



ePrepare®

Master Accounts

FOR ADMINISTRATORS AND DESIGNATED USERS

If your organization has multiple ePrepare accounts, this guide shows how a master account facilitates access to any or all of them from a single login!

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CSC offers electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents nationwide. As a pioneer in this space, we deliver both speed and reliability to support smooth real estate transactions. Our intuitive, web-based platform reduces the time between closing and recordation, minimizes errors that lead to rejections, and enhances document tracking for greater operational efficiency. To learn more about our comprehensive paper and electronic recording services with coast-to-coast coverage, please visit <https://www.cscglobal.com/service/erecording>.



Our **Master Accounts** feature offers the ultimate flexibility for your team. If your organization uses multiple ePrepare accounts, you can specify which users have the ability to effortlessly switch between them at will. And an additional benefit with this paradigm is enhanced security — only one username and password is required for each applicable user.

If you are the local account administrator, email our Support Team at csc-help@cscglobal.com and request we activate this feature on your account. Provide us with the usernames requiring master account access and specify which accounts should be linked to each user.

Should you need assistance at any point, our Support Team is here to help you.

Ready to begin? Your guide starts on the next page.

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What is a Master Account?

All of our customers login through the same website, and each username is unique and linked to a single eRecording account. But what happens if one of your users needs access to multiple accounts?

One option is to create a separate username and password for each account. However, this can quickly become cumbersome for both the user and your organization.

A better solution is a **Master Account**. The user can log in as usual with a single username and password, and then use a convenient drop-down menu to switch between any authorized accounts—no extra logins required!

This makes managing multiple accounts simple and efficient.

Example of a Master Account list

- PACIFIC TITLE – COSTA MESA** ▼
 - Pacific Title – Irvine
 - Pacific Title – Long Beach
 - Pacific Title – Pico Rivera



Overview of Master Accounts

For Master Account users, a drop-down appears on the shortcuts bar listing available accounts for your organization. Users with this list can switch between any available accounts at will. Below is a brief overview of this feature:

1. On your ePrepare shortcuts bar, hover or click your mouse cursor on your master organization list ...
2. From the drop-down list, click on the account you want to make active. You will be switched to that account and your user profile will temporarily follow you.

Reminder When Adding New Users

If your profile includes the **Organization Admin** or **Account Manager** role, you have the ability to create user profiles for your organization.

How Do Master Accounts Work?

For organizations with multiple ePrepare accounts, specified users can easily switch between accounts by using the Master Account feature. These users maintain a single home user profile in their default account, which temporarily follows them as they move between accounts.

Example: Elena Mauer is an administrator with master account access to all four of her organization's ePrepare accounts:



