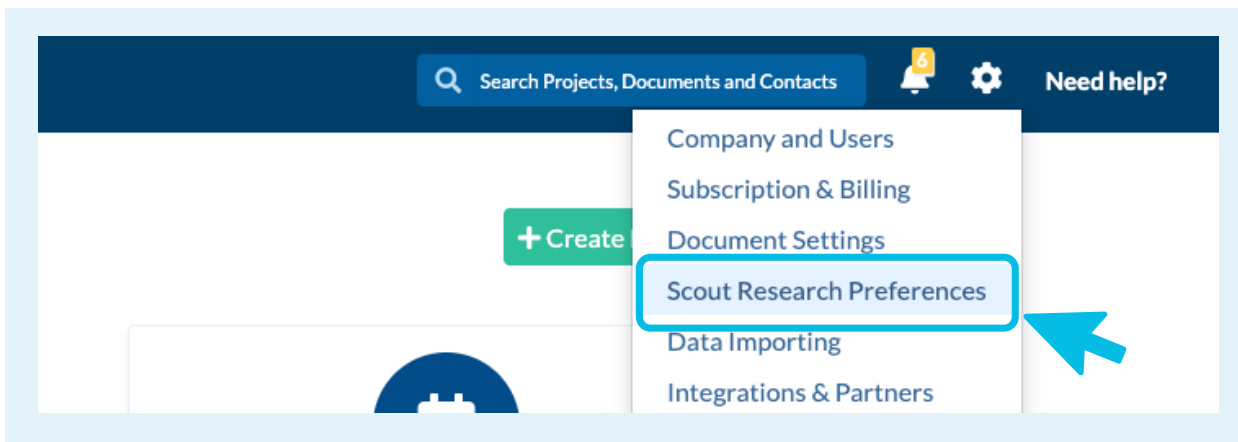# How to Set Your Scout Research Settings
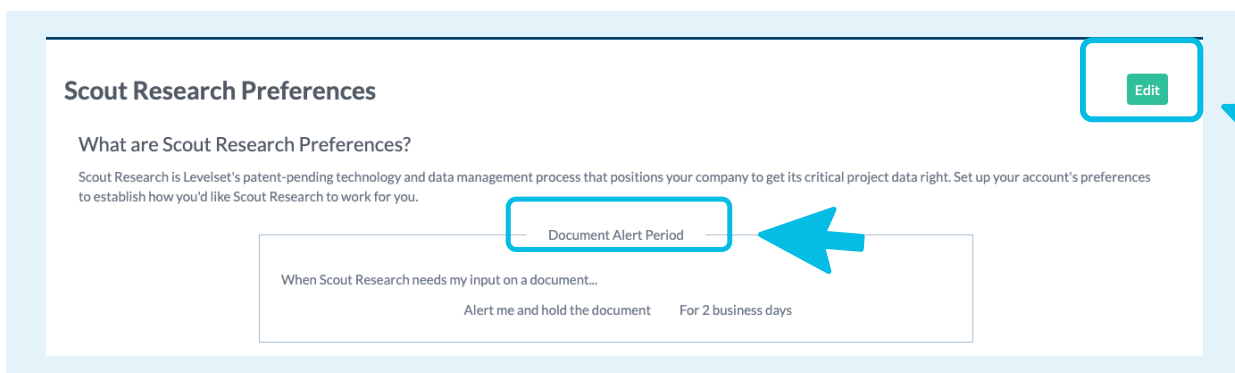
LEVELSET
Payment help is here.

Our Scout Research team helps you identify missing or conflicting property information and project stakeholders. Scout data pulls from nationwide property databases, county assessor records, Levelset's internal database of millions of projects, and anywhere else they can find! If you have a Levelset subscription account, you can customize your Scout Research settings. Read on to learn how to set up these settings in three easy steps.

