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
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    - Package
    - Farms
- Logo
- Sales Reps
- Exporting Customer Information

Company Administration

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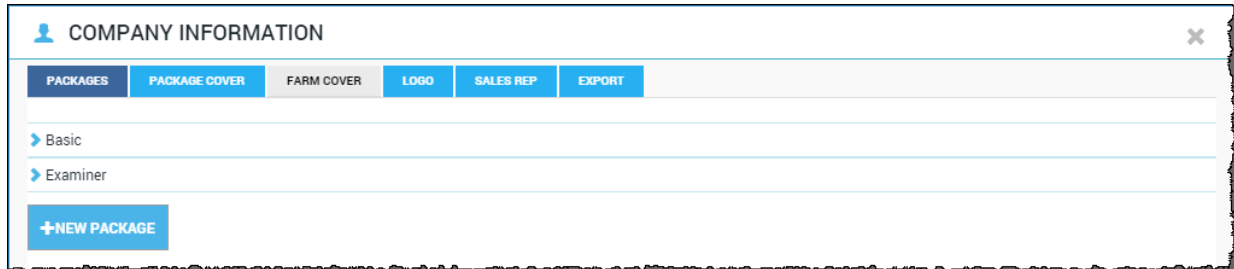
Company Packages

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

Click the **+NEW PACKAGE** button and then add the reports you need from the ADD REPORT drop down menu. Name your package as well.
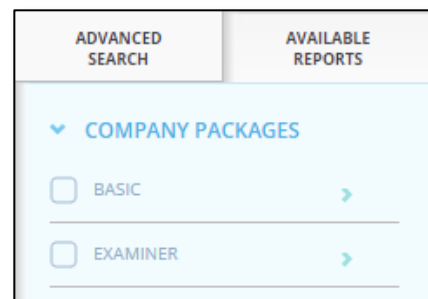

Click and drag the **handle** to change the order of the reports.

Deselect the check box to remove the report. The report will be removed when you save the package.

Click Save when done. You can always modify them later as well.

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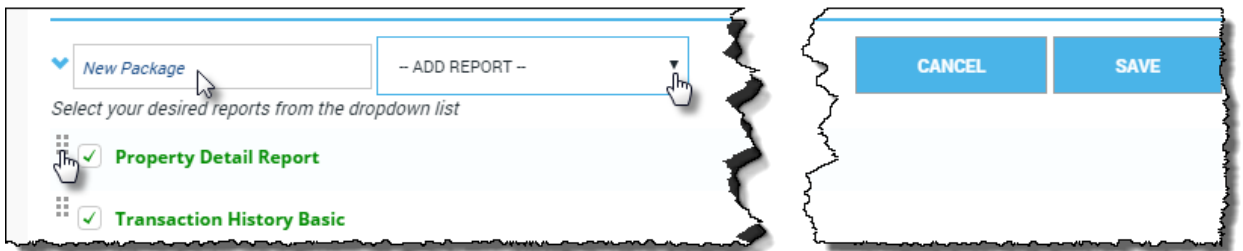
Deleting an existing package

Click the ">" to the left of the package name to open the Package and click the Delete button at the far right.


Modifying an existing package

Open the package by clicking on the ">". You can add reports, remove reports, or change the order of the reports. Click Save when you're done.

Using Cover Pages for Packages and Farms

Cover pages for your packages and farms can be created for use by your client services team when they send out materials to your customers.

