Titan Office
Working with orders

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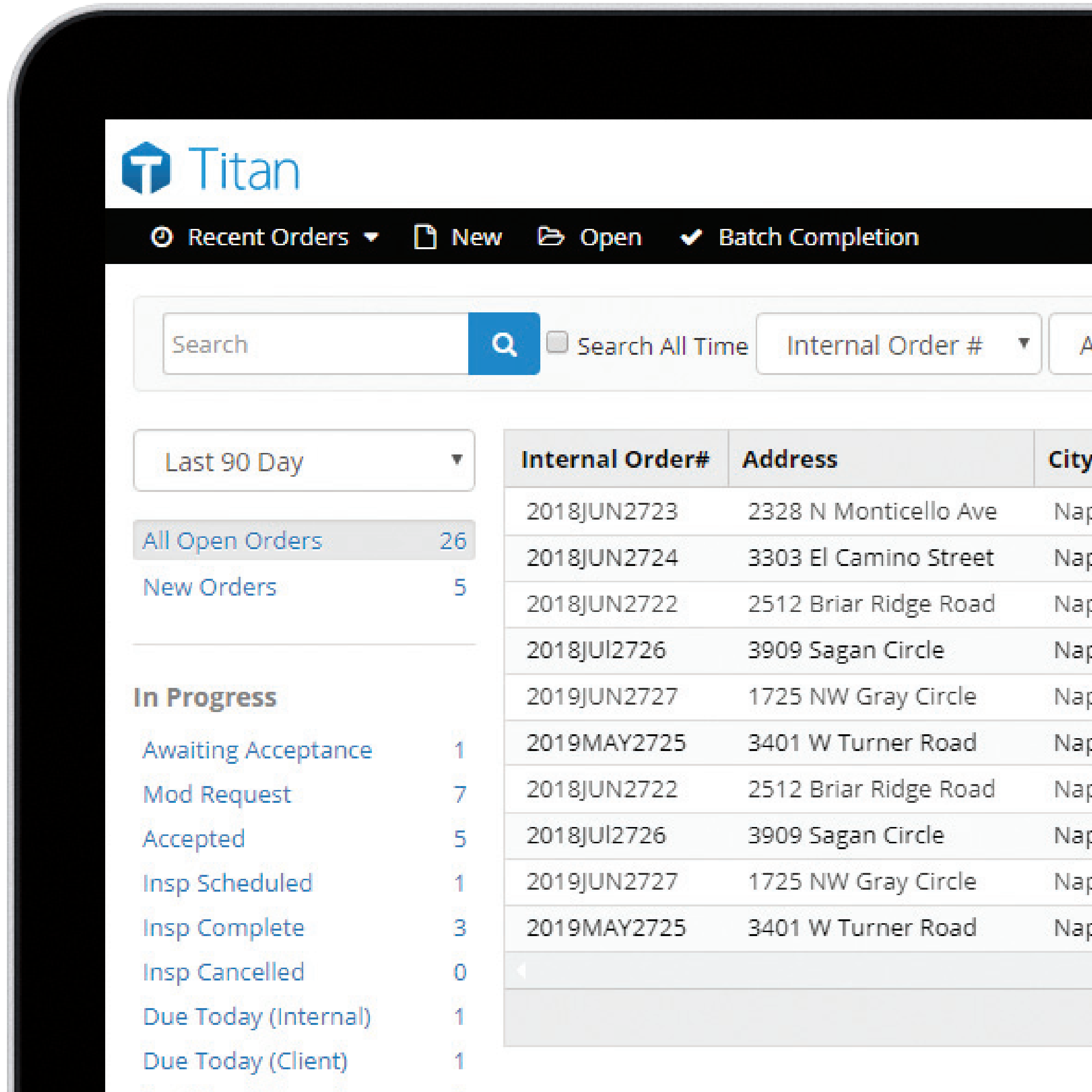


This guide shows you how to work with orders in Titan Office — from creating your first order, to sending an invoice to the client.

