

Innovations to GO BEYOND
TITLE DATA and AUTOMATION

CREATING COVER PAGES

Rev. 201904

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.

Universal Bank

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!

Universal Bank – Delivering Results, Exceeding Your Expectations!

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

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

TotalView Report
962 Junipero Dr, Costa Mesa, CA
APN: 141-334-11

Property Description: A PARCEL OF LAND CA 92626-5839 C016 CURRENTLY ON THE SAME PROPERTY MORE FULLY DE 9/17/2005 AND RECORDED 1/9/2005

Last Market Sale
Seller: LUNA, CHRISTOPH
Buyer: J. LAGUNA, SHAR
Sale Date: 07/01/2004
Rec. Date: 07/29/2004
Sale Price: \$625,000

Association Information
There is no association data available.

Property Details - Public Record
Land Use: SFR
Zoning: SFR
Year Built / C/L: 1963 / 1963
Style:

Open Liens - Current Owner
Owner 1: Shana Duguez / R
Owner 2: Robert / Contents

Inventory Liens - Current Owner
07/29/2004 through 01/09/2017
Debtor: Shana Duguez / R

Prior Loan History - Current Owner
Borrower 1: Duguez Shana
Borrower 2:

Transfers & Conveyances - Current Owner
Date Document
10/03/2005 Deed Transfer
09/03/2005 Deed Transfer
09/03/2005 Deed Transfer
02/04/2005 Deed Transfer
07/29/2004 Deed Transfer

Ownership History (Full Value)
Date Document
07/29/2004 Deed Transfer
01/18/2000 Deed Transfer
07/27/1998 Deed Transfer

Tax Status
Effective Date: 12/30/2001
Assessor Parcel #: 141-334-11
Tax Year: 2016-17

2016-17 Taxes
Tax Type / Rate
Investment 1: Partial
Investment 2: Partial

Assessment Details
Jurisdiction
Base Tax
Orange Co Sanitation Dist (OSD) Gas
Costa Mesa Sanitary Dist

Listing History
Date Status
There is no listing history data available.

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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.