Before setting up cover pages, let's look at the elements of a Package Cover Page so we can better understand where the elements are sourced.
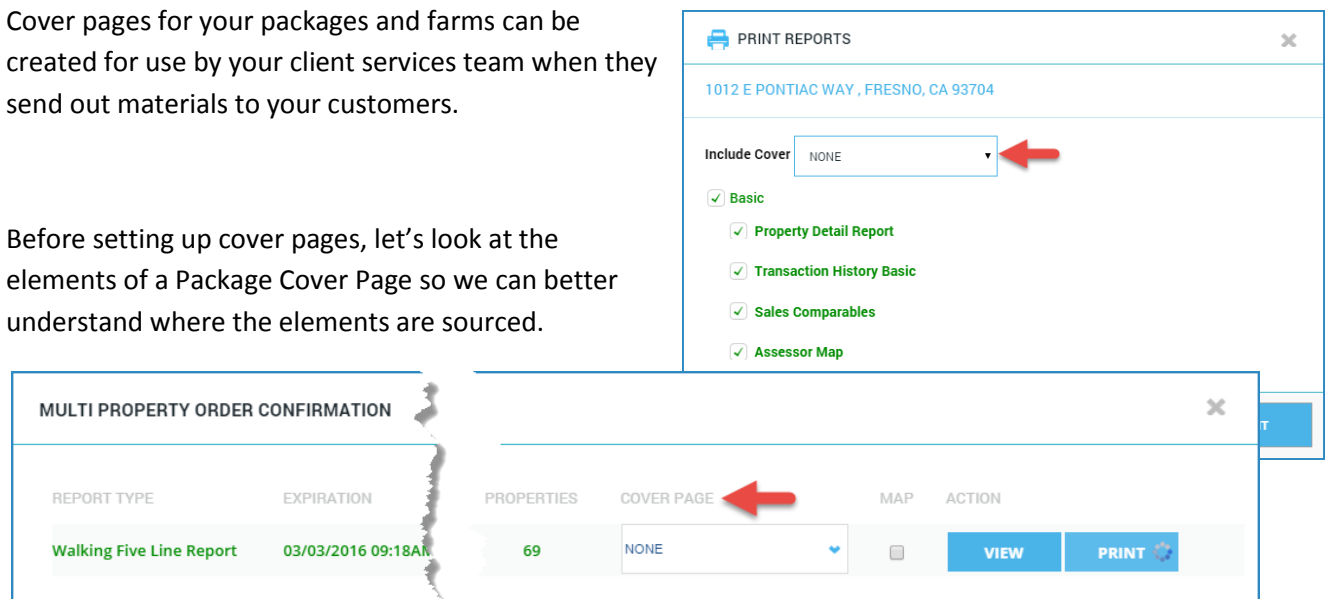
Elements of a Basic Package Cover Page

1 & 2): Header and footer images from the Package Cover page tabs in the Company Administration dialog.

3 & 4): The subject property image and address from the Subject Property Tab

5): This is the name of your company as entered in the Logo tab of the Company Administration dialog.

6): This is the sales rep as added in the Customer Contact Card.

Creating a Basic Package Cover Page

(1) Select an existing cover page from the list to edit an existing cover page, or select New Package Cover to create a new one.

(2) Enter the name of the cover page if new or changing the name.

(3) Select the template type – Standard or MS Word. See the following section for MS Word options.

(4 & 5) Add header and/or footer images. Please note the recommended size of the images. The images will appear on the right hand side of the dialog box.

(6). In lieu of a footer image, you may add footer text. A footer image will override any text entered here.

(7) Click Save when finished.

You can also click Preview to see how your cover page is turning out. If you swap out the header or footer images, click Save each time before clicking Preview so the images save.

Elements of a Basic Farm Cover Page

1): Header images from the Farm Cover page tabs in the Company Administration dialog.

2): This is the name of your company as entered in the Logo tab of the Company Administration dialog.

3): This is the sales rep as added in the Customer Contact Card.

4 - 6) The type of farm report, number of properties, name of report and the filters used in the farm.

HEADER IMAGE

Choose File   No file chosen

LOGO

Provided by **Pacific Title**   2
Courtesy of **Mike Trout**
(P) 949949949 (E) MVP@angels.com   3

SALES REP

Mike Trout

Five Line Report
49 PROPERTIES   4
Saginaw and Pontiac

COUNTY DATA AS OF 02/23/2016

PARAMETERS   5

CONSTRAINTS   6

Geometric Search	Freehand / Polygon
Include Properties Without Dates	No
Total Number of Bedrooms	3 - 4

A legal agreement that conveys the conditional right of ownership on an asset or property by its owner (the mortgagor) to a lender (the mortgagee) as security for a loan. The lender's security interest is recorded in the register of title documents to make it public information, and is voided when the loan is repaid in full. Virtually any legally owned property can be mortgaged, although real property (land and buildings) are the most common. When personal property (appliances, cars, jewelry, 74

Creating a Basic Farm Cover Page

(1) Select an existing cover page from the list to edit an existing cover page, or select New Package Cover to create a new one.