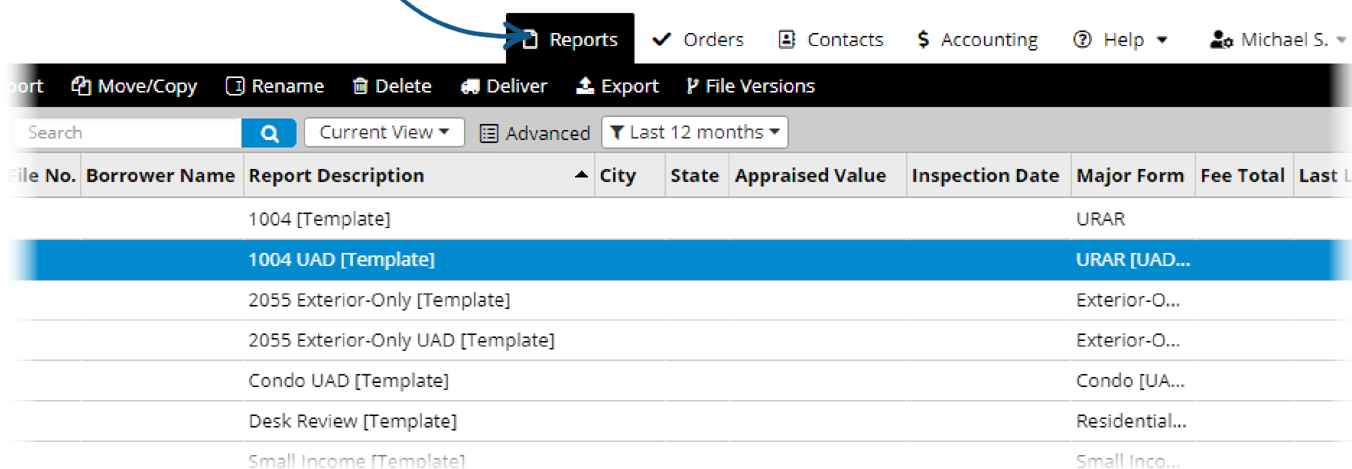
CoreLogic®
a la mode

Log in

To log in, use the same email address and password associated with your a la mode account. Click the "Forgot password" link if you need to reset your password.

To access Titan Office, simply go to www.TitanAppraisal.com and log in with your a la mode username and password.

The first time you log in, you're taken to a list of sample reports in your Titan Reports Appraisal Desktop. You can get back to this screen by clicking the **Reports** tab on the upper right.