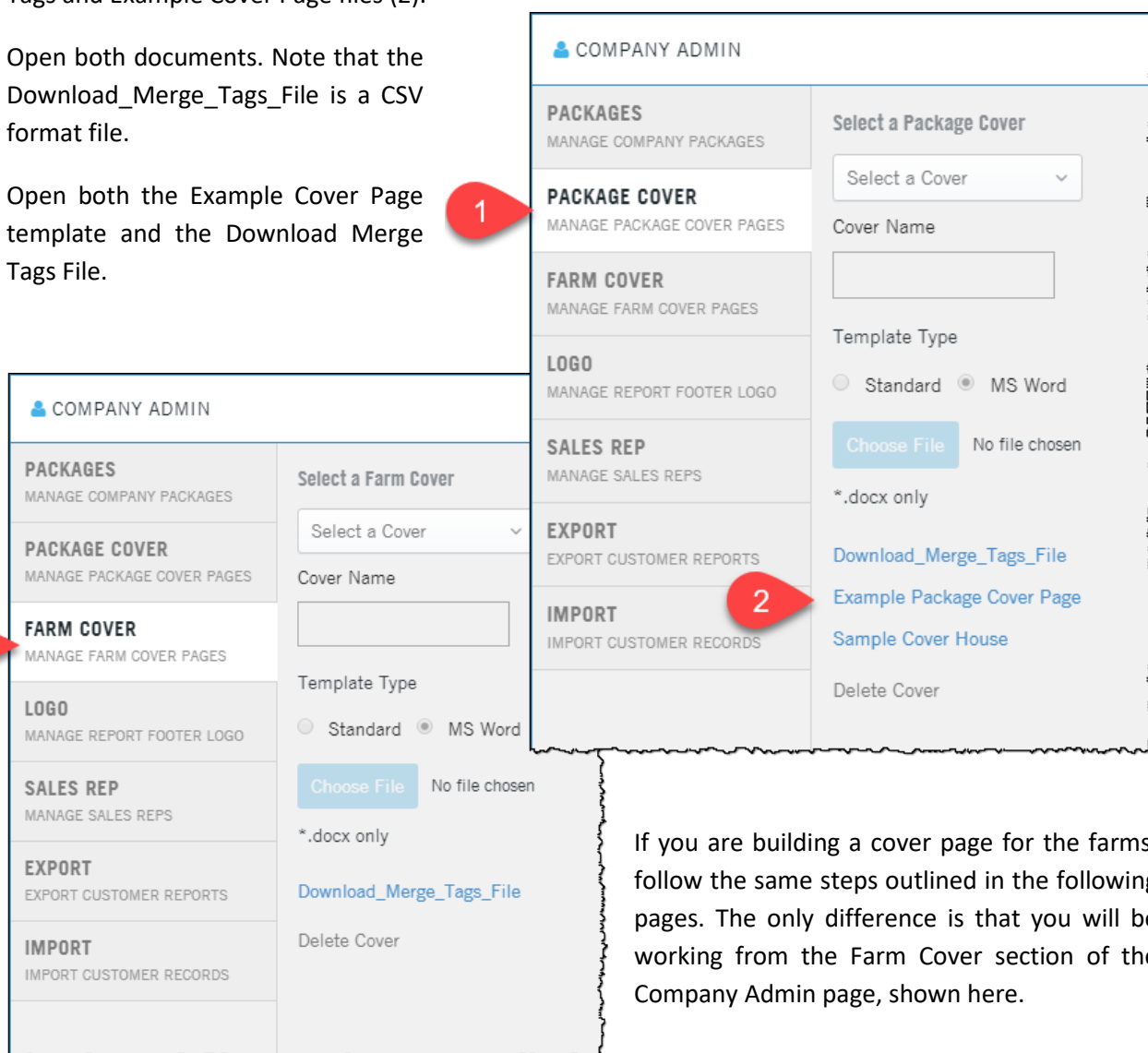
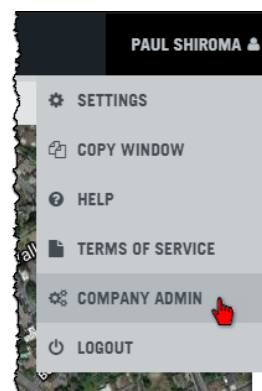
Building the Cover Page

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.

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

PROPERTY REPORT

PROPERTY ADDRESS:
<<StreetAddress>>
<<City>>, <<State>>
<<ZIP>>

<<APN>>

5

PROPERTY REPORT

PROPERTY ADDRESS:
411 W Juniper Ave
Flagstaff, AZ 86001

110-06-002

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

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.

The screenshot shows the 'Select a Package Cover' form. Callout 1 points to the dropdown menu showing 'New Package Cover'. Callout 2 points to the 'Cover Name' text input field. Callout 3 points to the 'MS Word' radio button under 'Template Type'. Callout 4 points to the 'Choose File' button. Below the button, it says 'No file chosen' and '*.docx only'.

The screenshot shows a file upload area with a text box containing 'Package_Example_Cover' and a blue 'Clear' button. Below the text box, it says '*.docx only'.

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.

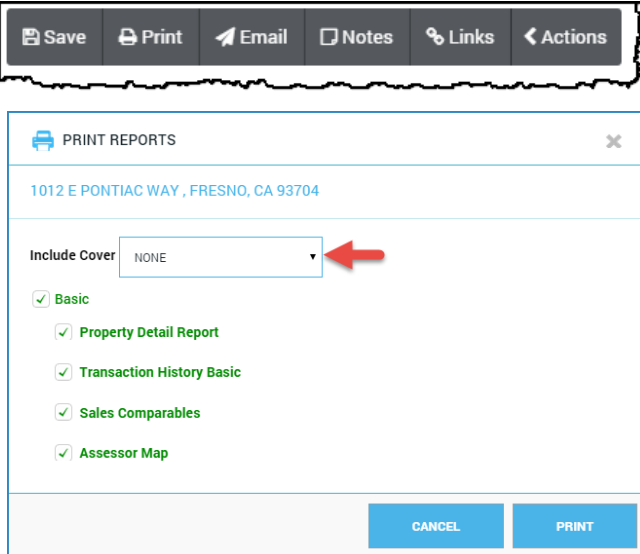
The screenshot shows the 'Select a Package Cover' form on the left and the 'Preview' section on the right. The form has a dropdown menu showing 'Demonstration', a 'Cover Name' text box with 'Demonstration', 'Template Type' with 'MS Word' selected, and a 'Word Document supplied' button with a 'Clear' button. Below the form, it says '*.docx only' and has links for 'Download_Merge_Tags_File', 'Example Package Cover Page', and 'Delete Cover'. The 'Preview' section shows a property report cover page with a collage of images. The text on the cover page includes 'PROPERTY REPORT', 'PROPERTY ADDRESS:', '<<StreetAddress>>', '<<City>>, <<State>>', '<<ZIP>>', '<<API>>', 'PREPARED FOR: <<ClientInfo>>', 'COURTESY OF: <<CompanyRepFirstName>> <<CompanyRepLastName>> <<CompanyRepTitle>>', '<<CompanyRepEmail>>', '<<CompanyRepPhone>>', and a logo with '<<CompanyRepAddressLine1>>' and '<<CompanyRepCity>>, <<CompanyRepState>>, <<CompanyRepZIP>>'.