(2) Enter the name of the cover page if new or changing the name.

(3) Select the template type – Standard or MS Word. See the following section for MS Word options.

(4 & 5) Add header and/or footer images. Please note the recommended size of the images. The images will appear on the right hand side of the dialog box.

(6). In lieu of a footer image, you may add footer text. A footer image will override any text entered here.

(7) Click Save when finished.

You can also click Preview to see how your cover page is turning out. If you swap out the header or footer images click Save each time before clicking Preview so the images save.

Logo

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

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

The logo image will be used in the footer section of multi-property reports following your cover page. Please note the recommended size of the logo image for best results.
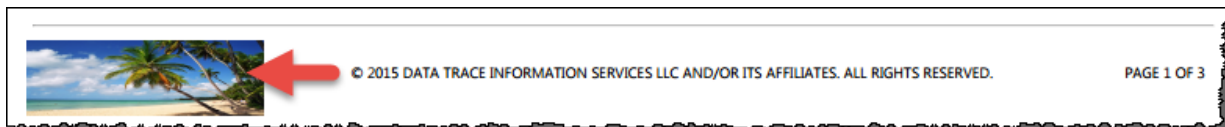
Sales Rep

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

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.

Remember that the Sales Reps are used in the Customer Contact Card, shown below. 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. The sales rep's name will also populate the Cover Pages for Farms and Packages.

Customer Contact Card at left

Farm Cover Page at right

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 is provided to help you to monitor what customers are requesting of your team and can then be compared against the revenue they bring into to your company.

Creating a MS Word Cover Page:

Microsoft Word's ability to format documents is leveraged for this feature.

Before We Begin:

You should be familiar with using tables as well as alignment options in Word as this will allow you to quickly format a cover page and upload it back into TItleFlex. See Microsoft Word's Help menu for more information.

Overview:

You can create your own templates in Word for the platform to use as a cover page or use one of the pre-formatted samples to help you get started. The setup is basically the same for either Farm or Package Cover pages.

(1 & 2) Select New Package Cover and enter a name.

(3) Select MS Word in the Template Type option.

(4) Download the merge tags file and save it to your desktop so you can copy and paste the field names into the cover page.

The merge tags file will contain the fields that TitleFlex will populate for you from the customer, your sales reps, the subject parcel address or the farm parameters.

(5) These are optional pre-formatted Word documents to help you get started. For this guide, we will be using the Sample Cover House.docx file; download this file to your desktop as well.

After you see how this is built, it will be very easy for you to simply use a blank Word document and create your own cover page templates.

Once the Merge Tags File has downloaded, open it in Excel so you can see the tags.

The steps documented will work for either Package or Farm templates.

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

Key	Description	Note
<<StreetAddress>>	StreetAddress	
<<City>>	City	
<<State>>	State	Subject Parcel
<<ZIP>>	ZIP	
<<APN>>	APN	
<<SalesRepFirstName>>	SalesRepFirstName	
<<SalesRepLastName>>	SalesRepLastName	Title Company Sales Rep
<<SalesRepEmail>>	SalesRepEmail	
<<SalesRepPhone>>	SalesRepPhone	
<<CustomerFirstName>>	CustomerFirstName	
<<CustomerLastName>>	CustomerLastName	
<<CustomerEmail>>	CustomerEmail	
<<CustomerCompany>>	CustomerCompany	
<<CustomerOfficePhone>>	CustomerOfficePhone	
<<CustomerMobilePhone>>	CustomerMobilePhone	Your Customer's Contact Information
<<CustomerAccount>>	CustomerAccount	
<<CustomerAddress1>>	CustomerAddress1	
<<CustomerAddress2>>	CustomerAddress2	
<<CustomerCity>>	CustomerCity	
<<CustomerState>>	CustomerState	
<<CustomerZIP>>	CustomerZIP	
<<CreatedDate>>	CreatedDate	Run Date of Package
<<PropertyPhoto>>	Property Photo	Subject Parcel Photo from TItleFlex

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.

Note that the Property Photo tag will insert the photo from the Subject Property tab into the Word template. This one is unique to Packages.

