



**TitleFlex**  
by Data Trace

# COMPANY ADMINISTRATION PACKAGES AND COVER PAGES

Rev. 201511

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## Overview

The Company Administration features include managing your company packages, cover pages for farms and packages, logos, sales reps and tracking customer order history. The following topics are covered:

- Company Packages
- Cover Pages
  - Package
  - Farms
- Logos
- Sales Reps
- Exporting Customer Information

## Company Administration

To access the Company Administration functionality, you must be a TitleFlex Administrator for your company. Click your profile menu at the top right hand corner of TitleFlex and select the **COMPANY ADMIN** option in the drop down menu. The **COMPANY INFORMATION** dialog will appear.

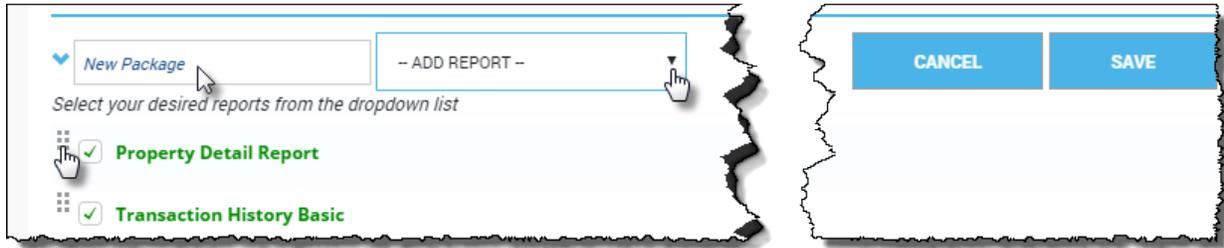


## Company Packages

Company packages are sets of property reports available to any customer. They appear in the Available Reports panel, above Property Reports.

### Creating a new Company Package

In the Company Information dialog, click the Packages tab. Click the **+NEW PACKAGE** button and then add the reports you need from the **ADD REPORT** drop down menu. Name your package.



Click and drag the **handle** up or down to change the order of the reports. **Deselect** the check box to remove the report. Save the package to save the changes.

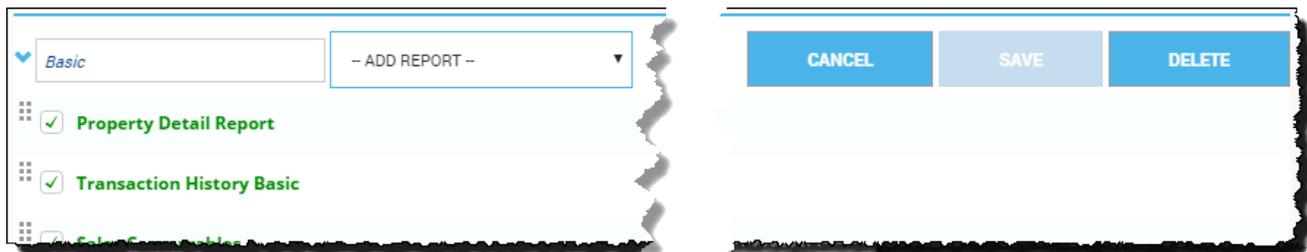


Once saved, your new Company Package will appear in the Company Packages section of the Available Reports panel.

### Modifying or deleting an existing package

Click the ">" to the left of the package name to open the Package.

Add reports, remove reports, or change the order of the reports. Click Save or click the Delete button at the far right to remove the entire package.



# Using Cover Pages for Packages and Farms

A Cover Page is a custom document that you can include with any set of printed, emailed or saved reports or farms. It can include the address of the subject property, property photo, customer information, company representative and other graphics.



**PROPERTY**

962 Junipero Dr  
Costa Mesa, CA 92626



**PREPARED ESPECIALLY FOR**

Customer John Smith

**COURTESY OF**

Pam Etem  
Vice President, Lending Solutions  
pam@etem.com  
714-555-1212

*Thank You For Your Business!*

Main Office:  
12345 Main Street Suite 140  
Huntington Beach CA 92646  
714-555-1234

*Universal Bank – Delivering Results,  
Exceeding Your Expectations!*

Branches throughout California  
Visit our website at, www.UBLLC.com

Reference ID: 1  
Orange County Data as of: 12/29/2016

Robert J Contreras  
Costa Mesa, CA 92626

THE A SITUS ADDRESS OF 962 JUNIPERO DR, COSTA MESA  
TAX ASSESSOR NUMBER OF 141-334-11 AND BEING  
RECORDED IN DOCUMENT NUMBER 2006.778898 DATED

**Active Foreclosure Status**  
There is no foreclosure data available.

Amount / Frequency

Garage #: [Blank]  
Parking Type: Attached Garage/Carport  
Exterior Wall: [Blank]  
Price / Sq. Ft.: \$412

90%  
\$66,627

Owner(s)	Loan Type	Type / Terms
Contreras Robert J	Conventional	Var /

Party 2

Document #
[Blank]

Owner	Loan Type	Type / Terms
Dlugacz Shana	Conventional	Var /

To	Amount
Contreras Robert J	
Dlugacz Shana	
Contreras Robert J	
D Lugacz Shana	\$625,000

