CREATING COVER PAGES

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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
- Logo
- Sales Reps
- Exporting Customer Information

Cover Pagesa

You can include a cover page for your client's package or farm. Both cover pages are built and managed the same way but are separate files so you can have customized versions for packages or farms.

The Cover Page uses tables in Microsoft Word to design custom cover documents that can be used with any set of printed, emailed or saved reports, packages or farms.

It can display a variety of times taken from the reports such as:

- The subject property address
- Property photo
- Customer information and logos
- Company representative
- And much more.

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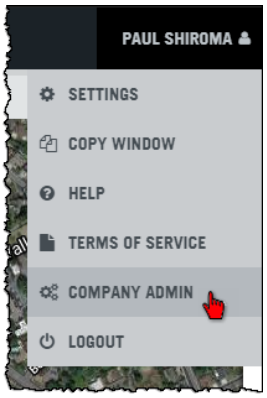
Company Administration

To access the Company Administration functionality, you must be a TitleFlex Administrator for your company.



Click the **PROFILE** menu at the top right hand corner and select the **COMPANY ADMIN** option in the drop down menu.

The **COMPANY INFORMATION** dialog will appear.

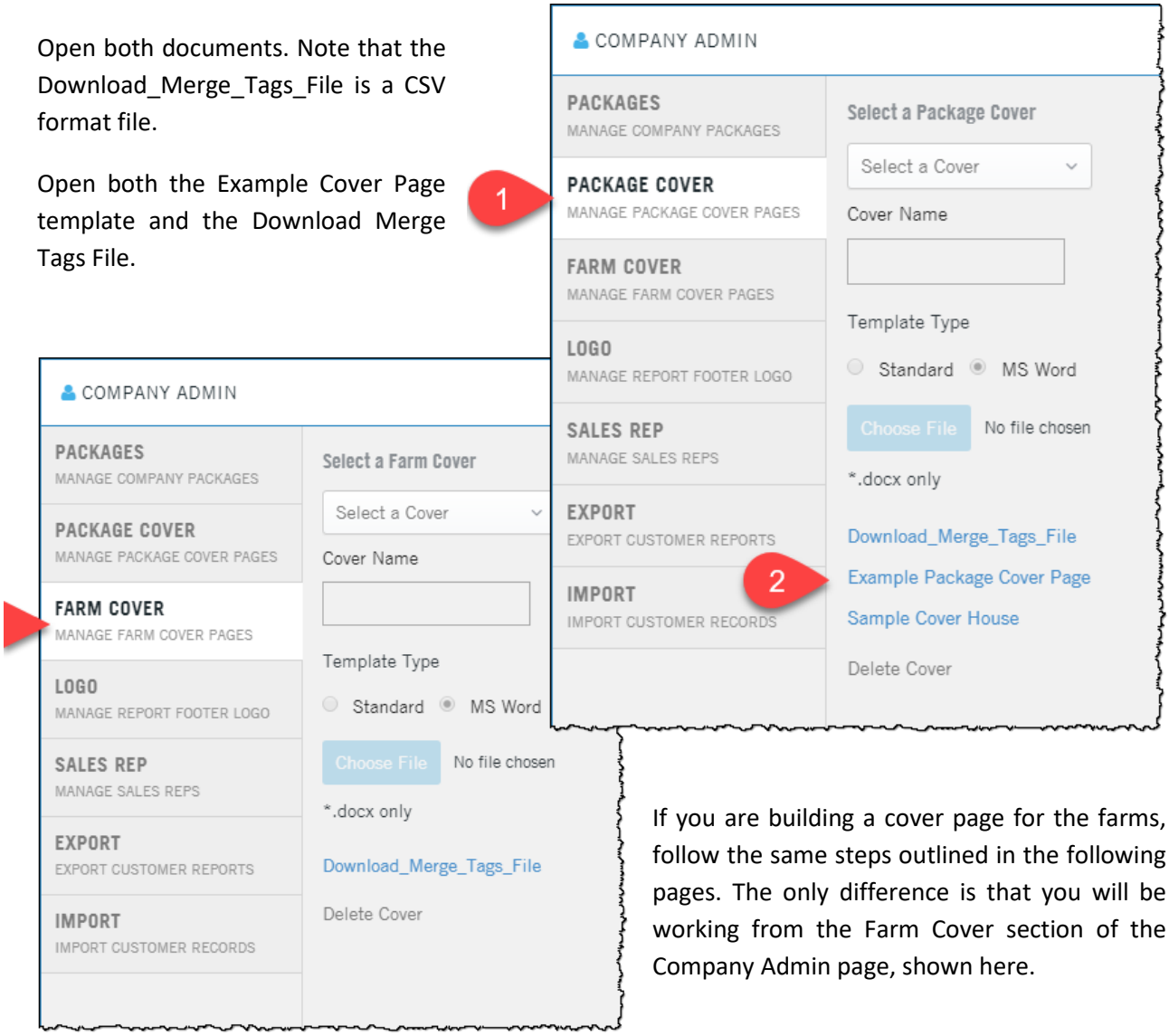
Building the Cover Page

Two pre-built cover page templates are included at the end of this document

In the Company Admin window, select the Package Cover tab on the left (1) and download both the Merge Tags and Example Cover Page files (2).