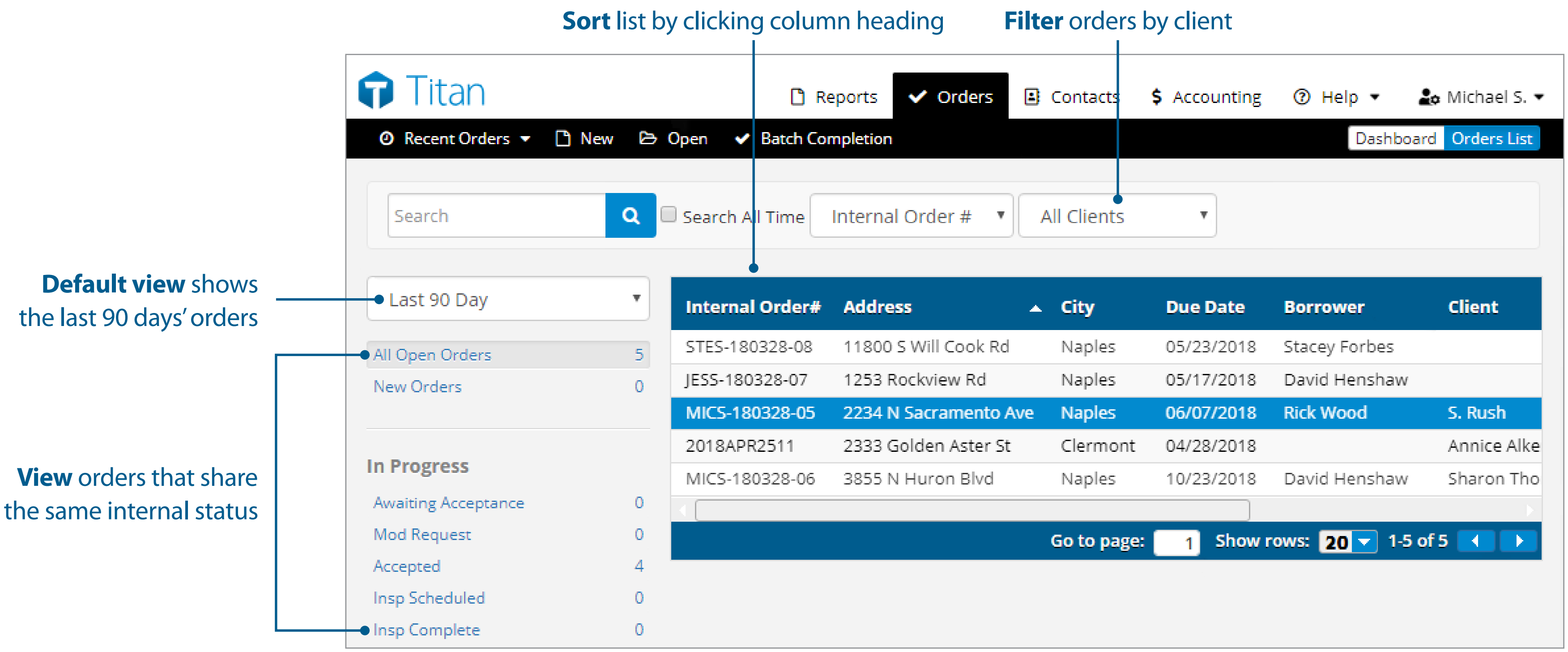


The other tabs across the top — Orders, Contacts, Accounting, Help, and User Settings — contain actions related to Titan Office. In this guide, we'll focus primarily on the **Orders** tab.

The orders grid

You can access all of your orders at any time through the **Orders** tab of Titan Office. Simply click **Orders** on the upper right.

To view the details for a specific order, or to take action on it, double-click it. Or, select it and click **Open** in the toolbar on the upper left.