Farm Tags:

Key	Description	Note
<<SalesRepFirstName>>	SalesRepFirstName	Title Company Sales Rep
<<SalesRepLastName>>	SalesRepLastName	
<<SalesRepEmail>>	SalesRepEmail	
<<SalesRepPhone>>	SalesRepPhone	
<<CustomerFirstName>>	CustomerFirstName	Your Customer's Contact Information
<<CustomerLastName>>	CustomerLastName	
<<CustomerEmail>>	CustomerEmail	
<<CustomerCompany>>	CustomerCompany	
<<CustomerOfficePhone>>	CustomerOfficePhone	
<<CustomerMobilePhone>>	CustomerMobilePhone	
<<CustomerAccount>>	CustomerAccount	
<<FarmName>>	FarmName	Farm Details
<<NumberofProperties>>	NumberofProperties	
<<ReportName>>	ReportName	
<<CustomerAddress1>>	CustomerAddress1	Your Customer's Contact Information
<<CustomerAddress2>>	CustomerAddress2	
<<CustomerCity>>	CustomerCity	
<<CustomerState>>	CustomerState	
<<CustomerZIP>>	CustomerZIP	
<<CreatedDate>>	CreatedDate	Run Date of Farm
<<ParametersAndConstraints>>	ParametersAndConstraints	Farm Parameters

The Farm key fields include a few extra fields to identify the farm name, number of properties and the report used.

TitleFlex will use the Parameters and Constraints field to show the filters used for the farm (e.g. geography, property characteristics, transactions, etc.).

You will use the fields listed in the Key column on your Word template

Designing Your Word Template

This example is using the Sample Cover House document. The sample gives you a quick idea of what you can do by copying and pasting the Key tags into the Word document.

Before We Begin:

Please make sure you are comfortable working with tables in Word. Using tables in Word is key to designing a clean, professional, cover page.

Example of the stock Sample Cover House template:

Courtesy of   <<SalesRepFirstName>> <<SalesRepLastName>>   <<SalesRepEmail>>

<<SalesRepPhone>>

<<FarmName>>
<<NumberofProperties>> properties
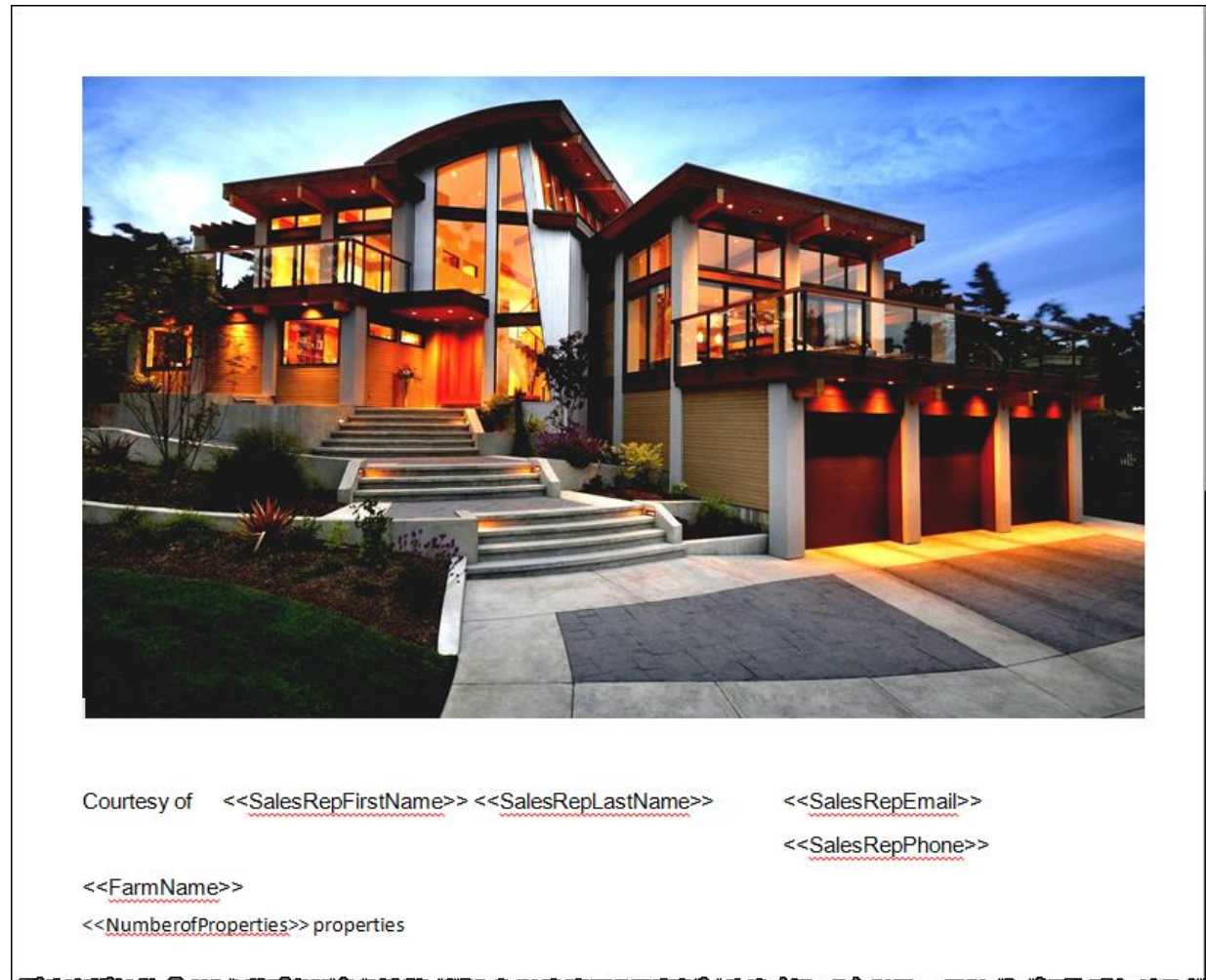
Note that the way the Key tags are setup is how TitleFlex will use this template if you simply uploaded back into TItleFlex, named it and saved it. However, most will want to change the layout of the fields to match what their company would prefer. Start by deleting the existing fields.