Open both documents. Note that the Download_Merge_Tags_File is a CSV format file.

Open both the Example Cover Page template and the Download Merge Tags File.



If you are building a cover page for the farms, follow the same steps outlined in the following pages. The only difference is that you will be working from the Farm Cover section of the Company Admin page, shown here.

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BEST PRACTICE: To keep the merge tags aligned, use Word tables. See Word's Help Menu for additional information on using tables.

Remember that you can design your own cover page. The instructions simply use the existing template for demonstration purposes.

Copy and paste the fields from column A (3) of the Tags file into the Word template. These fields are used by the platform to determine what data goes where in your cover page.

3

	A	B
	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

For example, placing the following tags as shown (4) will result in the data being placed as shown at right (5).

4

5

See the templates at the end of this manual for a complete look at example cover pages.

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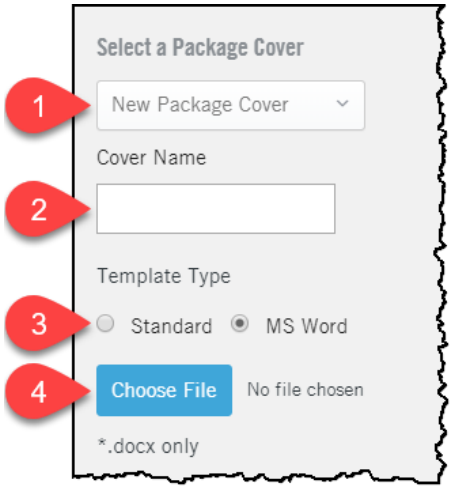
Uploading Your Cover Page

Once you have created your cover page, upload it into the platform.



