

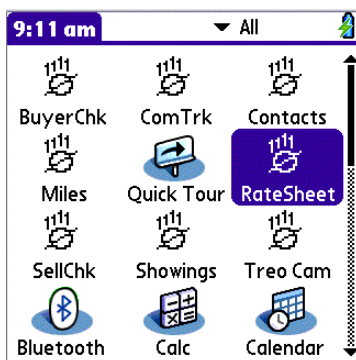
RateSheet for Treo

RateSheet for Treo is a Palm Operating System program for Real Estate Agents and Mortgage Loan Officers, which is designed to assist them in having accurate title insurance information in the palm of their hand. By using this program users can have the title rates for one or more companies available; can store title rate and escrow information required by their State; go directly to either their Treo's Contact information or to the In-hand Contact for Treo program to contact a title representative; and make update to title information as required.

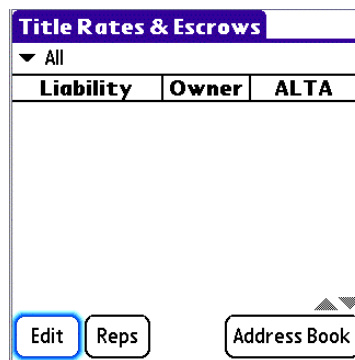
This program has been written to take advantage of the features of Palm Treo 650 and Treo 700p Smartphones, such as the 5-Way Navigation Button that allows one-handed navigation and selection of commands by using the Blue Focus Ring. This program is also designed with larger buttons so that users may navigate and make selections using their fingertips or fingernails.

Even though designed for use on Palm Treos, RateSheet for Treo will also operate on Palm handhelds using Palm OS 3.5 and above. With the newer Palm handhelds such as the Palm T/X and Palm LifeDrive Manager, this program can also be navigated one-handed.

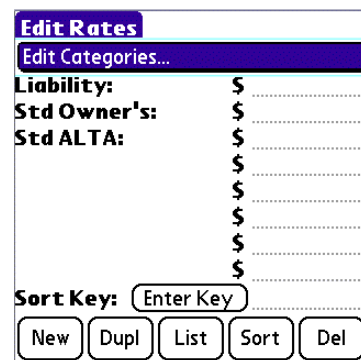
In the instructions below, actions are shown with the "Blue Focus Ring" highlighting the appropriate button, pull down list, dates, etc. On a Treo Smartphone or newer Palm handheld you have only to press down on the "Select Button" to trigger the action. Or, you may tap the item with your stylus or fingertip/fingernail.



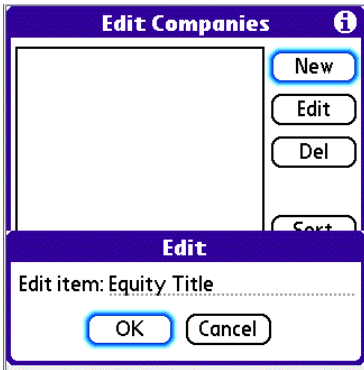
On our Treo's menu screen we select the "RateSheet" icon. Note that with all actions on Treo smartphones you can scroll and select using your Treo's 5-Way Navigation Button and Blue Focus Ring highlighter.



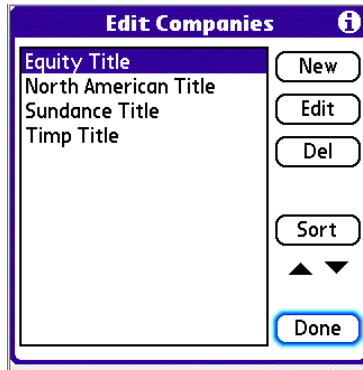
Upon going into the program for the first time the above screen appears. We must select the blue highlighted "Edit" button to begin. The "Reps" and "Address Book" buttons shown on the screen are used to contact title or escrow representatives from this program.



