



COMPANY ADMINISTRATION PACKAGES AND COVER PAGES

Rev. 201511

Table of Contents

Overview	3
Company Administration	3
Company Packages	4
Creating a new Company Package	4
Modifying or deleting an existing package	4
Using Cover Pages for Packages and Farms.....	5
Creating a Cover Page in MS Word.....	6
Uploading and Using Your MS Word Cover Page:	7
Farm Cover Pages.....	8
Logo.....	10
Sales Rep	11
Export.....	12

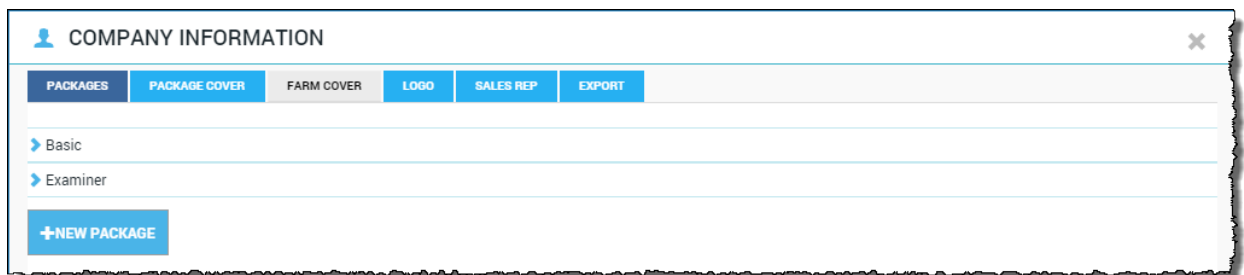
Overview

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

THANK YOU FOR YOUR BUSINESS!


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

COURTESY OF

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

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

Robert J Contreras
Costa Mesa, CA 92626

PARCEL ADDRESS OF 962 JUNIPERO DR, COSTA MESA
TAX ASSESSOR NUMBER OF 141-334-11 AND BEING
RECORDED IN DOCUMENT NUMBER 2005.778898 DATED

Active Foreclosure Status
There is no foreclosure data available.

Amount / Frequency

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

90%
\$66,627

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

Party 2

Document #

Owner	Loan Type	Type / Terms
Clugacz Shana	Conventional	Var /

To	Amount
Contreras Robert J	
Clugacz 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: \$7,000
Total Taxable Value: \$625,000
Property Tax: \$7,212.04

Payment After	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 \$580,000 World Savings

Robert J. Contreras
Vice President, Lending Solutions
pam@etem.com
714-555-1212

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PAGE 1 OF 5

Robert J. Contreras
Vice President, Lending Solutions
pam@etem.com
714-555-1212

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PAGE 2 OF 5

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.

[Download_Merge_Tags_File](#)
[Example Package Cover Page](#)

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.

COMPANY INFORMATION

PACKAGES **PACKAGE COVER** **FARM COVER** **LOGO** **SALES REP** **EXPORT**

SELECT A PACKAGE COVER

New Package cover
Select a Package cover

COVER NAME

Team Etem

TEMPLATE TYPE

☐ Standard ☒ MS Word

Choose File No file chosen

*.docx only

Download_Merge_Tags_File

Example Package Cover Page

HEADER IMAGE

<<StreetAddress>>
<<City>> <<State>> <<ZIP>>

PREPARED FOR:
<<CustomerFirstName>>
<<CustomerLastName>>
<<CustomerCompany>>

Your Representative:
<<SalesRepFirstName>>
<<SalesRepLastName>>
<<SalesRepEmail>>
<<SalesRepPhone>>

DELETE **CANCEL** **SAVE**

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

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.

[Download_Merge_Tags_File](#)

[Example Farm Cover Page](#)

[Sample Cover Neighborhood](#)

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

Criteria:
3/13/2017

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

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



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LOCAL EXPERTISE, GLOBAL PRESENCE

Logo

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

The screenshot shows the 'LOGO' tab selected in a navigation bar. The main area is divided into two sections. The left section, titled 'COMPANY NAME', contains a text input field with 'Pacific Title'. Below this is a 'LOGO IMAGE' section with a placeholder box labeled 'Image supplied', a 'CLEAR' button, and text indicating 'Recommended size: 168x48' and 'PNG and JPG only'. At the bottom of this section are 'CANCEL' and 'SAVE' buttons. The right section, titled 'LOGO IMAGE', displays a preview of a beach scene with palm trees.

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.

The screenshot shows a 'MULTI PROPERTY ORDER CONFIRMATION' page. It features a table with report details and a sidebar with filters. The footer of the page displays the company logo (a beach scene) with a red arrow pointing to it, followed by the copyright notice '© 2015 DATA TRACE INFORMATION SERVICES LLC AND/OR ITS AFFILIATES. ALL RIGHTS RESERVED.' and the page number 'PAGE 1 OF 3'.

REPORT TYPE	EXPIRATION
Walking Five Line Report	03/03/2016 09:18AM

PROPERTIES	COVER PAGE	MAP	ACTION
69	NONE	<input type="checkbox"/>	VIEW PRINT

Sales Rep

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

The screenshot shows a 'COMPANY INFORMATION' dialog box with a close button (X) in the top right corner. The 'SALES REP' tab is selected, highlighted in blue. Other tabs include PACKAGES, PACKAGE COVER, FARM COVER, LOGO, and EXPORT. On the left, a list of existing sales reps is shown: ANNA A, GROVER CLEVELAND, KELLY LEARN, ABRAHAM LINCOLN, CHANDRRA M, DAVID ORTIZ, MIKE TROUT, and GEORGE WASHINGTON. Below this list is a 'CREATE SALES REP' button. The main form area contains fields for: FIRST NAME (with 'Jim' entered), LAST NAME (with 'Smith' entered), EMAIL (with 'JSMITH@ABCTITLECO.COM' entered), and PHONE (with '714-555-12212' entered). 'CANCEL' and 'SAVE' buttons are at the bottom right.

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 'SALES REP' dropdown menu. The text 'Mike Trout' is selected and displayed in a light gray box. To the right of the box is a blue 'X' icon for clearing the selection.

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