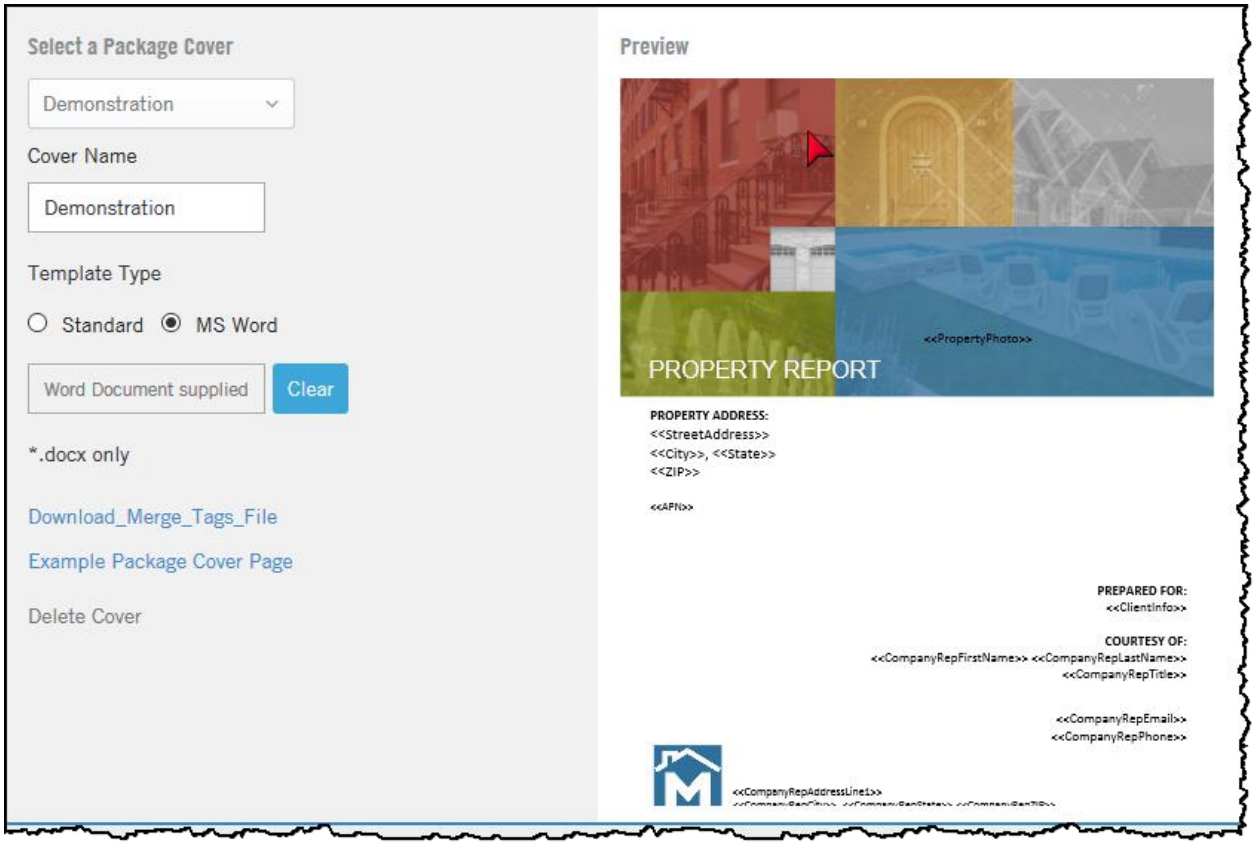
In the Select a Package Cover drop down list, scroll down and select the New Package Cover option (1). It will be the last in the list if other cover pages are loaded.

Name the new cover page (2). If you are using the Word templates, leave the radio button option as MS Word (3).

Click Choose File (4). Navigate to and open your cover page.

Your file will show as follows.

Click the save button at the lower right hand corner. You will briefly receive a green Success! bar at the top of the Company Admin dialog and the Preview section will update to show your newly uploaded cover page.



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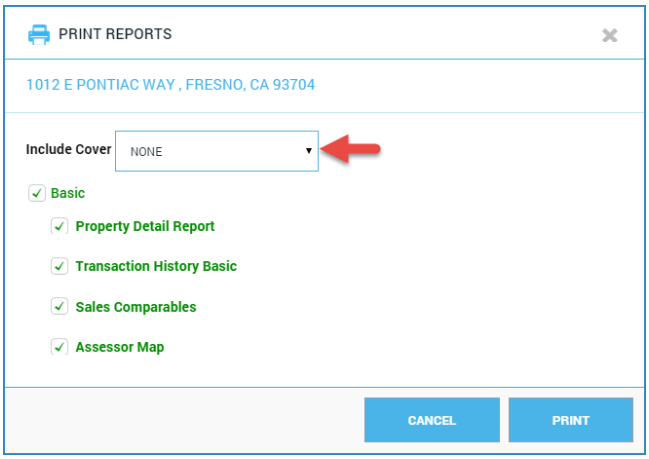
Using Cover Pages

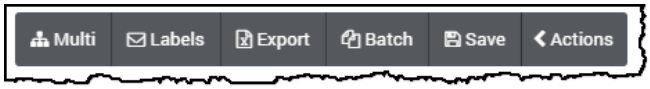
After running a package for a customer, click the Save, Print, or Email link in the action bar.

All three dialog boxes will display the "Include Cover" drop down list, shown at right.

Select the cover page and click Save/Print/Email at the bottom right corner of the dialog box.



Farm cover pages will show up in the Multi-Property exports for exporting lists of properties as "walking" reports.



