

# announcement: new portal!

## features:

### SALES FOLDER (MANAGERS ONLY)

- VIEW FINANCIAL DOCUMENTS INCLUDING INCOME STATEMENTS, BALANCE SHEETS & CAPTURE REPORTS.
- VIEW "COMPANY AT A GLANCE" WITH IMPORTANT DATA SORTED BY YEAR FROM 2011-PRESENT.

### RESOURCES FOLDER

- LICENSING DOCUMENTS: DOWNLOAD BEST PRACTICES, E&O, FIDELITY, SURETY AND LICENSE INFORMATION. ALSO DOWNLOAD W9.
- UNDERWRITING BULLETINS: VIEW ALL UW BULLETINS APPLICABLE TO THE STATES YOU ARE LICENSED.
- TRAINING: VIEW TRAINING VIDEOS ASSIGNED TO YOU. DOWNLOAD TESTS TO COMPLETE AND SEND TO TRAINING MANAGER. VIEW OUTSTANDING AND COMPLETED TRAININGS.
- TEMPLATES: CREATE AUTO BRANDED TEMPLATES FOR HAPPY HOURS, LUNCH & LEARNS, SEMINARS AND GENERAL EVENTS.
- ORDERS: PLACE ORDERS FOR ALL BRANDED ITEMS, INCLUDING BUT NOT LIMITED TO ENVELOPES, PENS, CLOSING FOLDERS, NOTE PADS, KEY CHAINS, ETC.

### SETTINGS

- PROFILE: UPDATE YOUR PERSONAL BIO, PASSWORD, CELL PHONE AND LinkedIn ACCOUNT INFORMATION.
- HELP: CONTACT THE WEBMASTER FOR ANY ISSUES YOU COME ACROSS WHILE IN THE SYSTEM.

### LOG OFF

- LOG OFF OF THE SYSTEM WHEN YOU ARE COMPLETE.

### WEB TOOLS FOLDER\*

- STAFF: MAKE CHANGES TO STAFF INFORMATION (MANAGERS ONLY)
- LOCATIONS: ADD, DELETE OR CHANGE ADDRESS INFORMATION INCLUDING PHONE AND FAX NUMBERS.
- DOCUMENTS: UPLOAD DOCUMENTS THAT WILL BE VISIBLE TO THE PUBLIC ON YOUR WEBSITE. GROUP THEM INTO FOLDERS FOR EASE OF NAVIGATION ON THE WEBSITE.
- POSTS: CREATE ADDITIONAL CONTENT FOR YOUR WEBSITE. POST PRESS RELEASES OR OTHER INFORMATION TO DRIVE TRAFFIC TO YOUR WEBSITE. (MANAGERS ONLY)
- LINKS: ADD, REMOVE, OR CHANGE LINKS ON THE WEBSITE FOR PREFERRED PROVIDERS AND ASSOCIATES.
- EVENTS: POST EVENT INFORMATION DIRECTLY TO YOUR WEBSITE. COLLECT RSVP THROUGH [WWW.YOURDOMAINHERE.COM/RSVP](http://WWW.YOURDOMAINHERE.COM/RSVP). EASILY MONITOR WHO HAS AND HASN'T RESPONDED WITH ALL INFORMATION STORED IN THE DATABASE HERE.
- TESTIMONIALS: ADD, REMOVE OR CHANGE TESTIMONIALS POSTED TO YOUR WEBSITE.

\*ALL CHANGES MADE IN THE WEB TOOLS FOLDER WILL AFFECT YOUR WEBSITE AND MAKE CHANGES THERE INSTANTLY.

### USERNAME AND PASSWORD

- USERNAME IS YOUR EMAIL ADDRESS AND PASSWORDS WILL BE EMAILED WHEN THE SITE IS LIVE.

SAMPLE SCREEN SHOTS OF PORTAL

ACCESS: [ADMIN.TITLEALLIANCE.COM](http://ADMIN.TITLEALLIANCE.COM)