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.



PRINT REPORTS

1012 E PONTIAC WAY , FRESNO, CA 93704

Include Cover: NONE

☒ Basic

☒ Property Detail Report

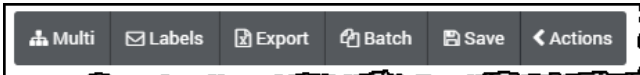
☒ Transaction History Basic

☒ Sales Comparables

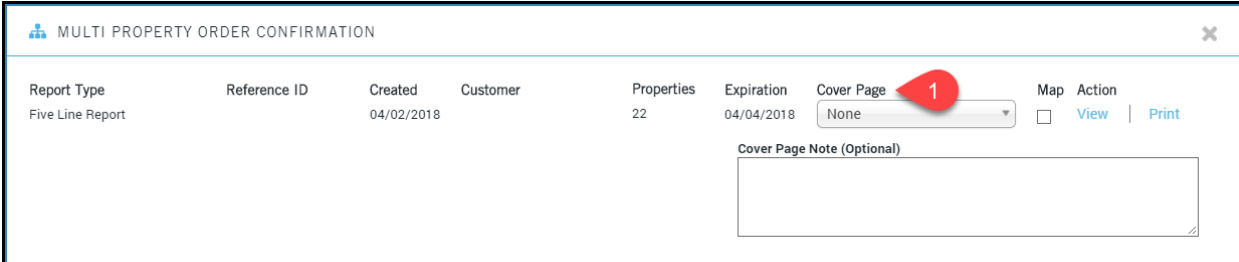
☒ Assessor Map

CANCEL PRINT

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



Multi Labels Export Batch Save Actions



MULTI PROPERTY ORDER CONFIRMATION

Report Type	Reference ID	Created	Customer	Properties	Expiration	Cover Page	Map	Action
Five Line Report		04/02/2018		22	04/04/2018	None	<input type="checkbox"/>	View Print

Cover Page Note (Optional)

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.

The screenshot shows the 'COMPANY ADMIN' interface. On the left is a sidebar menu with items: PACKAGES (MANAGE COMPANY PACKAGES), PACKAGE COVER (MANAGE PACKAGE COVER PAGES), FARM COVER (MANAGE FARM COVER PAGES), LOGO (MANAGE REPORT FOOTER LOGO), SALES REP (MANAGE SALES REPS), EXPORT (EXPORT CUSTOMER REPORTS), and IMPORT (IMPORT CUSTOMER RECORDS). The 'LOGO' item is highlighted with a red callout '1'. The main content area is titled 'Logo' and contains: 'Company Name' with a text input field containing 'Team Etem' (callout '2'); 'Logo Image' with a text input field containing 'Team Etem Logo.jpg' and a 'Clear' button (callout '3'); 'Recommended size: 168x48' and 'PNG and JPG only'; and 'Footer Text' with a text input field containing 'Exceeding Your Expectations' (callout '4') and a note '220 character limit'.