Next, insert a table below the existing image.
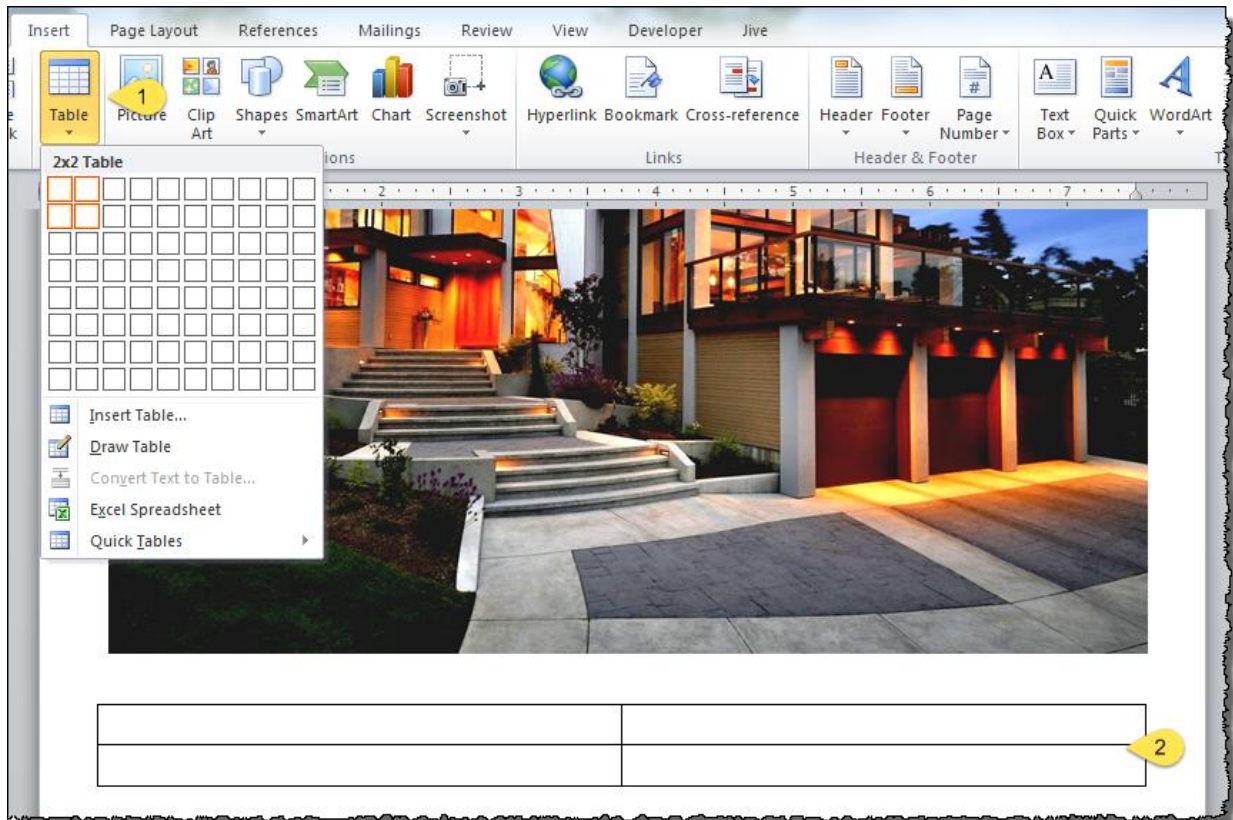
Now enter your captions and copy the Key tags into the table. Using a table will allow you to more easily format your information into columns or align them on the page.