Buyer	Amount
D Lugacz Shana	\$625,000
Lyon Christopher S	\$275,000
Keyes Dana K/ Keyes Gregory	\$250,000

Exemption	Amount
Total Taxable Value:	\$625,000
Property Tax:	\$7,212.04

Payment Due	Penalty	Balance Due
12/2016	\$360.60	
10/2017	\$383.60	\$3,606.02

Amount
\$6,559.75
\$327.00
\$216.00
\$109.29

\$ / Sq. Ft.	Days On Market

09/23/2005 Trust Deed/Mortgage \$550,000 World Savings Dlugacz Shana Conventional Var /

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## Creating a Cover Page in MS Word

The process is similar to building a mail merge template in Word (see Word's help file for more information).

1). Download the Example Package Cover page and use the Merge Tags file to copy and paste the tags into the template. Tags inform the platform what to include and where to place it. Use Word's tables to keep the tags aligned with each other.



Start with the example cover page as it demonstrates how to use MS Word tables and insert the tags. Any formatting applied to the tags, such as font, font size, color, bold/italic/underlines, etc. is applied to the tabs when the cover page is generated.

Description:

- 1) Rows 2 – 6: Subject property information.
- 2) Rows 7 – 10: Your company's sales representative. This is from the Sales Rep tab in the Company Information dialog. The Sales Rep assigned to the Customer in the Customer contact card.
- 3) Rows 11 – 22: Your customer's information from the Customer contact card.
- 4) Rows 23 – 24: The date the cover page was generated and the Property Photo from the Subject Property tab.

	A	B	C	D
1	Key	Description		
2	<<StreetAddress>>	StreetAddress		
3	<<City>>	City		
4	<<State>>	State		
5	<<ZIP>>	ZIP		
6	<<APN>>	APN		
7	<<SalesRepFirstName>>	SalesRepFirstName		
8	<<SalesRepLastName>>	SalesRepLastName		
9	<<SalesRepEmail>>	SalesRepEmail		
10	<<SalesRepPhone>>	SalesRepPhone		
11	<<CustomerFirstName>>	CustomerFirstName		
12	<<CustomerLastName>>	CustomerLastName		
13	<<CustomerEmail>>	CustomerEmail		
14	<<CustomerCompany>>	CustomerCompany		
15	<<CustomerOfficePhone>>	CustomerOfficePhone		
16	<<CustomerMobilePhone>>	CustomerMobilePhone		
17	<<CustomerAccount>>	CustomerAccount		
18	<<CustomerAddress1>>	CustomerAddress1		
19	<<CustomerAddress2>>	CustomerAddress2		
20	<<CustomerCity>>	CustomerCity		
21	<<CustomerState>>	CustomerState		
22	<<CustomerZIP>>	CustomerZIP		
23	<<CreatedDate>>	CreatedDate		
24	<<PropertyPhoto>>	Property Photo		

Arrange tags, text and images as desired into a variety of custom cover pages.

Make sure to save the new cover page as a \*.docx format file.

## Uploading and Using Your MS Word Cover Page:

Next, upload your newly created coverage page by selecting New Package Cover (1) from the Package Cover tab in the Company Information dialog box.

The screenshot displays the 'COMPANY INFORMATION' dialog box with the 'PACKAGE COVER' tab selected. The interface includes a dropdown menu for 'SELECT A PACKAGE COVER' with 'New Package cover' selected (1). Below it is a text field for 'COVER NAME' containing 'Team Etem' (2). The 'TEMPLATE TYPE' section has 'MS Word' selected (3). A 'Choose File' button is present, with 'No file chosen' text below it (4). At the bottom are 'DELETE', 'CANCEL', and 'SAVE' buttons (5). On the right, a preview of the cover page is shown (6), featuring a header image, a blue arrow pointing right with address placeholders, a 'PREPARED FOR:' section with customer placeholders, a 'Your Representative:' section with sales rep placeholders and a photo, and a Rodeo Realty logo at the bottom.

Name the cover page (2), select MS Word template type (3) and click Choose File (4). Navigate to your file and click Open in the Open Dialog Box. The “No file chosen” text (4) will change out to the name of your cover page. Click Save (5). A preview of your cover page will display (6).

## Farm Cover Pages

Creating and uploading farm cover pages is the same process as the Package Cover page but includes tags for the farm criteria, the farm name, the number of properties, and the report name (i.e. Five line, one line, etc.).