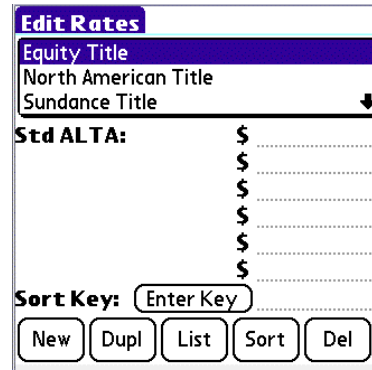
Selecting the "Edit" button will take us to this screen where our first action will be to list our title companies. This is done by first selecting the "Category" list at the top of the form. Upon selecting, the words "Edit Categories" appears. We select "Edit Categories" again to be taken to the "Edit Companies" screen.



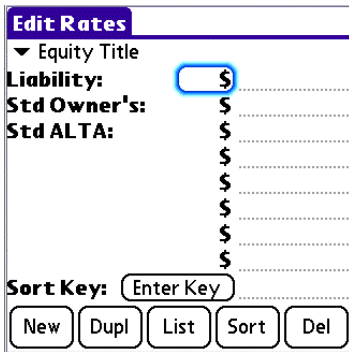
The "Edit Contacts" screen allows us to add contacts to our list, as well as to edit, delete, and sort contacts from the list. Above, we have selected the "New" button, which pops up an Edit screen onto which we enter the company's name that we want to enter into the program.



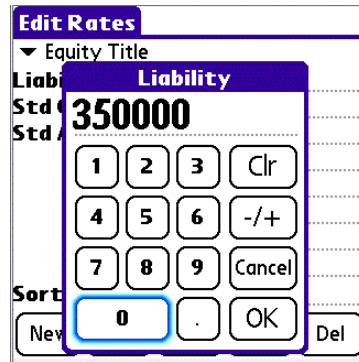
As shown above, we've entered four companies to our Edit Companies screen, and have sorted them alphabetically. When completed with this screen, we select the "Done" button to go back to the main program.



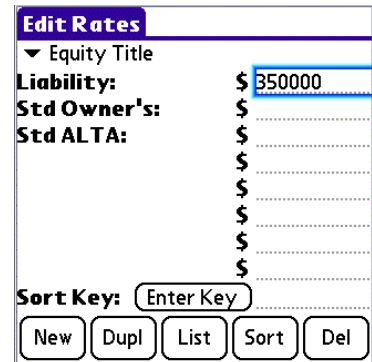
We now select the title or escrow company from our pull down list. It's important to designate the company on this list, as it will be used to filter by categories later.



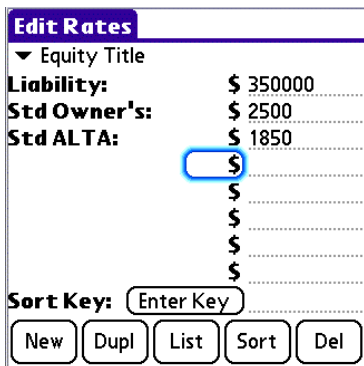
Our next process is to enter title rates onto our RateSheet. Using the Treo's 5-Way Navigation Button we can highlight the "\$" signs on this screen. These highlighted buttons are sized to allow user triggering with fingertips, fingernails, or a stylus.



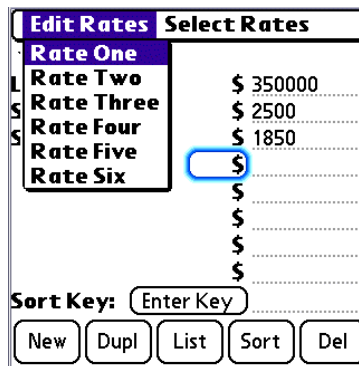
Once the "\$" sign has been selected, a pop up numeric input form is triggered, to aid in data entry. The buttons on this form are large enough for using fingers.