1 **Step One:** Click on the settings *gear* icon in the top right corner of your dashboard and select *Scout Research Preferences.*
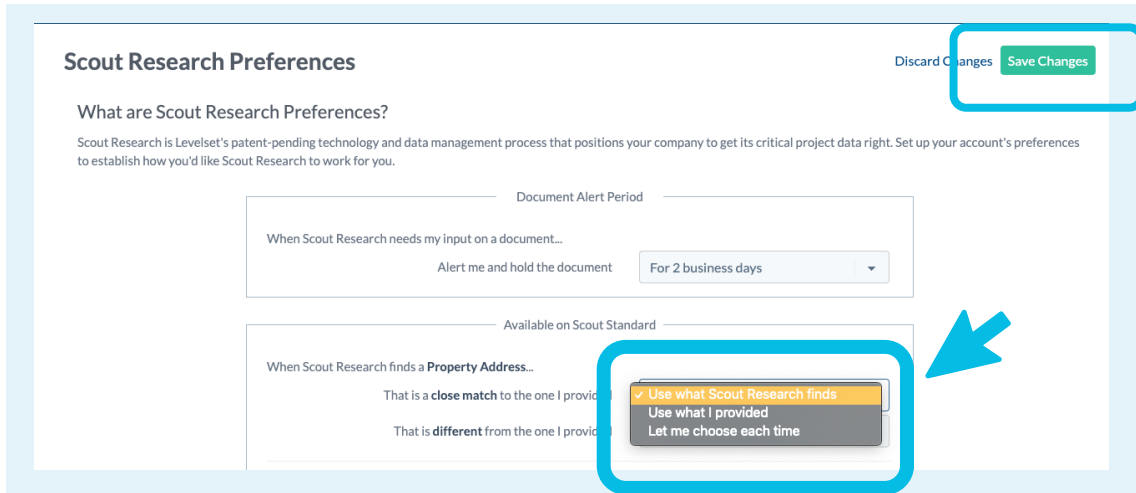

2 **Step Two:** Select *Scout Research Preferences* across the top of the page. Click the green *Edit* button to make changes. First, customize the **"Document Alert Period"** to choose how long you would like Scout Alerts to pause your order while you're allowed time to approve changes. The alerts will be sent to your Levelset account and can be resolved under the **"Scout Research"** tab of the navigation menu .

If your account uses Regions, select a region you would like to edit. You can edit multiple regions before saving your changes. Make the changes you need to any/all of your regions, and save when you're done.

Need help? Call Levelset's five-star Support team at 855-927-2737 or email mail@levelset.com.

3 **Step Three:** For each scenario that might arise on your document order or project, you can select how you would like our Scout team to proceed: **"Use what Scout Research finds," "Use what I provided," "Let me choose each time,"** or in some cases **"Use both".** When you're done, make sure to click the *Save Changes* button!

Scout Research Preferences

Discard Changes   Save Changes

What are Scout Research Preferences?

Scout Research is Levelset's patent-pending technology and data management process that positions your company to get its critical project data right. Set up your account's preferences to establish how you'd like Scout Research to work for you.

Document Alert Period

When Scout Research needs my input on a document...

Alert me and hold the document   For 2 business days

Available on Scout Standard

When Scout Research finds a **Property Address**...

That is a **close match** to the one I provid...

That is **different** from the one I provid...

- ✓ Use what Scout Research finds
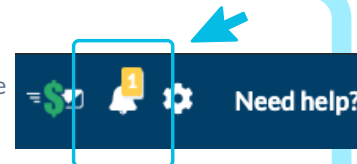- Use what I provided
- Let me choose each time

Pro Tips!

We will only send you alerts when your preference is **"Let me choose each time."** If an alert is not resolved by the end of the Document Alert period, the alert expires and your document will be sent as-is with your original information. The information in the alert will still be available under **"Project Suggestions"** in the **"Scout Research"** tab if you want to update the project information at a later date.

"**close match**": The information we found was slightly different from the information provided by you. For example, there was a slight misspelling in a contact's name or the job site address provided was 123 Main Street vs. 123 N Main Street.

"different": We identified completely different information from what you provided. For example, the property owner provided was Jane Doe at 123 Main Street vs. John Smith at 1 School Street."

What do we mean when we say "we will send you an alert"? Good question! When the Scout team sends you an alert, it means they have suggested an update to your document and need you to login to resolve the alert so your document can be mailed. You will receive an email prompting you to log in. When you log in you will see the pending alert in your in-app notification center.

Need help?

Last updated onJune 8th, 2020

Scout Research gives you peace of mind that you're sending the right documents, with the right info, to the right people, at the right time.