Prepared for	<<CustomerFirstName>> <<CustomerLastName>>
	<<CustomerCompany>>
From:	<<SalesRepFirstName>> <<SalesRepLastName>>
	<<SalesRepEmail>>
	<<SalesRepPhone>>
Farm Filters	<<FarmName>>
	<<NumberofProperties>>
	<<ParametersAndConstraints>>

Borders, font, font size, color, etc. will carry over to the final cover page.

Using tables in Word will also allow you to insert additional graphics, such as shown below. Graphic can be centered in the table cell so that it prints correctly. The graphic of the house can also be deleted and replaced with a graphic from the customer or other graphic.

Prepared for	*<<CustomerFirstName>> <<CustomerLastName>>*
	<<CustomerCompany>>
From	<<SalesRepFirstName>> <<SalesRepLastName>>
	<<SalesRepEmail>>
	<<SalesRepPhone>>
Farm Filters	<<FarmName>>
	<<NumberofProperties>>
	<<ParametersAndConstraints>>

In this example, the borders have been removed so they will not print and the font has been emphasized (bold, italics, font size increased, and color added).

You can align the tags (center, left, right) to provide additional formatting. The parameters and constraints tag, for example, can be centered in the table cell to provide some emphasis. Leverage Word's formatting abilities to design your cover page.

Make sure to Save As and rename your new template. The next step will be to upload the template into TitleFlex.