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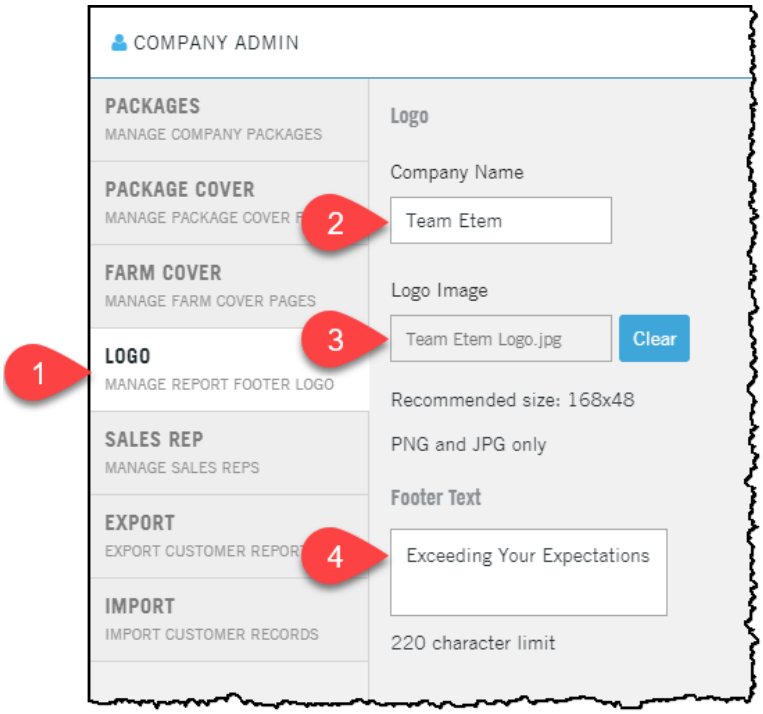
Logo

The name of your company along with your company logo can be entered here (1).

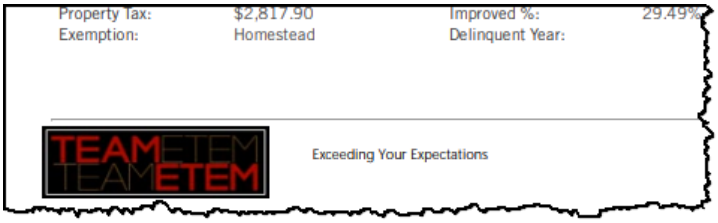
The Company Name (2) is used on the cover pages in the "Provided By" field.

The logo image (3) will be used in the footer section of multi-property reports following your cover page (see below).

Please note the recommended size of the logo image for best results.



Footer text appears at the bottom of reports (4).



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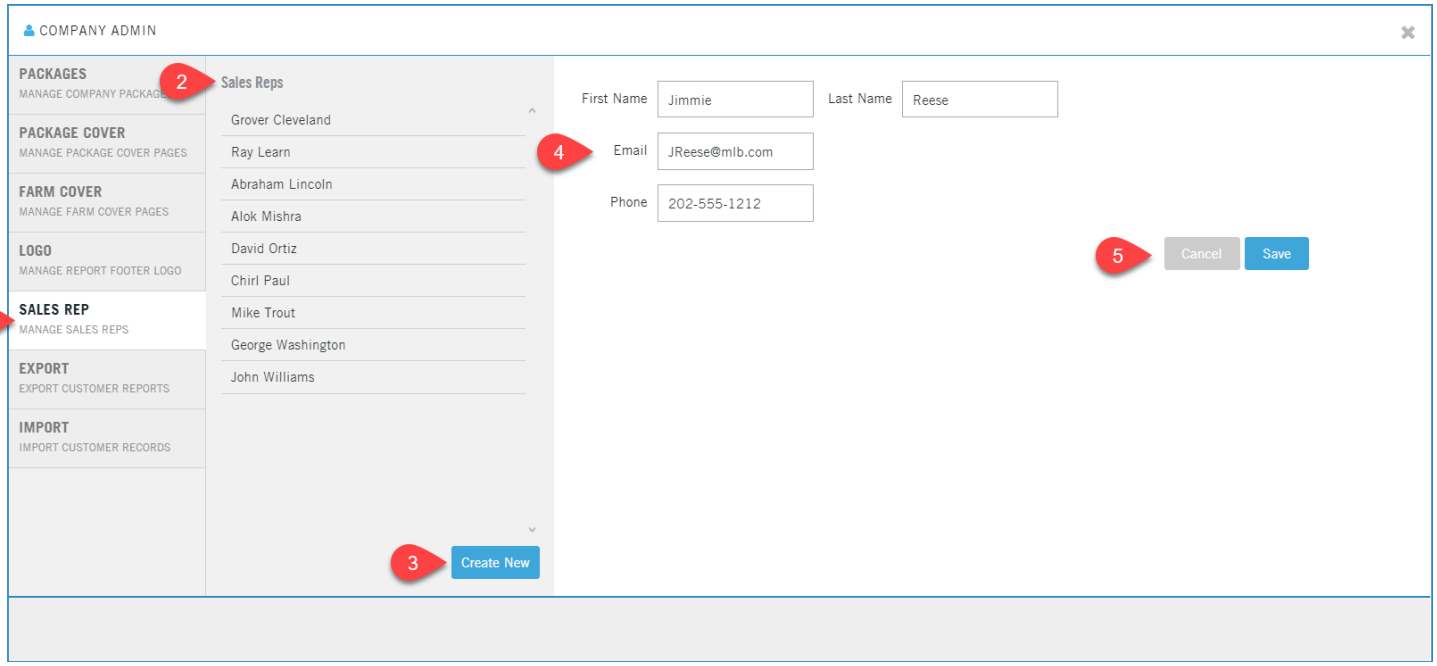
Sales Rep

