

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 Pages

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.

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

Transfers & Conveyances - Cur

Date	Document
10/02/2005	Deed Transfer
09/23/2005	Deed Transfer
09/23/2005	Deed Transfer
02/4/2005	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: 12/31/2007
Assessor Parcel #: 141-334-2016-17
Tax Year: 2016-17

2016-17 Taxes

Inst/ment	Tax Type / Use
Inst/ment 1	Partial
Inst/ment 2	Partial

Assessment Details

Jurisdiction: None Tax
Change Co Sanitation Dist (EM-GS)
Costa Mesa Sanitary Dist

Listing History

Date: Status: There is no listing history data available.

Property Details - Public Record

Land Use: SFR
Zoning:
Year Built / Est. 1963 / 1963
Style:

Open Liens - Current Owner

Date	Position / Type
06/09/2006	1st / Trust Deed/Mortgage

Involuntary Liens - Current Owner

07/29/2004 through 01/09/2017
Debtors: Shana Duguez / Robert J. Conlness

Prior Loan History - Current Owner

Date	Type
09/23/2005	Trust Deed/Mortgage

Cover Page Content:

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

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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.

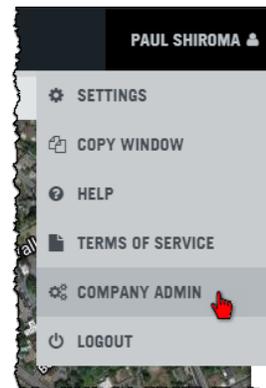
Building the Cover Page

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.



COMPANY ADMIN

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

IMPORT
IMPORT CUSTOMER RECORDS

Select a Farm Cover

Select a Cover

Cover Name

Template Type

Standard MS Word

Choose File No file chosen

*.docx only

[Download_Merge_Tags_File](#)

[Example Package Cover Page](#)

[Sample Cover House](#)

Delete Cover

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
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

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



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

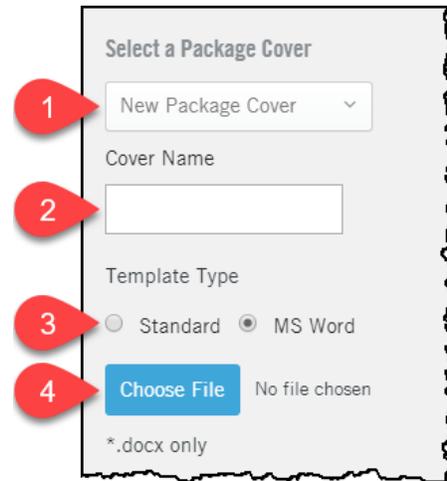
Uploading Your Cover Page

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.