Create an order

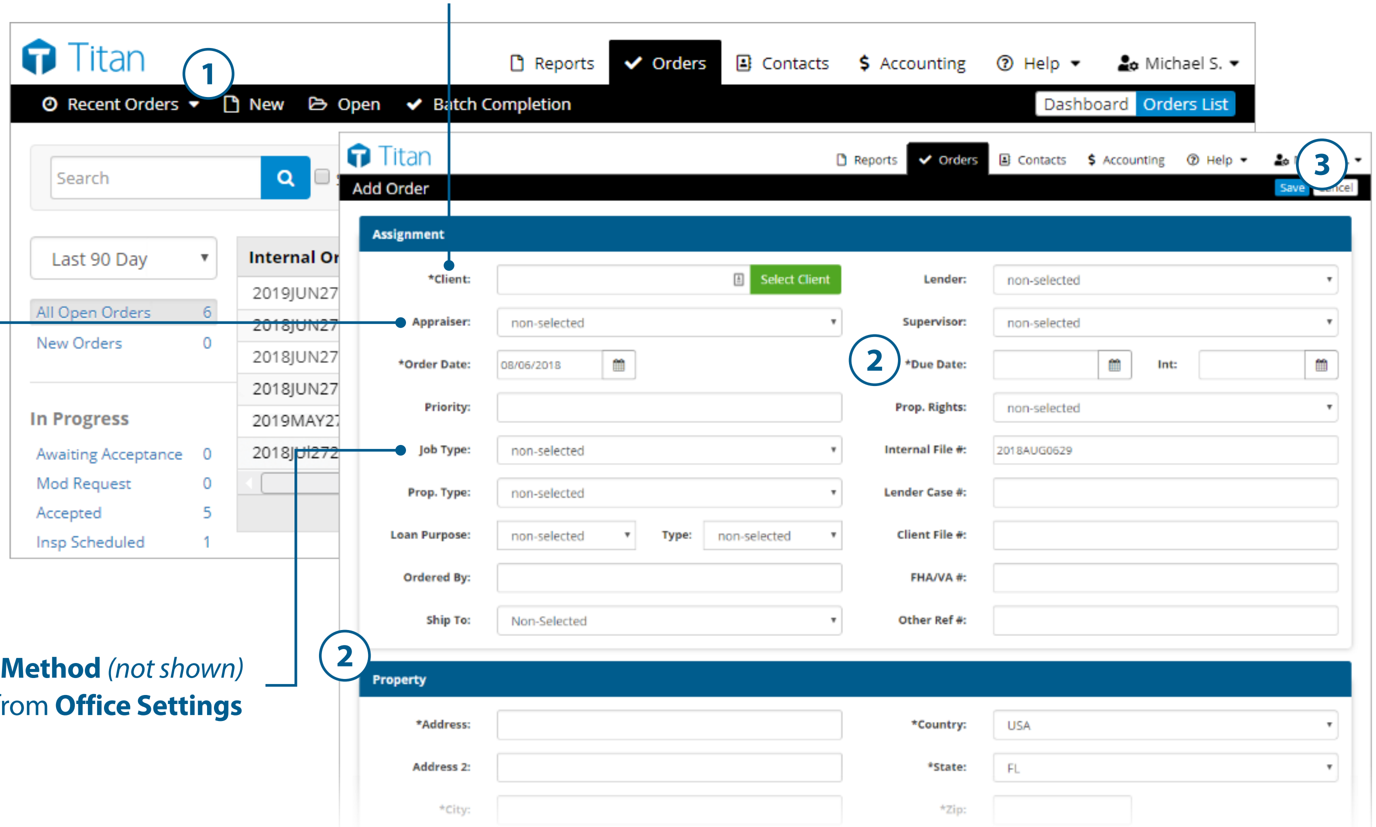
To reduce the amount of manual data entry, make sure you've completed the initial setup of Titan Office before you create an order. For details, visit https://help.alamode.com/TitanOffice/Setup.pdf

To create a new order in Titan Office:

1. From the Orders tab, click **New** in the toolbar on the upper left.
2. At minimum, enter the **Property** details — including the street address, city, state, country, and ZIP — and the **Due Date.**
3. When you're finished, click **Save.**

Manually type client's name or click **Select Client** to choose from your Contacts database

Drop-downs for Appraiser, Supervisor, and Lender are pulled from your **Contacts database**