Uploading Your Word Template

In TitleFlex, click the More menu > Company Admin. Select Package or Farm Cover, as appropriate. Click New Cover, name your cover page, select MS Word as the template type and click Choose File to select your newly created Word template.
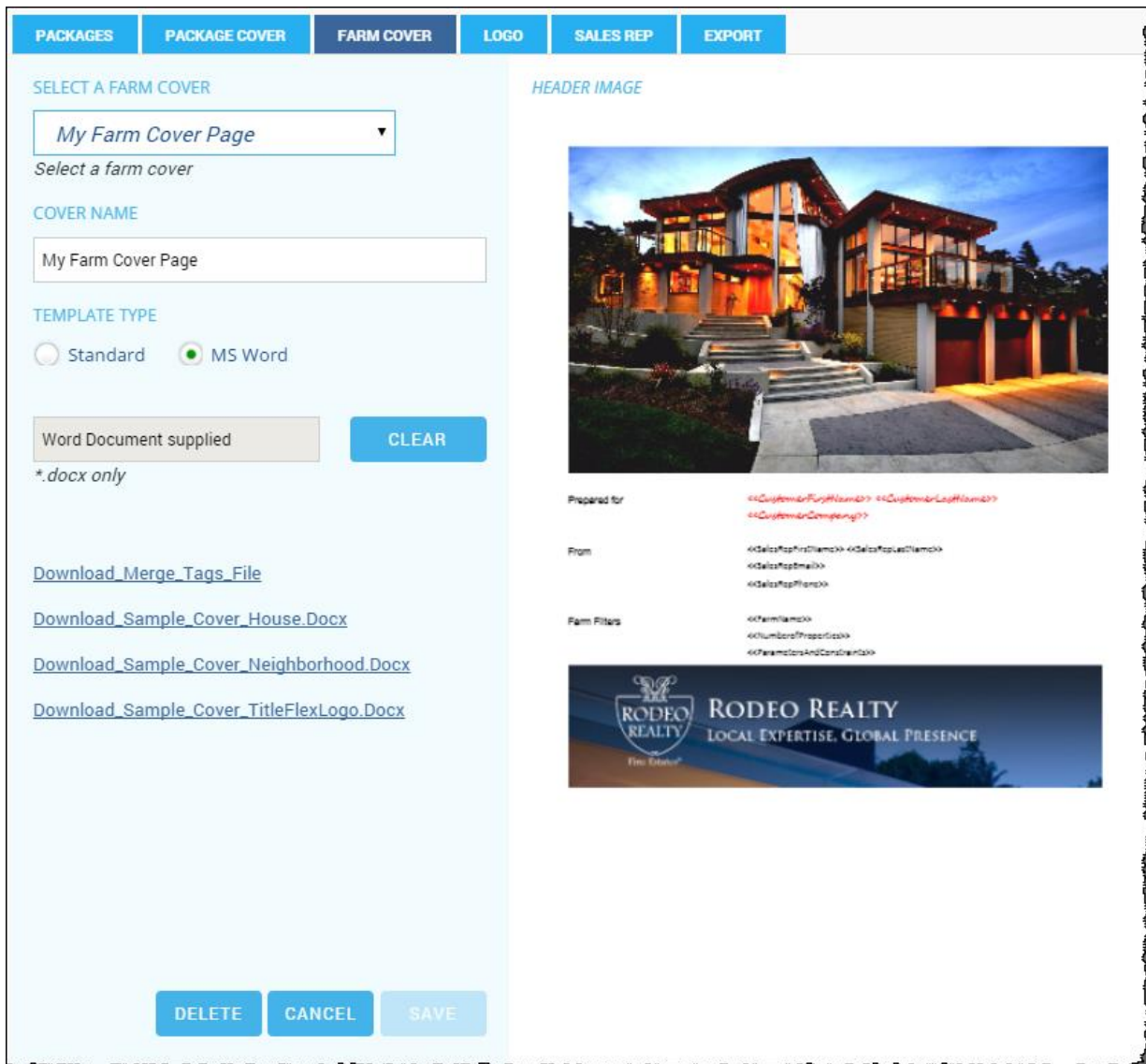

In the Open dialog box, navigate to your Desktop (or the location where you saved your template), select the template, and click Open.
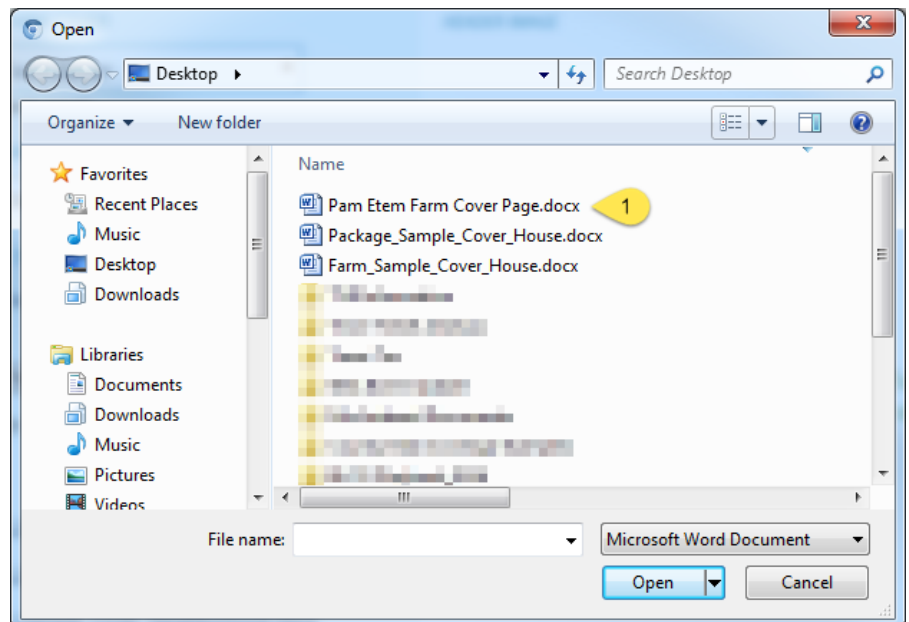
TitleFlex will upload the template, as shown here.