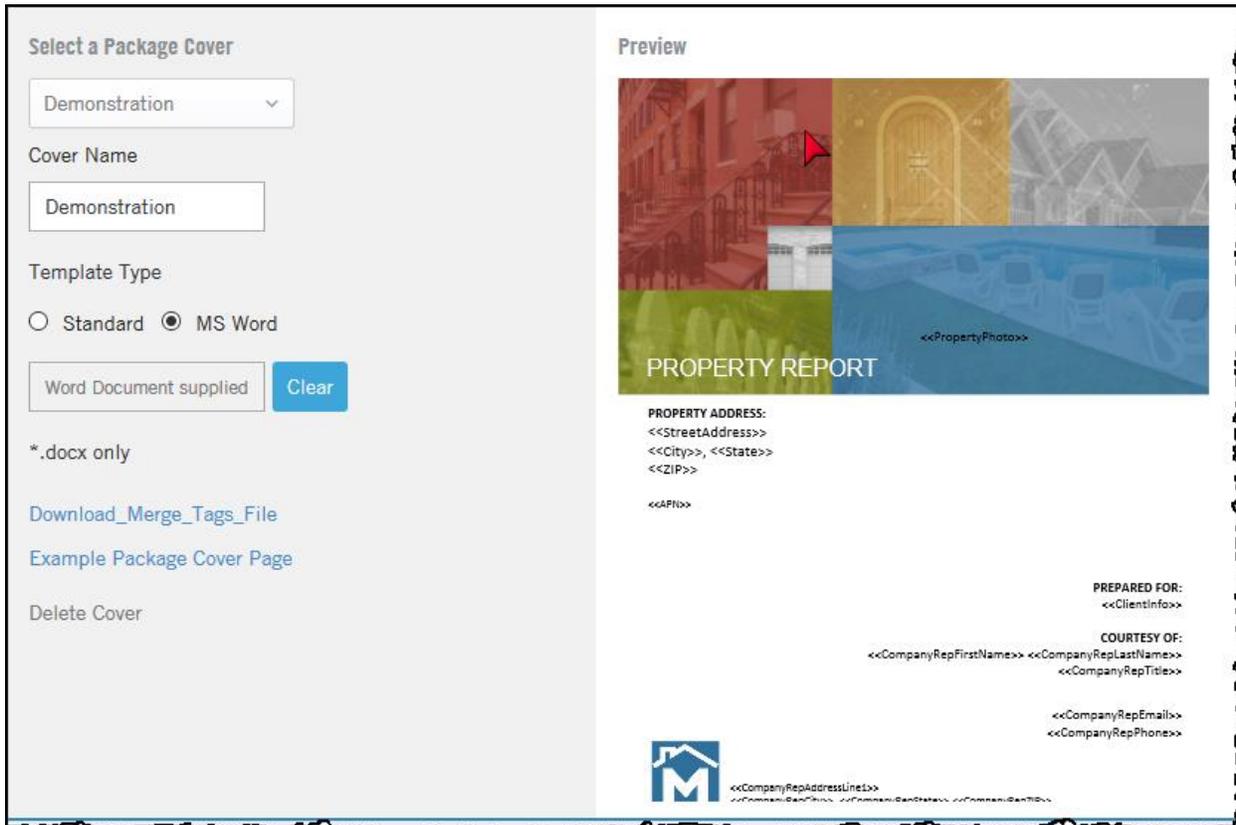
The screenshot shows a dialog box titled "Select a Package Cover". It contains a dropdown menu with "New Package Cover" selected, indicated by a red callout '1'. Below it is a text input field for "Cover Name", indicated by a red callout '2'. Under "Template Type", the "MS Word" radio button is selected, indicated by a red callout '3'. At the bottom, there is a blue "Choose File" button and the text "No file chosen", indicated by a red callout '4'. The file type filter is set to "*.docx only".



The screenshot shows a file upload field with the text "Package_Example_Cover" and a blue "Clear" button. Below the field, 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.



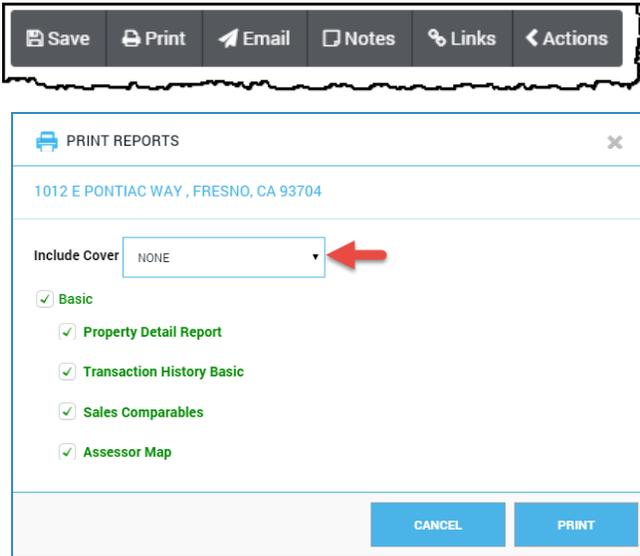
The screenshot shows the "Select a Package Cover" dialog box on the left and a "Preview" section on the right. The dialog box has a dropdown menu with "Demonstration" selected, a "Cover Name" field with "Demonstration", and "MS Word" selected under "Template Type". There is a "Word Document supplied" button and a "Clear" button. The preview section shows a property report cover page with a collage of images and the text "PROPERTY REPORT". Below the title, it lists "PROPERTY ADDRESS:" followed by placeholders for StreetAddress, City, State, and ZIP. At the bottom, it lists "PREPARED FOR:" followed by placeholders for ClientInfo, CompanyRepFirstName, CompanyRepLastName, CompanyRepTitle, CompanyRepEmail, and CompanyRepPhone. There is also a logo for "M" and a placeholder for CompanyRepAddressLine1.