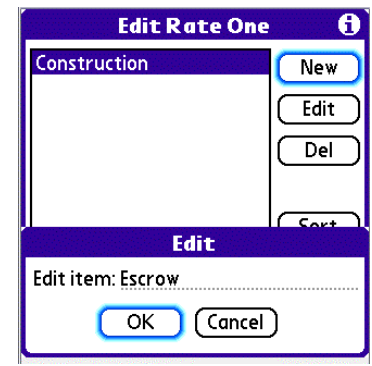
The Blue Focus Ring will also highlight the data field itself and we can enter numbers using our Treo's keyboard.



Note that the next row has an empty space preceding the "\$" sign. This is because various States have different requirements and some companies offer additional title insurance rates.



We'll assign the Rates to these categories. In this case we'll add the category of "Escrow" to our RateSheet. First we'll go to the Menu bar and select "Edit Rates", "Rate One".



When selected, an Edit form will appear. We enter "Escrow" onto this form and then select the "OK" button. Then, we'll select the "Done" button on the bottom of the "Edit Rate One" screen, taking us back to the...

Edit Rates form. Now we'll again go to the Menubar and select "Select Rates", "Rate One" which will open the "Select Rate One" form.

From the "Select Rate One" form we'll highlight "Escrow" and then trigger the "OK" button...

Moving "Escrow" onto the Edit Rates form. Now we enter an Escrow rate onto the form. This same technique is used to add other rate categories to RateSheet.

Assuming that we are only adding "Escrow" to our form, we are ready to insure that our RateSheet sorts correctly. We use the "Enter Key" command to prepare our rates for sorting

This Tap Magic screen explains the best way of assigning a key to records.

Select the "Enter Key" button and a Sort Key form appears, which can be used to enter the numeric keys.

Shown above is a completed RateSheet Edit Rates form.

The easiest way to add another group of rates to the RateSheet is to select the "Dupl" button and then modify existing rates, sort key, and company. If we select the "new" button we'll also need to re-enter any rate categories for each new record.

Here we've duplicated the first RateSheet and modified the rates and sort key. By selecting the "Sort" button on the bottom of this form we'll sort the title rates numerically by the "Liability" rate.

Title Rates & Escrows		
▼ Equity Title		
Liability	Owner	ALTA
350000	2500	1850
375000	2750	1975

▲▼

Edit Reps Address Book

Shown above is the result of sorting the rates by the Liability rate. To go into the Edit Rates form from this screen, merely highlight the appropriate row and select it, or tap on that row.

Title Rates & Escrows		
▼ North American Title		
Liability	Owner	ALTA
No Records Match Category!		

▲▼

Edit Reps Address Book

Since we have set up a filtered list of companies, if we select a title company for which we have not entered any rates on the Edit Rates form, we won't have any rates listed.

Edit Rates	
▼ North American Title	
Liability:	\$ 375000
Std Owner's:	\$ 2755
Std ALTA:	\$ 1980
Escrow	\$ 2105
	\$
	\$
	\$
	\$
Sort Key:	Enter Key 0002

New Dupl List Sort Del

We'll now add rates for another title company, duplicating the Liability rate we used previously for Equity Title. We'll then sort the rates.

Title Rates & Escrows		
▼ All		
Liability	Owner	ALTA
350000	2500	1850
375000	2750	1975
375000	2755	1980

▲▼

Edit Reps Address Book

When we select the "All" company category we see two identical Liability rates, one for each company.

Title Rates & Escrows		
▼ North American Title		
Liability	Owner	ALTA
375000	2755	1980

▲▼

Edit Reps Address Book

Selecting specific companies will filter the rates on the Title Rates & Escrows screen.

Title Rates & Escrows		
▼ Equity Title		
Liability	Owner	ALTA
350000	2500	1850
375000	2750	1975

▲▼

Edit Reps Address Book

To contact title representatives directly from RateSheet for Treo we must call up the Contacts for Treo program by selecting the "Reps" button on the bottom of the page. If we want to go into the built in Treo Contacts program we select the "Address Book" button.