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

The screenshot shows the footer of a report. It contains property tax information: 'Property tax: \$2,817.90' and 'Exemption: Homestead'. To the right, it shows 'Improved %: 29.49%' and 'Delinquent Year:'. Below this information is a logo for 'TEAM ETEM' and the footer text 'Exceeding Your Expectations'.

Sales Rep

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

COMPANY ADMIN

1 SALES REP
MANAGE SALES REPS

2 Sales Reps

Grover Cleveland

Ray Learn

Abraham Lincoln

Alok Mishra

David Ortiz

Chirl Paul

Mike Trout

George Washington

John Williams

3 Create New

First Name Jimmie Last Name Reese

4 Email JReese@mlb.com

Phone 202-555-1212

5 Cancel Save

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.

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
<<CreateDate>>	CreateDate
<<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

Tags

Since the Farm and Package Cover pages serve different purposes, some of the tags are applicable to 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.

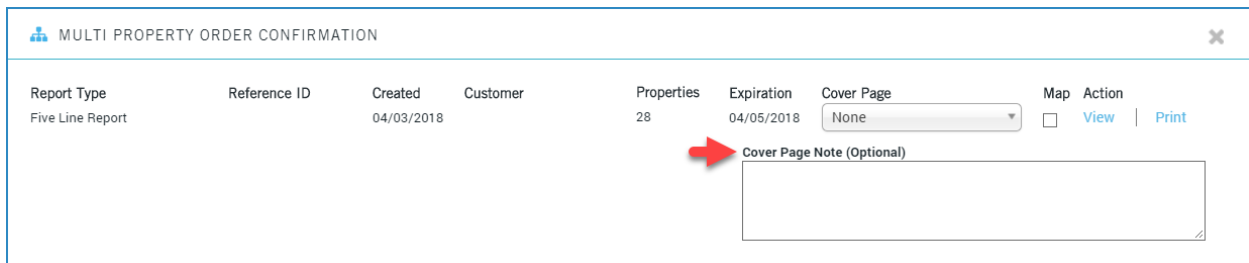
Farm Tags:

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
<<SalesRepFirstName>>	SalesRepFirstName
<<SalesRepLastName>>	SalesRepLastName
<<SalesRepEmail>>	SalesRepEmail
<<SalesRepPhone>>	SalesRepPhone
<<CustomerFirstName>>	CustomerFirstName
<<CustomerLastName>>	CustomerLastName
<<CustomerEmail>>	CustomerEmail
<<CustomerCompany>>	CustomerCompany
<<CustomerOfficePhone>>	CustomerOfficePhone
<<CustomerMobilePhone>>	CustomerMobilePhone
<<CustomerAccount>>	CustomerAccount
<<FarmName>>	FarmName
<<NumberOfProperties>>	NumberOfProperties
<<ReportName>>	ReportName
<<CustomerAddress1>>	CustomerAddress1
<<CustomerAddress2>>	CustomerAddress2
<<CustomerCity>>	CustomerCity
<<CustomerState>>	CustomerState
<<CustomerZIP>>	CustomerZIP
<<CreatedDate>>	CreatedDate
<<ParametersAndConstraints>>	ParametersAndConstraints
<<Cover Page Note>>	CoverPageNote



The image shows a screenshot of a web application window titled "MULTI PROPERTY ORDER CONFIRMATION". The window contains a table with the following columns: Report Type, Reference ID, Created, Customer, Properties, Expiration, Cover Page, Map, and Action. The data row shows: Five Line Report, (blank), 04/03/2018, (blank), 28, 04/05/2018, None, (blank), and View | Print. Below the table, there is a section for "Cover Page Note (Optional)" with a text area for input. A red arrow points to the "Cover Page Note (Optional)" label.

Report Type	Reference ID	Created	Customer	Properties	Expiration	Cover Page	Map	Action
Five Line Report		04/03/2018		28	04/05/2018	None	<input type="checkbox"/>	View Print

Cover Page Note (Optional)

Appendix.

Cover page examples follow.



<<APN>>

<<CompanyRepPhone>>

<<PropertyPhoto>>

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

PREPARED FOR:

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

Your Representative:

<<SalesRepFirstName>>
<<SalesRepLastName>>

<<SalesRepEmail>>
<<SalesRepPhone>>



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