The sales reps for your Customers are created in the Sales Rep tab of the Company Admin, shown here.



1. Click the Sales Rep tab

2. Existing sales reps will be listed here.

3. Click the Create Sales Rep button to open the form.

4. Enter the name, phone and email of the sales rep.

5. Once the fields are completed, the Save button will appear. Click Save to save your sales rep.

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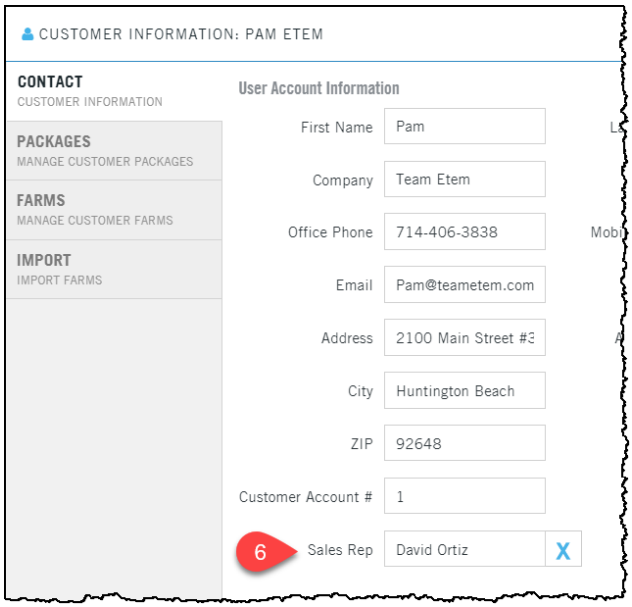
Remember that the Sales Reps are used in the Customer Contact Card (6). By adding a sales rep in the Sales Rep tab, that sales rep's name will appear in the Sales Rep drop-down in the Customer Contact Card.

If you use the Sales Rep tags in the Farm cover pages, the Sales Rep assigned to the customer will also be displayed.



Key	Description
<<StreetAddress>>	StreetAddress
<<City>>	City
<<State>>	State
<<ZIP>>	ZIP
<<APN>>	APN
<<SalesRepFirstName>>	SalesRepFirstName
<<SalesRepLastName>>	SalesRepLastName
<<SalesRepEmail>>	SalesRepEmail
<<SalesRepPhone>>	SalesRepPhone
<<CustomerFirstName>>	CustomerFirstName
<<CustomerLastName>>	CustomerLastName
<<CustomerEmail>>	CustomerEmail
<<CustomerCompany>>	CustomerCompany
<<CustomerOfficePhone>>	CustomerOfficePhone
<<CustomerMobilePhone>>	CustomerMobilePhone
<<CustomerAccount>>	CustomerAccount
<<CustomerAddress1>>	CustomerAddress1
<<CustomerAddress2>>	CustomerAddress2
<<CustomerCity>>	CustomerCity
<<CustomerState>>	CustomerState
<<CustomerZIP>>	CustomerZIP
<<CreatedDate>>	CreatedDate
<<PropertyPhoto>>	Property Photo
<<OwnerName>>	OwnerName
<<LivingArea>>	LivingArea
<<TotalRooms>>	TotalRooms
<<Bedrooms>>	Bedrooms
<<Baths>>	Baths
<<LotArea>>	LotArea
<<Acres>>	Acres
<<YearBuilt>>	YearBuilt
<<LastSaleRecDate>>	LastSaleRecordingDate
<<LastSalePrice>>	SalePrice
<<LandUse>>	LandUse
<<Zoning>>	Zoning

1
2
3
4
5

Tags

Since the Farm and Package Cover pages serve different purposes, some of the tags are applicable ton only one of the templates.

