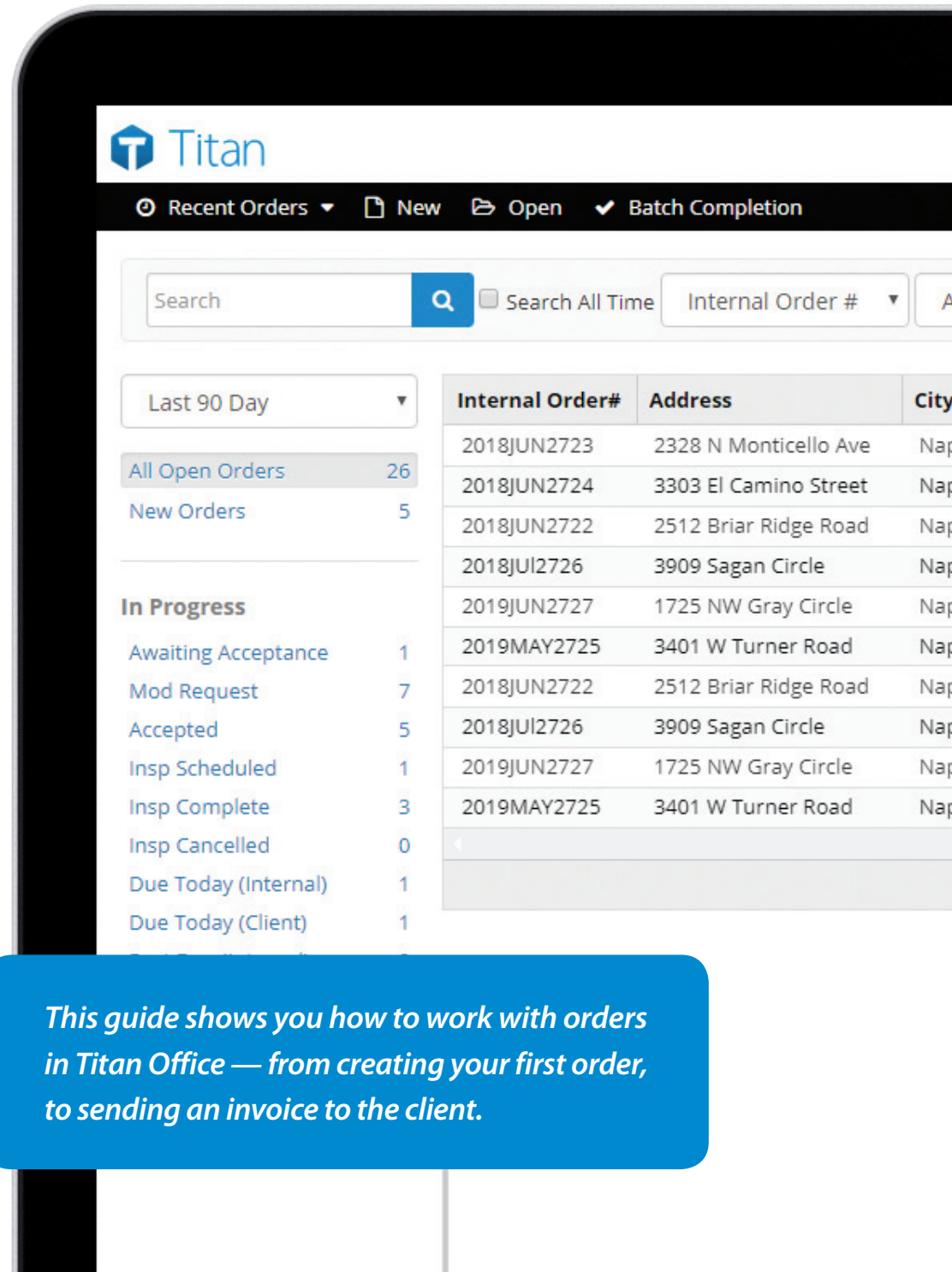


Titan Office

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.

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.

Reports

Orders

Contacts

Accounting

Help

Michael S.

Move/Copy

Rename

Delete

Deliver

Export

File Versions

Search

Q

Current View

Advanced

Last 12 months

File No.	Borrower Name	Report Description	City	State	Appraised Value	Inspection Date	Major Form	Fee Total	Last L
		1004 [Template]					URAR		
		1004 UAD [Template]					URAR [UAD...		
		2055 Exterior-Only [Template]					Exterior-O...		
		2055 Exterior-Only UAD [Template]					Exterior-O...		
		Condo UAD [Template]					Condo [UA...		
		Desk Review [Template]					Residential...		
		Small Income [Template]					Small Inco...		