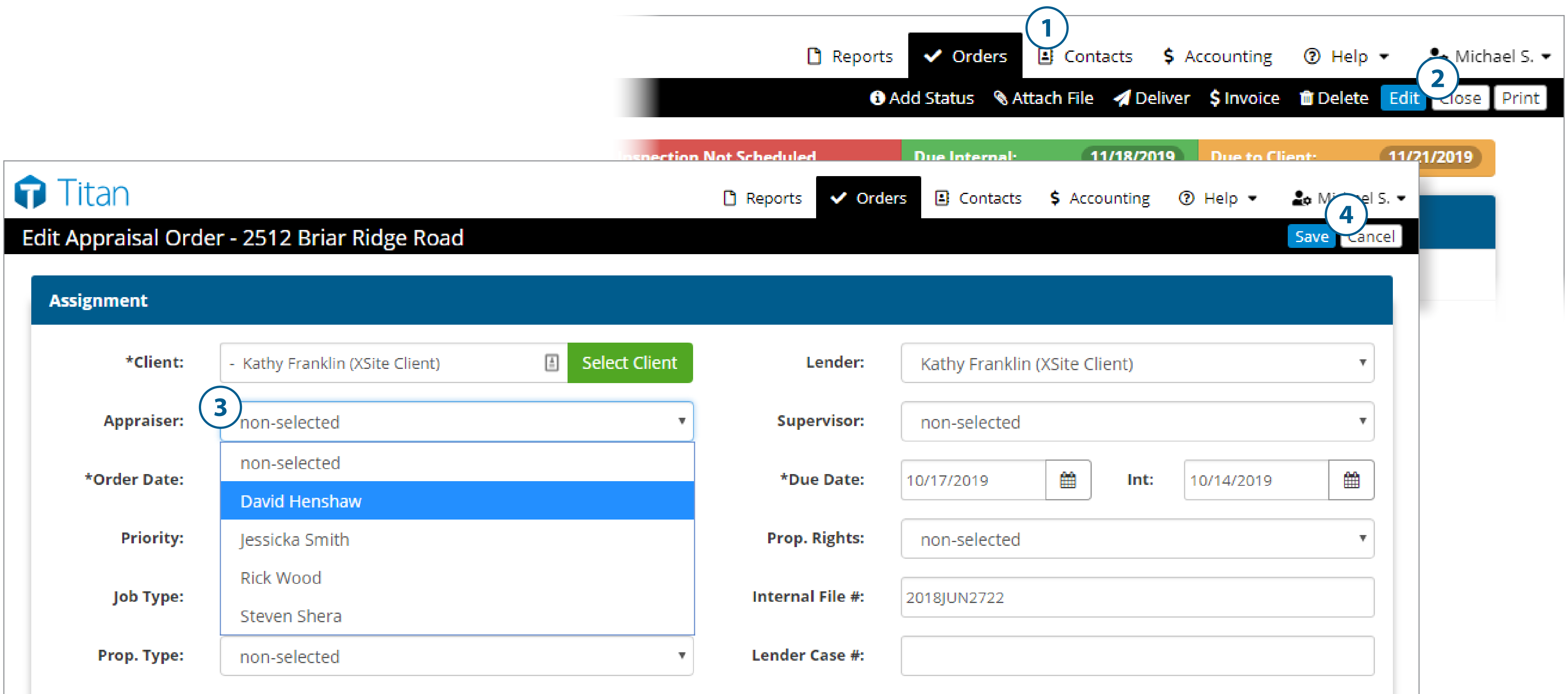
Job Type and **Payment Method** *(not shown)* elections are pulled from **Office Settings**

Assign an order

Once you've created an order, the next step is to assign it to an appraiser so that they can begin working on it.

To assign an order:

1. From the **Orders** tab, find the order you want to assign and double-click it to view the order details.
2. Click **Edit** on the upper right.
3. Select the assignee from the **Appraiser** drop-down menu.
4. When you're finished, click **Save.**