Package Tags

The column labeled "Key" are the fields you will paste into your Word template and are the fields names that TItleFlex will look to populate from the database.

1. Address of the subject property.

2. The title company sales rep

3. The customer to whom this package is being sent.

4. The date the package was run.

5. Additional property detail information. The photo is from the Google Street view.

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Farm Tags:

The Farm key fields include a few extra fields to identify the farm name, number of properties and the report used. Copy and paste the fields listed in the Key column into your Word template

1. Your company's sales rep

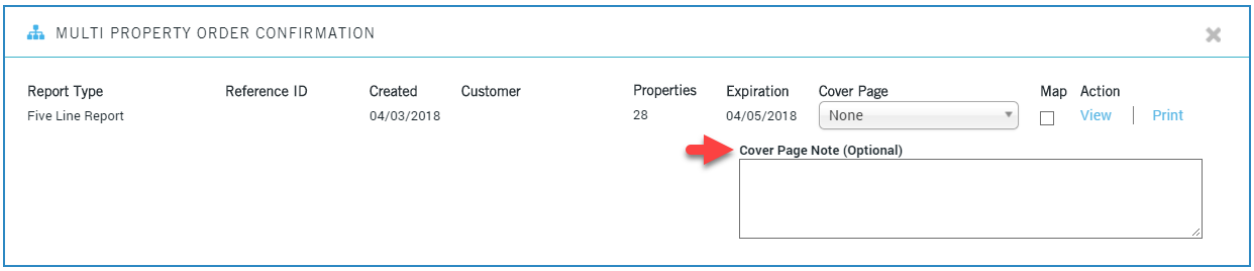
2. Customer information

3. General farm information

4. The date the farm was run, the filter criteria used, and any notes.

The Parameters and Constraints field lists the filters used for the farm (e.g. geography, property characteristics, transactions, etc.). The notes field will show whatever cover page notes you insert when generating the multi-line report.

	Key	Description
1	<<SalesRepFirstName>>	SalesRepFirstName
	<<SalesRepLastName>>	SalesRepLastName
	<<SalesRepEmail>>	SalesRepEmail
	<<SalesRepPhone>>	SalesRepPhone
2	<<CustomerFirstName>>	CustomerFirstName
	<<CustomerLastName>>	CustomerLastName
	<<CustomerEmail>>	CustomerEmail
	<<CustomerCompany>>	CustomerCompany
	<<CustomerOfficePhone>>	CustomerOfficePhone
	<<CustomerMobilePhone>>	CustomerMobilePhone
	<<CustomerAccount>>	CustomerAccount
3	<<FarmName>>	FarmName
	<<NumberofProperties>>	NumberofProperties
	<<ReportName>>	ReportName
2	<<CustomerAddress1>>	CustomerAddress1
	<<CustomerAddress2>>	CustomerAddress2
	<<CustomerCity>>	CustomerCity
	<<CustomerState>>	CustomerState
	<<CustomerZIP>>	CustomerZIP
	<<CreatedDate>>	CreatedDate
4	<<ParametersAndConstraints>>	ParametersAndConstraints
	<<Cover Page Note>>	CoverPageNote



Appendix.

Cover page examples follow.

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<<PropertyPhoto>>

PROPERTY REPORT

PROPERTY ADDRESS:

<<StreetAddress>>

<<City>>, <<State>> <<ZIP>>

<<APN>>

PREPARED FOR:

<<ClientInfo>>

COURTESY OF:

<<CompanyRepFirstName>> <<CompanyRepLastName>>

<<CompanyRepTitle>>

<<CompanyRepEmail>>

<<CompanyRepPhone>>

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<<CompanyRepAddressLine1>>

<<CompanyRepCity>>, <<CompanyRepState>> <<CompanyRepZIP>>

<<PropertyPhoto>>

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

PREPARED FOR:

<<CustomerFirstName>>
<<CustomerLastName>>
<<CustomerCompany>>

Your Representative:

<<SalesRepFirstName>>
<<SalesRepLastName>>

<<SalesRepEmail>>
<<SalesRepPhone>>

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