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.

Sort list by clicking column heading **Filter** orders by client

The screenshot shows the Titan Office interface. At the top, there's a navigation bar with tabs: Reports, Orders (selected), Contacts, Accounting, and Help. Below this is a toolbar with buttons: Recent Orders, New, Open, and Batch Completion. On the right of the toolbar are links for Dashboard and Orders List. A search bar is present with a search icon and a checkbox for 'Search All Time'. To the right of the search bar are dropdown menus for 'Internal Order #' and 'All Clients'. On the left side, there's a sidebar with a 'Last 90 Day' dropdown and a list of filters: 'All Open Orders' (5), 'New Orders' (0), and 'In Progress' (which includes 'Awaiting Acceptance' (0), 'Mod Request' (0), 'Accepted' (4), 'Insp Scheduled' (0), and 'Insp Complete' (0)). The main area displays a table of orders with columns: Internal Order#, Address, City, Due Date, Borrower, and Client. The table contains five rows of data. At the bottom right, there's a pagination control showing 'Go to page: 1' and 'Show rows: 20' (with a dropdown arrow) and '1-5 of 5' with navigation arrows.

Default view shows the last 90 days' orders

View orders that share the same internal status

Internal Order#	Address	City	Due Date	Borrower	Client
STES-180328-08	11800 S Will Cook Rd	Naples	05/23/2018	Stacey Forbes	
JESS-180328-07	1253 Rockview Rd	Naples	05/17/2018	David Henshaw	
MICS-180328-05	2234 N Sacramento Ave	Naples	06/07/2018	Rick Wood	S. Rush
2018APR2511	2333 Golden Aster St	Clermont	04/28/2018		Annice Alke
MICS-180328-06	3855 N Huron Blvd	Naples	10/23/2018	David Henshaw	Sharon Tho

Go to page: 1 Show rows: 20 1-5 of 5

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**

The screenshot shows the 'Add Order' form in Titan Office. The form is divided into several sections: 'Assignment', 'Property', and 'Internal Orders'. The 'Assignment' section includes fields for *Client (with a 'Select Client' button), Lender, Appraiser, Supervisor, *Order Date, Priority, Job Type, Prop. Type, Loan Purpose, Type, Ordered By, Ship To, *Due Date, Int, Prop. Rights, Internal File #, Lender Case #, Client File #, FHA/VA #, and Other Ref #. The 'Property' section includes fields for *Address, Address 2, *City, *Country, *State, and *Zip. The 'Internal Orders' section on the left shows a list of orders with columns for date and status. Annotations with numbered circles point to specific elements: circle 1 points to the 'New' button in the top toolbar; circle 2 points to the 'Select Client' button and the 'Due Date' field; circle 3 points to the 'Save' button in the top right corner.

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**.