Make sure to click Save to save you template into TitleFlex. This is what the Farm or Package dialog will look like once the template is uploaded.

This process will work for either farms or packages.

Using Your Cover Page

Packages:

After locating the subject property and generating the report package for your customer, click the Print, Save or Email button at the bottom of the TitleFlex window.

In the dialog box, select a cover page and click Print (or Save or Email)

Finished Cover Page Examples:
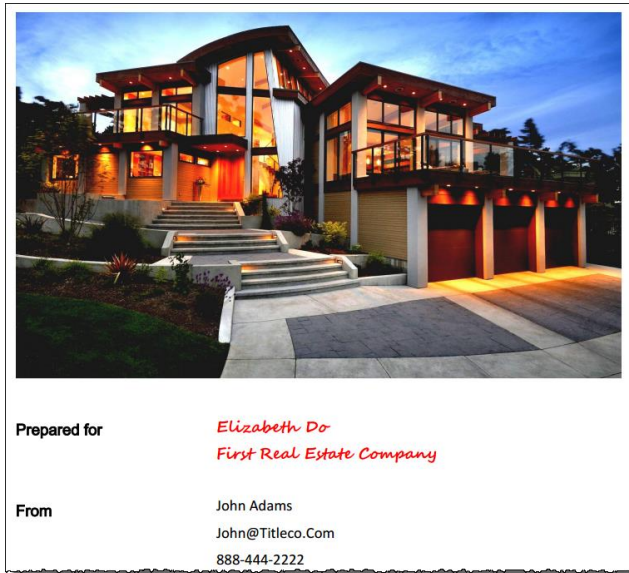
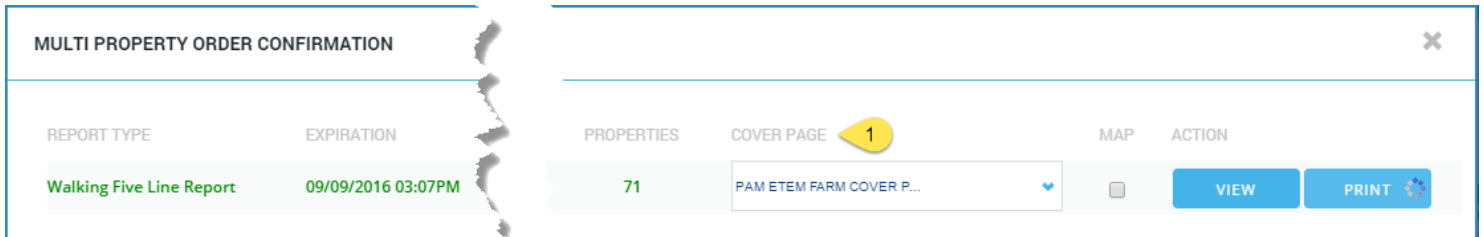

Resulting Package Cover Page

Recall that the Word template used the following Key tags:

<<SalesRepFirstName>>
<<SalesRepLastName>>
<<SalesRepEmail>>
<<SalesRepPhone>>
<<CustomerFirstName>>
<<CustomerLastName>>
<<CustomerCompany>>

Cover Pages can also be inserted ahead of the multi-line reports:

Note the farm information. The Key tags that were used for that section include the farm name, number of records and parameters and constraints:

<<FarmName>>
<<NumberofProperties>>
<<ParametersAndConstraints>>

TitleFlex will populate the Key tags you copied and pasted into the Word template with the pertinent information.

Leveraging Word to build your cover page templates will give you considerably more flexibility and formatting power and is the recommended option.