SureClose Advantage® Branding

Reference Guide 3.6

February 2013

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Introduction

The purpose of this document is to provide you with information necessary to create custom SureClose sites using the new Branding feature.

What is Branding?

With Branding, you have the option to set up a custom SureClose Advantage site that looks very similar to your company website. With custom branding, you can now control background colors and the colors of your menus and title bars. You can add your company logo, various images, as well as, your marketing copy and descriptions to the Welcome, About Us, Contact Us and My Transactions pages. In addition, using custom hyperlinks, you can now easily take your customers where you want them to go.

When your customers log in, they will feel as though they are logging directly into your company website, rather than a separate system. Not only is this good for business but makes things easier for your customers since they only have to log in once.

Note

> It is recommended that custom branding be used by Independent Title Agents, Real Estate Brokers, and MLS members. Stewart Affiliate offices should continue to use Stewart Online. For more information about Stewart Online, please contact the Customer Care Center at 1.877.800.3132 or customercare@propertyinfo.com.
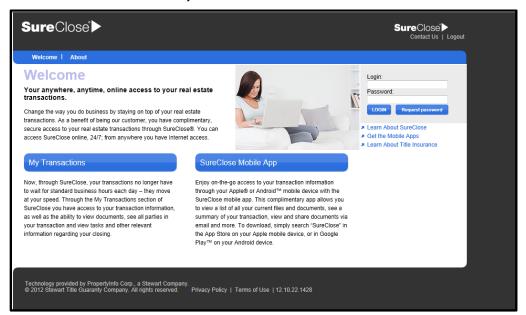
How This Works

When branding is set up and a custom site is created, SureClose generates a unique URL. Using this URL a customer can log directly into your branded site. You can also place this URL on your existing website for customers to access. Any new user invitations sent from SureClose can also be set up to include this URL for users to log in.

Do I have to set up a branded site?

No, you do not have to set up a branded site. You will still have the option to use SureClose Advantage as it exists today, which looks similar to this:

Or, you can use **Branding** to create a branded site similar to your company website, or you can select to use the default brand to have your site look similar to this:
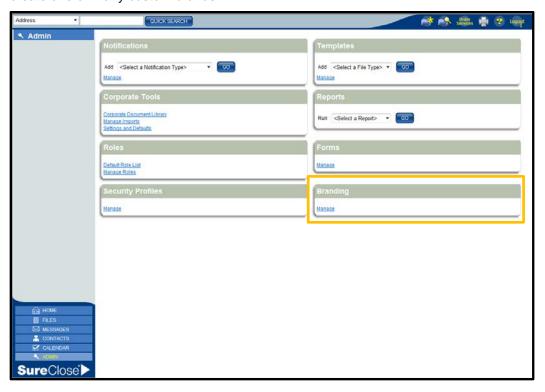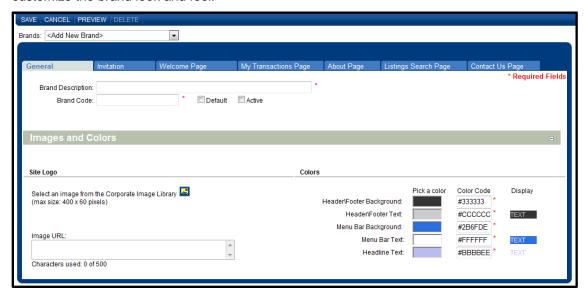
REQUIRED SECURITY

In order to see the **Branding** section under the Admin menu, you must have permission to create or edit branding profiles. You must also belong to a company that is linked to a corporation.

Admin

With these requirements met, a new **Branding** option displays under the Admin menu. Use this option to create one or many custom brands.