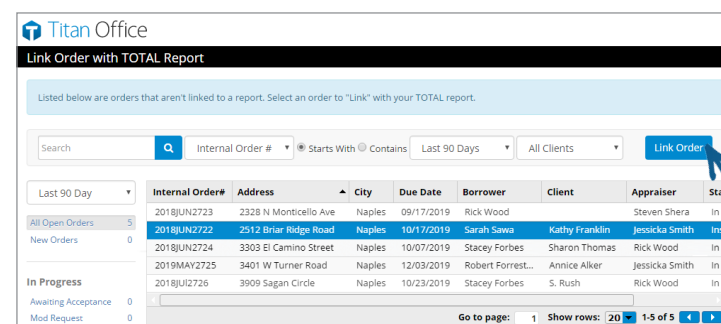
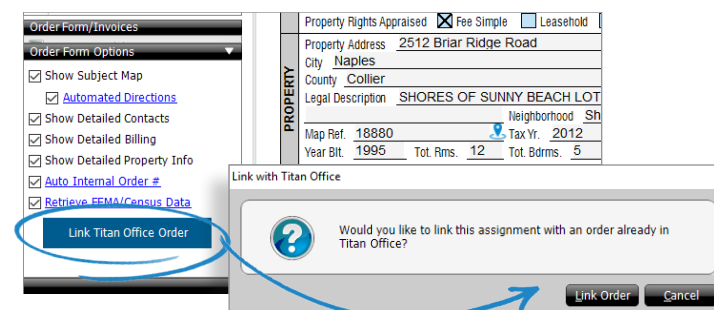
The screenshot displays the Titan Office interface for editing an appraisal order. The top navigation bar includes 'Reports', 'Orders' (selected), 'Contacts', 'Accounting', and 'Help'. Below the navigation bar are buttons for 'Add Status', 'Attach File', 'Deliver', 'Invoice', 'Delete', 'Edit' (circled with a blue '2'), 'Close', and 'Print'. The main content area is titled 'Edit Appraisal Order - 2512 Briar Ridge Road'. It features a table with columns for 'Inspection Not Scheduled', 'Due Internal' (11/18/2019), and 'Due to Client' (11/21/2019). The 'Assignment' section contains fields for 'Client', 'Appraiser', 'Order Date', 'Priority', 'Job Type', 'Prop. Type', 'Lender', 'Supervisor', 'Due Date', 'Int.', 'Prop. Rights', 'Internal File #', and 'Lender Case #'. The 'Appraiser' dropdown menu is open, showing a list of names: 'non-selected', 'non-selected', 'David Henshaw' (highlighted with a blue bar and circled with a blue '3'), 'Jessicka Smith', 'Rick Wood', and 'Steven Shera'. The 'Save' button is circled with a blue '4'.

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.

Titan

2512 Briar Ridge Road

Reports Orders Contacts Accounting Help Michael S.

Add Status Attach File Deliver Invoice Delete Edit Close Print

Entered: 06/27/2019 Unassigned Inspection Not Scheduled Due Internal: 11/18/2019 Due to Client: 11/21/2019

History (In Progress)

27, Jun, 2018 Order Changed By Appraiser (Michael Smith): To View Change History: [View History](#)

27, Jun, 2018 In Progress By Appraiser (Michael Smith)

Report Attachments

No Attachments Available

Client Information

Robert Walsh
BobWalsh@MatrixAlliance.biz

Appraiser Information

Jessicka Smith
Jessicka.Smith@SmithAppraisal.biz

Lender Information

Robert Walsh
BobWalsh@MatrixAlliance.biz

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).

Update Order Status - 2512 Briar Ridge Road

Select the appropriate status for this order and enter any comments.

Order #: 2019JUN2727 Product: Unknown Appraisal Type

Due: 11/21/2019 **3** Inspection Scheduled

Inspection scheduled: 10/11/2018 9:00am

Notes: **4** The homeowner has been contacted and the inspection has been scheduled for 10/11 at 9AM

5 ☒ Send e-mail to client with notes.

To: BobWalsh@MatrixAlliance.biz

Cc: Info@SmithAppraisal.biz

Subject: Inspection Scheduled for 2512 Briar Ridge Road

6 Save Close

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

The screenshot shows the 'Edit Invoice' page for order 2512 Briar Ridge Road. The interface includes a top navigation bar with 'Orders' selected. A sidebar on the left contains fields for 'Tracking Numbers and Dates', 'Invoice #', 'Invoice Date', 'Internal Order #', 'Lender Case #', 'FHA File', 'Client File #', 'Main File #', and 'Other File #'. The main content area is divided into several sections: 'Fees' (with a table for Description, Amount, and Delete), 'Fee Splits' (with a table for Contact, Date Paid, Percent, and Amount), 'Payments' (with a table for Type, Ref #, Description, Amount, and Add), and 'Comments to Appear on Invoice' (with a text area for Comments). A right sidebar contains 'Report Attachments' and 'Lender Information'. Numbered callouts indicate: 1. 'Orders' in the top navigation bar; 2. 'Invoice' button in the top right; 3. 'Fees' section in the main content area; 4. 'Save' button in the top right.

Description	Amount	Delete
Select job type	0.00	Add
1004 Full/URAR (UAD)	550.00	X
Total:	\$ 550.00	

Contact	Date Paid	Percent	Amount
Jessicka Smith (XSite Us)		0.00	0.00
[None Selected]		0.00	0.00
[None Selected]		0.00	0.00

Type	Ref #	Description	Amount
Payment	Reference #	Description	Payment Date
		Payment Amount	Add
Total Paid:			\$ 0.00
Total Due:			\$ 550.00

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

Additional comments for the invoice