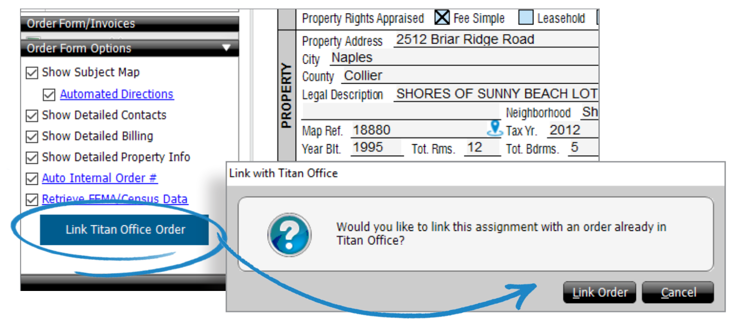


Link a TOTAL report with an order

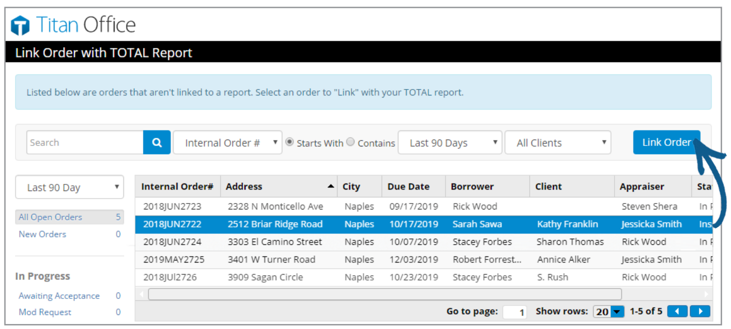
Linking TOTAL reports to Titan Office orders allows you to keep your order information up-to-date and allows changes to flow between TOTAL and the Order in Titan Office.

To link a TOTAL report with an order in Titan Office:

1. From TOTAL's Appraisal Desktop, open the report you want to link with your Titan Office Order and go to the **Assignment PowerView.**
2. Click the **Link Titan Office Order** button in the list of **Order Form Options** on the lower left. Then, click **Link Order** to confirm and view your list of orders.



3. Choose the order from the list and click **Link Order** on the upper right.
4. When you receive the notification that the report was successfully linked to the order, click **OK** to return to your report in TOTAL.

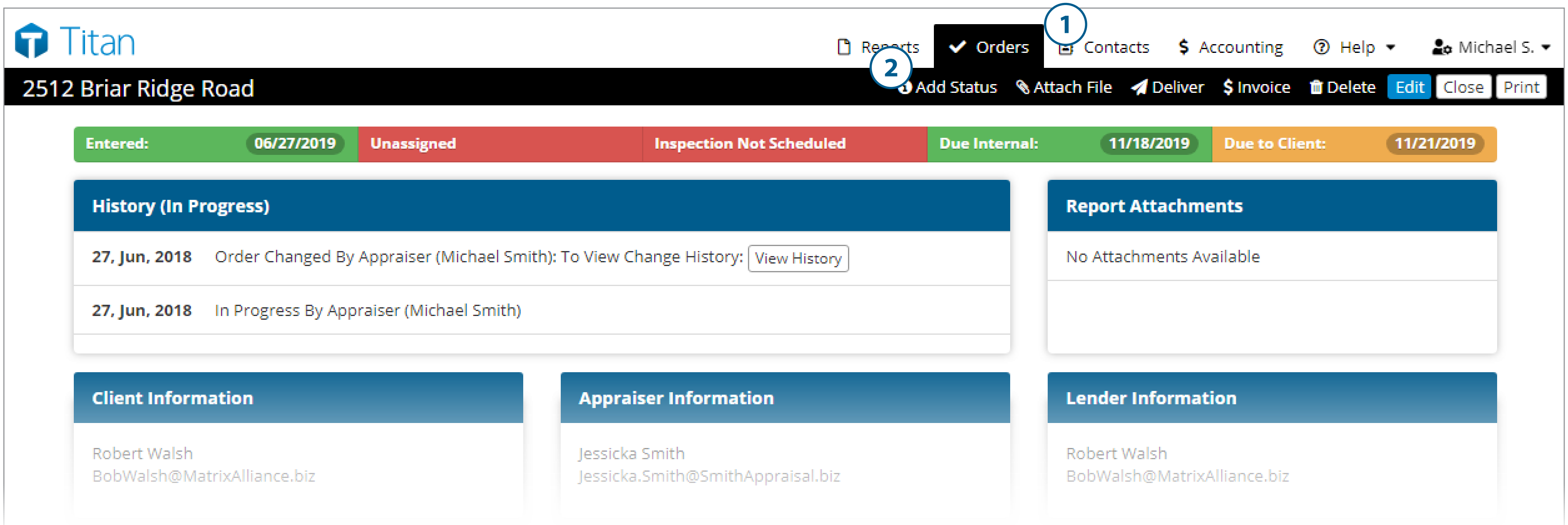


Once the report is linked to a Titan Office order, click **Titan Office Order Details** in the list of **Order Form Options** to quickly access the Order Details and review information or update the order status. You can also unlink the order at any time from TOTAL's Assignment PowerView— just click the **Unlink Titan Office Order** link that appears below the order details button.