Selecting **Manage** displays the Branding page with several tabs. Each tab has several options used to customize the brand look and feel.
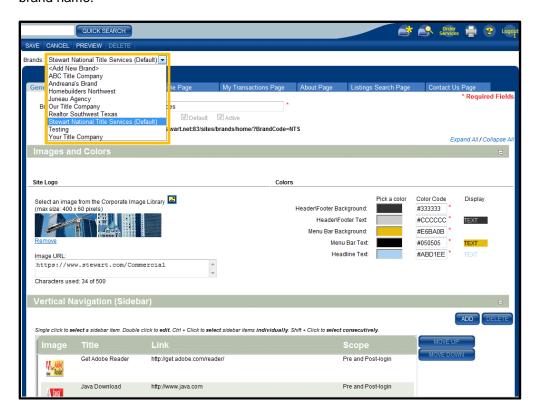
General Tab

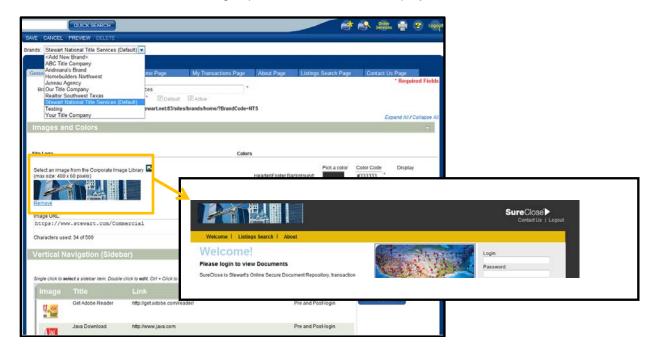From the General tab, you can:

- Create and delete brands

- Define which brand to use as the default

- Activate/Deactivate a brand

- Upload images

- Customize brand colors

- Define what information or images display

As a requirement, each brand must have a unique description and code. Saving the brand creates the branded URL and it displays under the Brand Description and Brand Code. You can create one or many brands. If you decide to delete a brand or brands, you can easily do so by selecting **Delete**.

If multiple brands are created, then select the **Default** check box to indicate which should be considered the default and included when sending new user invitations from SureClose. Once saved, the branded site name displays in the **Brands** selection list and displays with the word *(Default)* to the right of the brand name.
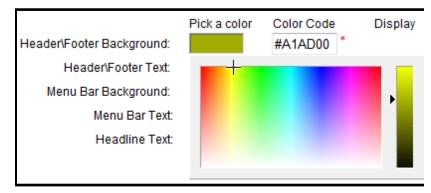
Under **Images and Colors**, you can upload images that represent your company or business to display in the header section. Notice the image uploaded in this section displays in the header of the website below.

Using the color palette, you can control the following:

- Header and footer background color
- Header and footer text color
- Menu bar background color
- Menu bar text color
- Headline text color

Note

The *Menu bar background color* also sets the *button background* color.

Under **Vertical Navigation (Sidebar)**, you can select various items to display vertically down the right side of page. For example, you may want to include links to other websites to further assist your customers making it easier and faster to do business with you. Notice the sidebar items added to the website below.
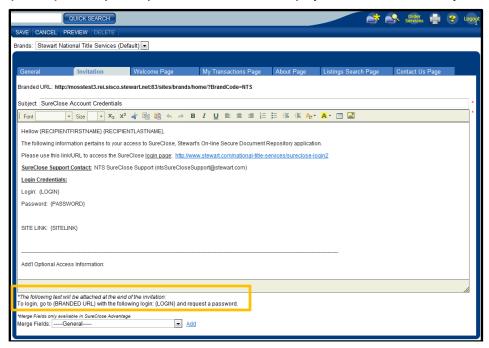

You can add titles with or without images:

- If adding titles with no image, then the title displays as a hyperlink to the external website.
- If adding titles and images, then the image is linked and the title can be hovered over to display additional text.
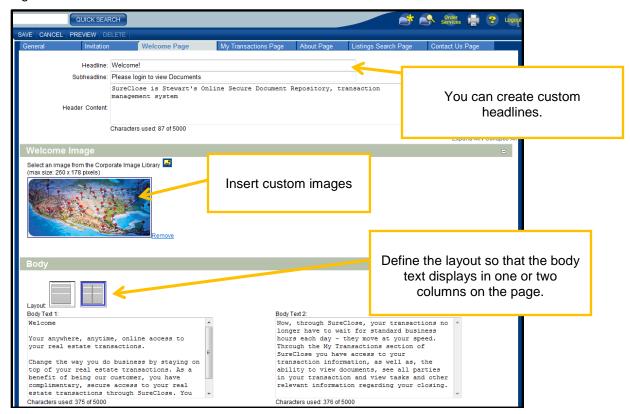
Invitation Tab