	A	B	C	D
1	Key	Description		
2	<<SalesRepFirstName>>	SalesRepFirstName		
3	<<SalesRepLastName>>	SalesRepLastName		
4	<<SalesRepEmail>>	SalesRepEmail		
5	<<SalesRepPhone>>	SalesRepPhone		
6	<<CustomerFirstName>>	CustomerFirstName		
7	<<CustomerLastName>>	CustomerLastName		
8	<<CustomerEmail>>	CustomerEmail		
9	<<CustomerCompany>>	CustomerCompany		
10	<<CustomerOfficePhone>>	CustomerOfficePhone		
11	<<CustomerMobilePhone>>	CustomerMobilePhone		
12	<<CustomerAccount>>	CustomerAccount		
13	<<FarmName>>	FarmName		
14	<<NumberOfProperties>>	NumberOfProperties		
15	<<ReportName>>	ReportName		
16	<<CustomerAddress1>>	CustomerAddress1		
17	<<CustomerAddress2>>	CustomerAddress2		
18	<<CustomerCity>>	CustomerCity		
19	<<CustomerState>>	CustomerState		
20	<<CustomerZIP>>	CustomerZIP		
21	<<CreatedDate>>	CreatedDate		
22	<<ParametersAndConstraints>>	ParametersAndConstraints		

Two example cover pages are included in the Farm Cover page tab.



Using the Parameters and Constraints tag will include the filter criteria in your cover page, as shown here.

PARAMETERS	OPERATORS	CONSTRAINTS
Bathrooms	IsBetween	4 - 10
Bedrooms	IsBetween	4 - 8
City	Is	Walnut Creek
County	Is	Contra Costa
Land Use	Is	Single Family Residence / SFR
Living Area (Sq. Ft.)	IsBetween	4000 - 6000
Lot Area	IsBetween	25000 - 75000
State	Is	California

**Criteria:**  
3/13/2017

**PREPARED FOR:**  
Kendall Graveman  
The Athletic's Real Estate Agency

*Thank you for using Rodeo Realty and Funding!*

**Your Representative:**  
Tammy Richards  
trichards@rrealty.com  
714-555-1212



*Thank you for doing business with Rodeo Realty and Funding.  
Making Your Dreams Come True!*



**RODEO REALTY**  
LOCAL EXPERTISE, GLOBAL PRESENCE  
Fine Estates®

## Logo

The name of your company along with your company logo is here.

PACKAGES PACKAGE COVER FARM COVER LOGO SALES REP EXPORT

COMPANY NAME

Pacific Title

LOGO IMAGE

Image supplied CLEAR

Recommended size: 168x48  
PNG and JPG only

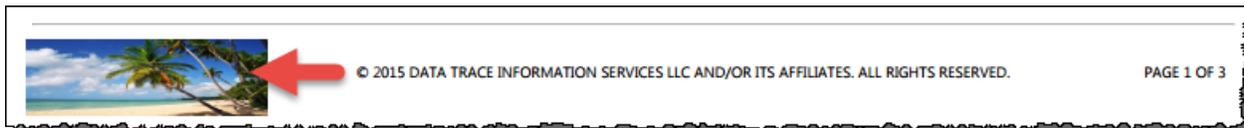
CANCEL SAVE

LOGO IMAGE

Property and multi-line reports will use your logo in the footer section. Please note the recommended size of the logo image for best results.

MULTI PROPERTY ORDER CONFIRMATION

REPORT TYPE	EXPIRATION	PROPERTIES	COVER PAGE	MAP	ACTION
Walking Five Line Report	03/03/2016 09:18AM	69	NONE		VIEW PRINT



## Sales Rep

Create your sales representatives the Sales Rep tab of the Company Admin.

The screenshot shows a web application window titled "COMPANY INFORMATION" with a close button (X) in the top right corner. Below the title bar is a navigation menu with tabs: "PACKAGES", "PACKAGE COVER", "FARM COVER", "LOGO", "SALES REP" (which is selected and highlighted in blue), and "EXPORT".

On the left side of the window is a scrollable list of sales representatives with the following names: ANNA A, GROVER CLEVELAND, KELLY LEARN, ABRAHAM LINCOLN, CHANDRRA M, DAVID ORTIZ, MIKE TROUT, and GEORGE WASHINGTON. At the bottom of this list is a blue button labeled "CREATE SALES REP".

On the right side is a form for adding a new sales rep. It contains the following fields:

- FIRST NAME:** A text input field containing "Jim".
- LAST NAME:** A text input field containing "Smith".
- EMAIL:** A text input field containing "JSMITH@ABCTITLECO.COM".
- PHONE:** A text input field containing "714-555-12212".

At the bottom right of the form area are two blue buttons: "CANCEL" and "SAVE".

Click the Create Sales Rep button at the lower left to open the form. Enter the name, phone and email of the sales rep. Once the fields are completed, the Save button will appear. Click Save to save your sales rep.

By adding a sales rep in the Sales Rep tab, that sales rep's name will appear in the Sales Rep drop-down in the Customer Contact Card. If the Sales Rep tags are used, sales rep's name will also populate the Cover Pages for Farms and Packages.

The screenshot shows a dropdown menu titled "SALES REP" in blue text. The dropdown is open, displaying a list of sales representatives. The name "Mike Trout" is selected and highlighted in a light blue box. To the right of the selected name is a blue "X" icon, which is a standard UI element for closing or removing an item from a dropdown.

## Export

The Export tab in the Company Administration dialog allows you to export your customer information (names, address, contact information, etc.) and their order history.



If you export the Customer Order History, you will be required to enter a date range for the report. This report will help monitor what customers are requesting compared against the revenue brought into