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

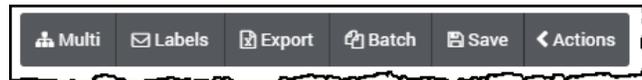
1012 E PONTIAC WAY , FRESNO, CA 93704

Include Cover: NONE

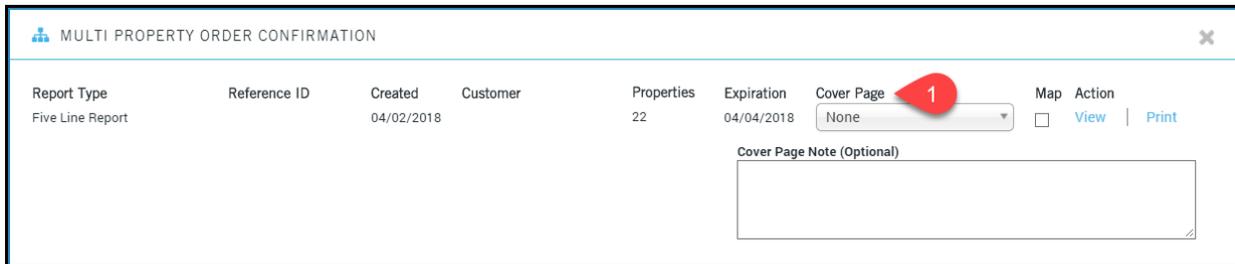
- Basic
 - Property Detail Report
 - Transaction History Basic
 - Sales Comparables
 - Assessor Map

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.

COMPANY ADMIN

PACKAGES MANAGE COMPANY PACKAGES	Logo
PACKAGE COVER MANAGE PACKAGE COVER PAGES	Company Name <input type="text" value="Team Etem"/>
FARM COVER MANAGE FARM COVER PAGES	Logo Image <input type="text" value="Team Etem Logo.jpg"/> <input type="button" value="Clear"/>
LOGO MANAGE REPORT FOOTER LOGO	Recommended size: 168x48 PNG and JPG only
SALES REP MANAGE SALES REPS	Footer Text <input type="text" value="Exceeding Your Expectations"/>
EXPORT EXPORT CUSTOMER REPORTS	220 character limit
IMPORT IMPORT CUSTOMER RECORDS	

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

Property Tax:	\$2,817.90	Improved %:	29.49%
Exemption:	Homestead	Delinquent Year:	

 Exceeding Your Expectations

Sales Rep

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

The screenshot shows the 'COMPANY ADMIN' interface. On the left is a sidebar with navigation options: 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 'SALES REP' tab is selected. The main content area shows a list of sales reps: Grover Cleveland, Ray Learn, Abraham Lincoln, Alok Mishra, David Ortiz, Chirl Paul, Mike Trout, George Washington, and John Williams. Below the list is a 'Create New' button. To the right is a form to create a new sales rep with fields for First Name (Jimmie), Last Name (Reese), Email (JReese@mlb.com), and Phone (202-555-1212). There are 'Cancel' and 'Save' buttons at the bottom right of the form.

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
<<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

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
<<CreateDate>>	CreateDate
<<ParametersAndConstraints>>	ParametersAndConstraints
<<Cover Page Note>>	CoverPageNote

MULTI PROPERTY ORDER CONFIRMATION ✕

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.



<<PropertyPhoto>>

PROPERTY REPORT

PROPERTY ADDRESS:

<<StreetAddress>>

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

<<APN>>

PREPARED FOR:

<<ClientInfo>>

COURTESY OF:

<<CompanyRepFirstName>> <<CompanyRepLastName>>

<<CompanyRepTitle>>

<<CompanyRepEmail>>

<<CompanyRepPhone>>



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affiliates. All other trademarks are the property of their respective owners.
<<CompanyRepAddressLine1>>
<<CompanyRepCity>>, <<CompanyRepState>> <<CompanyRepZIP>>



<<PropertyPhoto>>

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

PREPARED FOR:

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

Your Representative:

<<SalesRepFirstName>>
<<SalesRepLastName>>

<<SalesRepEmail>>
<<SalesRepPhone>>



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Making Your Dreams Come True!*