Use the Invitation tab to create the invitation to send to parties whom you want to log into your branded site. You can create a custom Subject line and message body, however, keep in mind that the following line will be added to the end of your invitation, *To log in, go to {BRANDED URL} with the following {LOGIN} and request a password.* Notice this displays at the end of the body text field below.
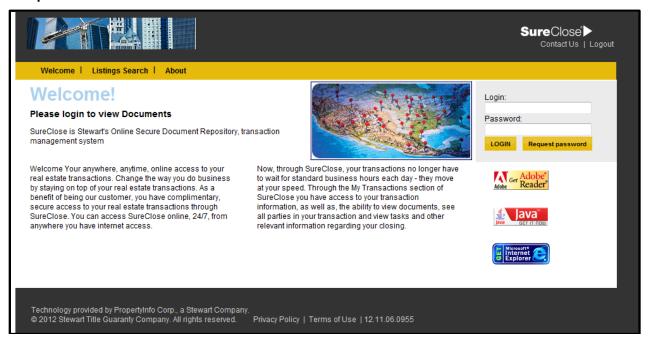

Use the Contacts tab from within SureClose Advantage to select which parties should receive the invitation to the branded site. Any parties selected will receive the email notification in their designated Inbox.

Welcome Tab

Using the Welcome tab, you can customize the appearance of the Welcome page where your customers log in.

You can create custom headlines.

Insert custom images

Define the layout so that the body text displays in one or two columns on the page.
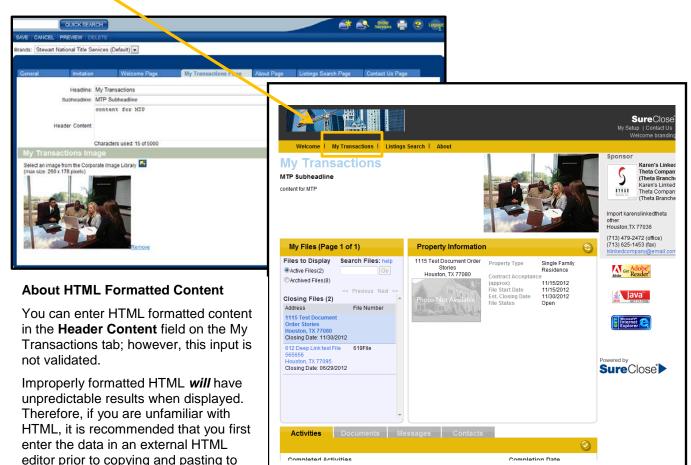
Sample Preview

About HTML Formatted Content

You can enter HTML formatted content in the **Header Content** and **Body Text** fields on the Welcome Page tab; however, this input is not validated.

Improperly formatted HTML *will* have unpredictable results when displayed. Therefore, if you are unfamiliar with HTML, it is recommended that you first enter the data in an external HTML editor prior to copying and pasting to SureClose.
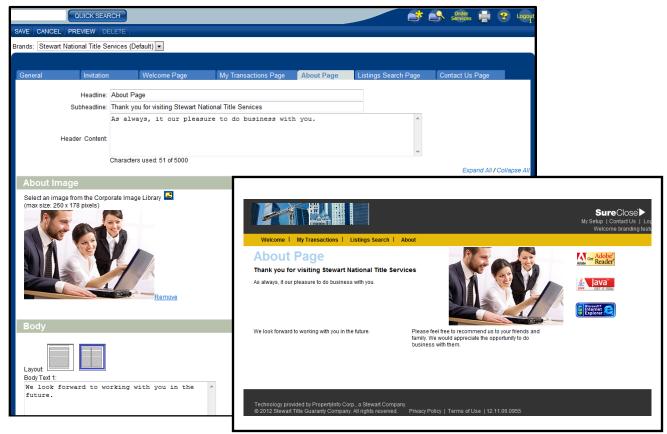
My Transactions Tab

Using the My Transactions tab, you can change the content and image that displays when a user logs in or clicks the **My Transactions** link at the top of the page.

About HTML Formatted Content

You can enter HTML formatted content in the **Header Content** field on the My Transactions tab; however, this input is not validated.

Improperly formatted HTML *will* have unpredictable results when displayed. Therefore, if you are unfamiliar with HTML, it is recommended that you first enter the data in an external HTML editor prior to copying and pasting to SureClose.