Set order status

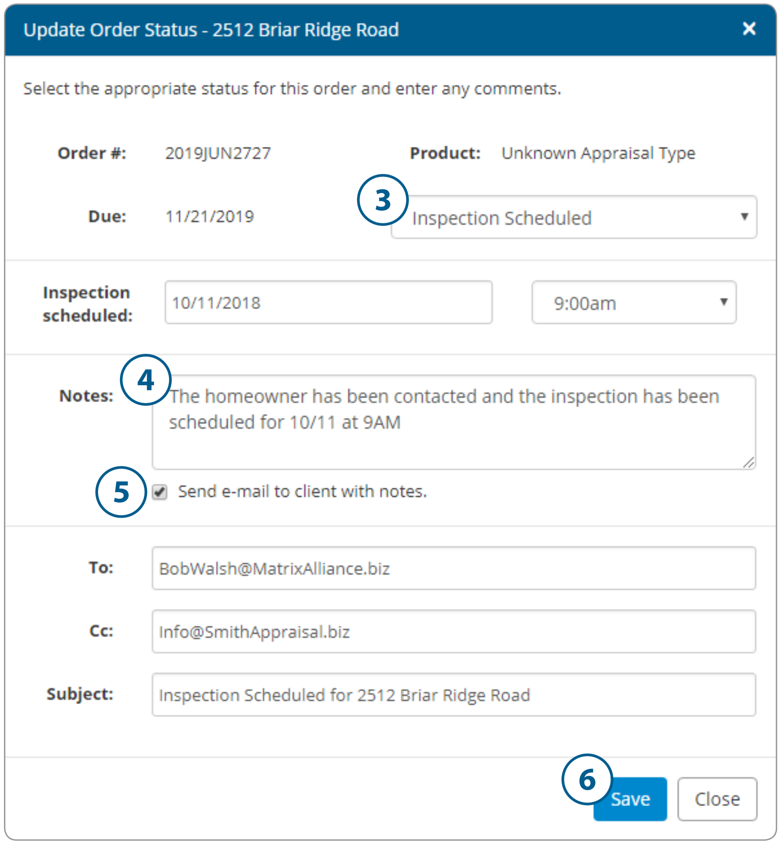
As you continue to work on an order, changing the internal status helps to keep track of your progress. At any time, you can go back and change the status of an order by simply clicking **Add Status** in the order details screen.

1. From the Orders tab, find and double-click your order.
2. When the order details appear, click **Add Status** in the top toolbar.



Set order status (continued)

3. Choose the appropriate status from the **drop-down menu.**
    - If you choose **Inspection Scheduled,** additional fields appear for you to specify the date and time of the inspection.
    - If you set the status to **Completed**, click **Choose File** next to the type of file you're uploading. Then locate the file, select it, and click **Open.** Repeat this for any additional files (based on your client's requirements).
4. If you wish to include any notes with the change in status, type them in the **Notes** field.
5. If you want to send a notification to the client(s) informing them about the status change, check the **Send e-mail to client with notes** box. Then, enter the recipient information and a subject in the fields that appear.
6. When you're finished, click **Save** to update the internal status of the order and send any necessary updates to the client(s).