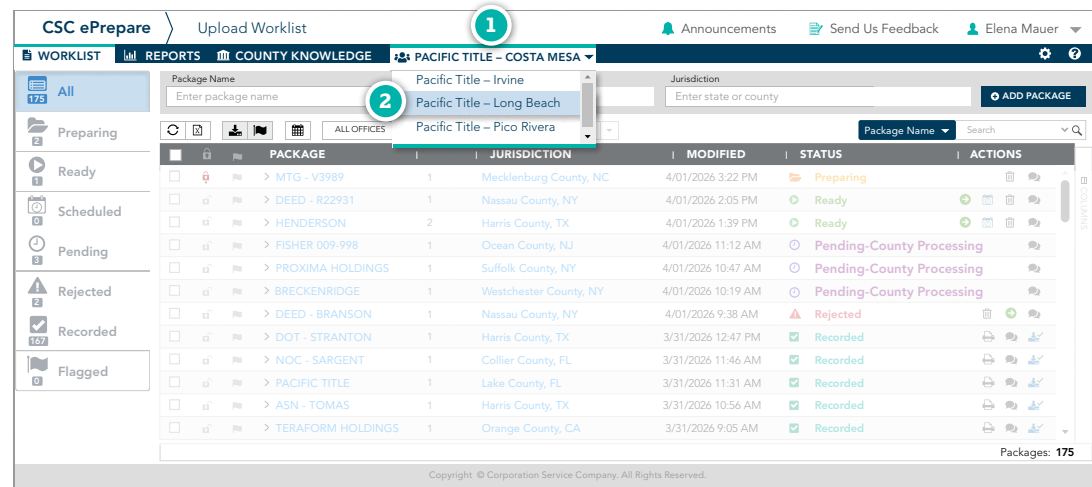
Adding a Login Account to Long Beach

If Elena wants to add a user to the **Long Beach** account, she must first switch to that account using her master account drop-down list before creating the new profile. Always double-check that you are in the correct account before creating a new user.

Requesting Master Account Access

If someone requires master account access, please contact us directly. We can only process such requests from account administrators or company executives.

FIGURE 1 | Using a Master Account list to switch accounts



Master Account Primer

Users with Master Account access should have only **one** user profile, which resides within their "home" account. When these users login to ePrepare, they are automatically logged into their home account.

However, their login profile "follows" them when they switch to another account. They do not need a login profile in other accounts to use this feature. The illustrations below provide a visual explanation:

FIGURE 2 | Pacific Title's eRecording accounts



FIGURE 3 | How Elena navigates Master Accounts

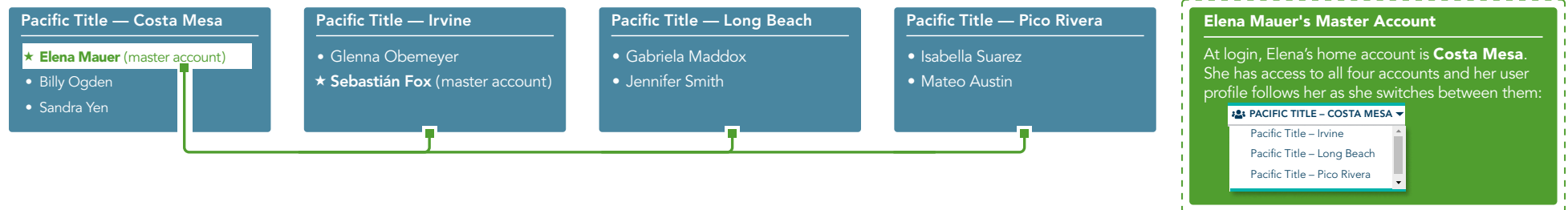
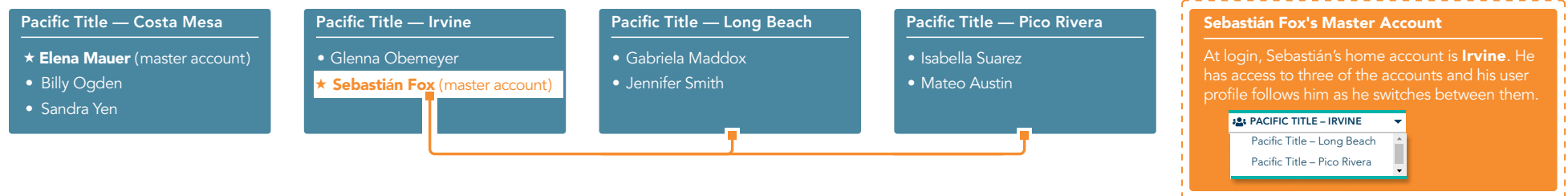


FIGURE 4 | How Sebastián navigates Master Accounts



Congratulations—This concludes our guide!

If you have any questions, please contact our CSC eRecording Support Team!

1 855 200 1150

@ csc-help@cscglobal.com

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Excel files are saved to your Downloads folder.

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ⓘ This feature is available to administrators or users with the appropriate roles. Please note that some features may require an activation fee or involve recurring charges. For more information, refer to the applicable feature guide or contact our CSC Sales Team at (866) 652-0111 or via email at erecording@cscglobal.com.

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