About Page Tab

Use the About Page tab, to share additional information about you or your company with your customers.
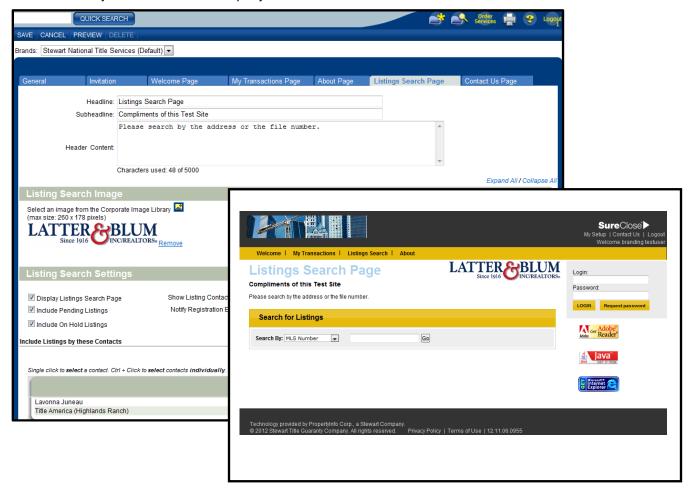

About HTML Formatted Content

You can enter HTML formatted content in the **Header Content** and **Body Text** field on the About Page tab; however, this input is not validated.

Improperly formatted HTML *will* have unpredictable results when displayed. Therefore, if you are unfamiliar with HTML, it is recommended that you first enter the data in an external HTML editor prior to copying and pasting to SureClose.

Listing Search Tab

Use the Listing Search Page tab to display individual and company listings as well as additional information for your customers or company.

To feature listing on your company's branded site, select the following check boxes:

- Under Listing Search Settings on the Listing Search Page tab, select the **Display Listings Search Page** check box.
- In the File Detail section of a listing file, check the Include **Property in Public Search** check box.

Under the Include Listings by these Contacts on the Listing Search Page tab, select which individual or company files you would like to display on your company's listing search.
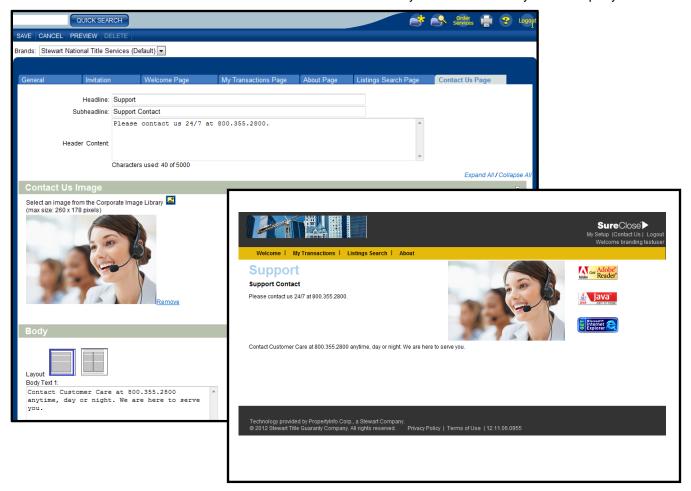
About HTML Formatted Content

You can enter HTML formatted content in the **Header Content** fields on the Listing Search tab; however, this input is not validated.

Improperly formatted HTML *will* have unpredictable results when displayed. Therefore, if you are unfamiliar with HTML, it is recommended that you first enter the data in an external HTML editor prior to copying and pasting to SureClose.

Contact Us Tab

Use the Contact Us tab to share additional contact information with your customers for you or company.

About HTML Formatted Content

You can enter HTML formatted content in the **Header Content** and **Body Text** fields on the Contact Us Page tab; however, this input is not validated.

Improperly formatted HTML *will* have unpredictable results when displayed. Therefore, if you are unfamiliar with HTML, it is recommended that you first enter the data in an external HTML editor prior to copying and pasting to SureClose.

Additional Information

Training

Through SureClose Advantage Online Help, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to: http://portal.propertyinfo.com/sureclose-advantage1.

Technical Support

For technical support, contact PropertyInfo Customer Care at 1.877.800.3132 or customercare@propertyinfo.com.