Access the invoice

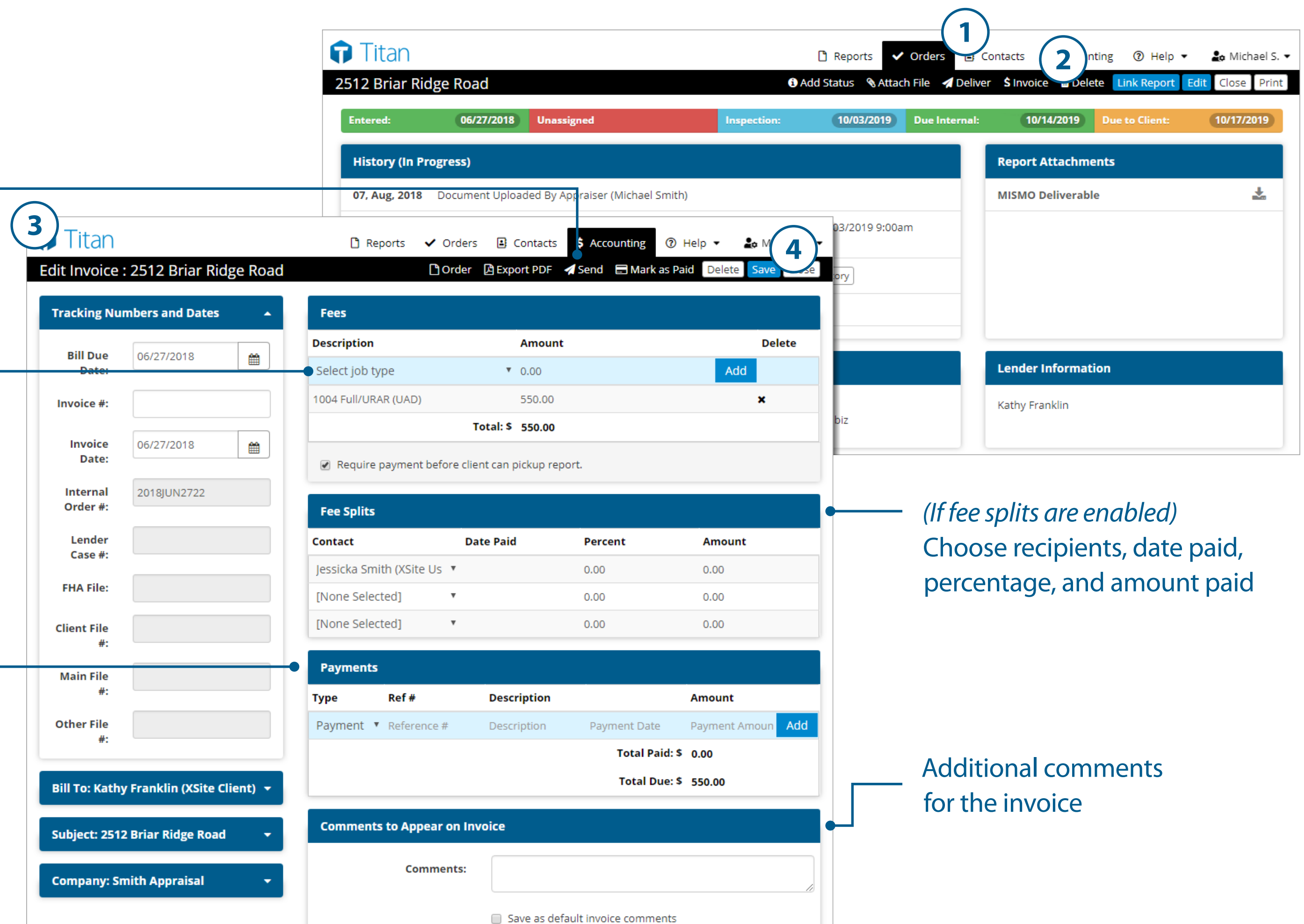
To access the invoice for an order:

1. From the **Orders** section of Titan Office, double-click any order to view the order details.
2. At the top of the order details, click **Invoice.**
3. Add information to your invoice by typing the new information in the appropriate field, or select it from a drop-down menu.
4. When you're finished, click **Save** on the upper right.

Send email to client with PDF copy of invoice attached

Add additional line item charge(s) by selecting the fee description from drop-down menu

Enter **payments** received



(If fee splits are enabled)
Choose recipients, date paid, percentage, and amount paid

Additional comments for the invoice