# Titan Office
## Setup QuickStart Guide

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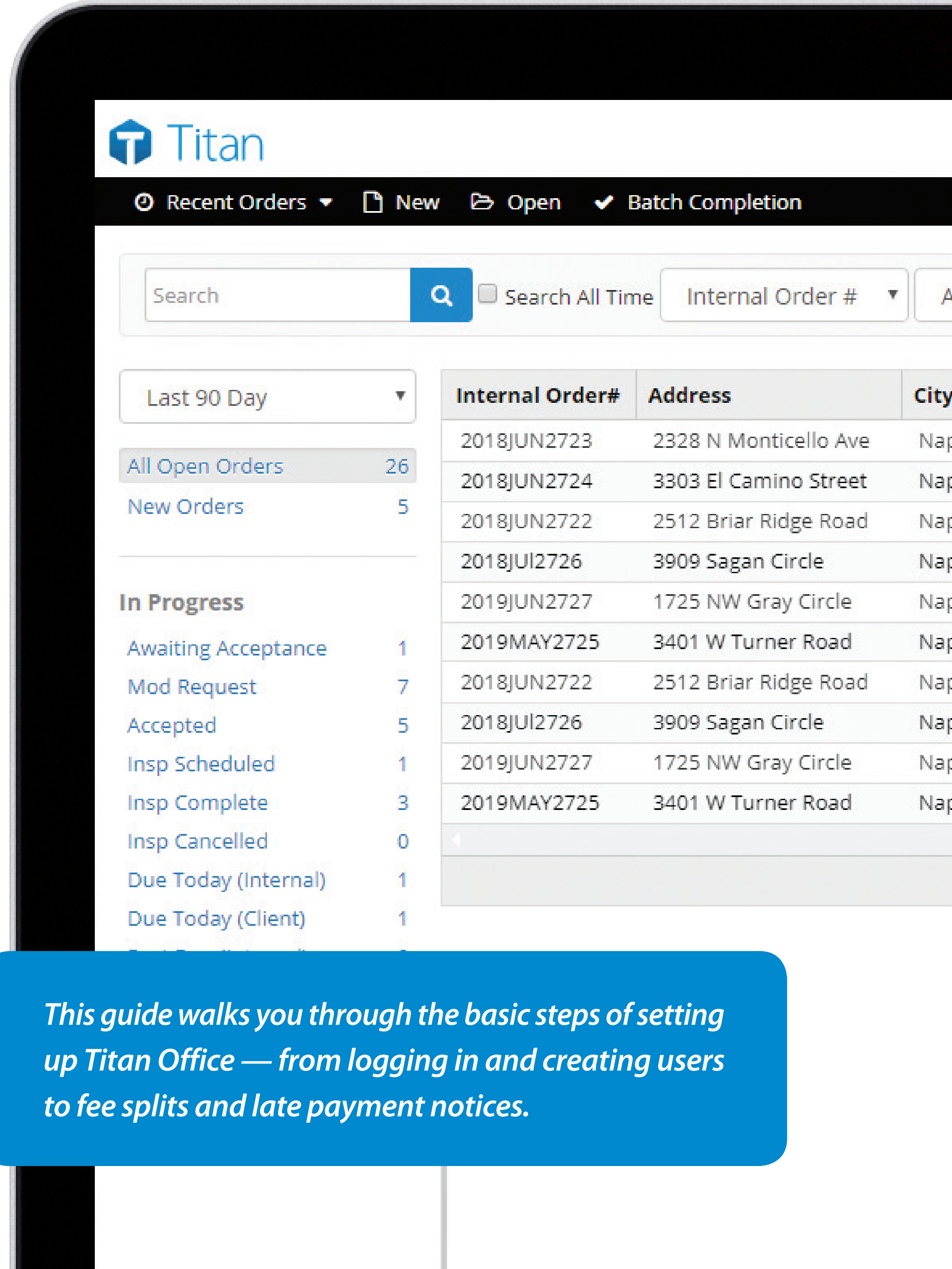


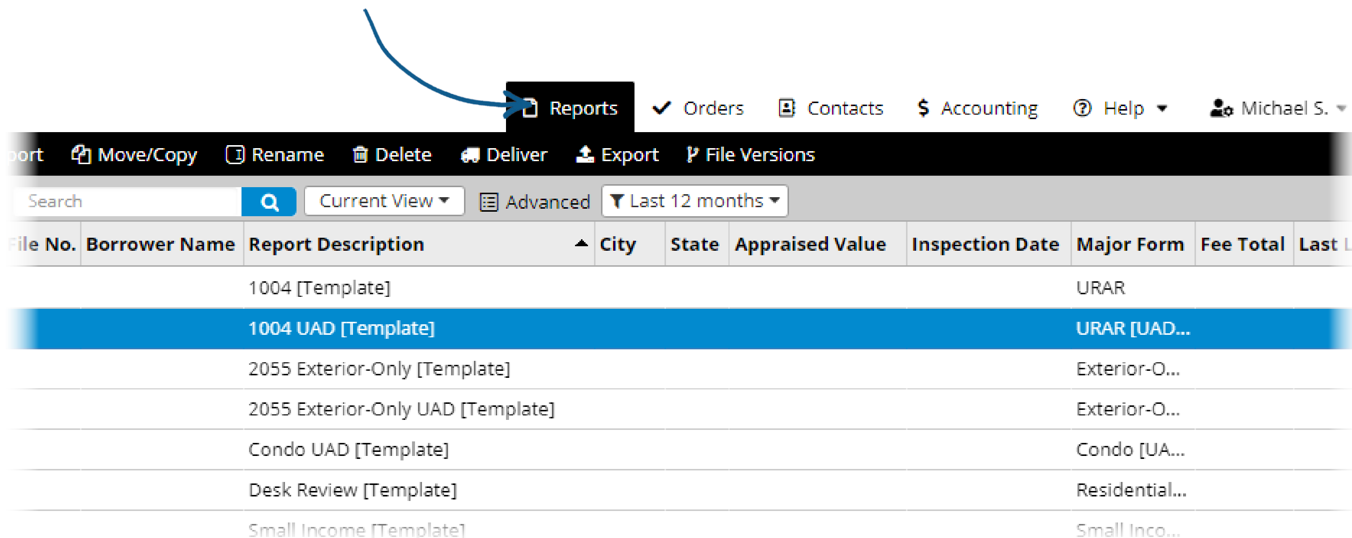

*This guide walks you through the basic steps of setting up Titan Office — from logging in and creating users to fee splits and late payment notices.*

# 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, and we'll touch on each one in this guide.

# Create users

Similar to User Management in XSites, Titan Office gives you complete control over who has access to the back-end administrative tools, and lets you build profiles for your staff directory.

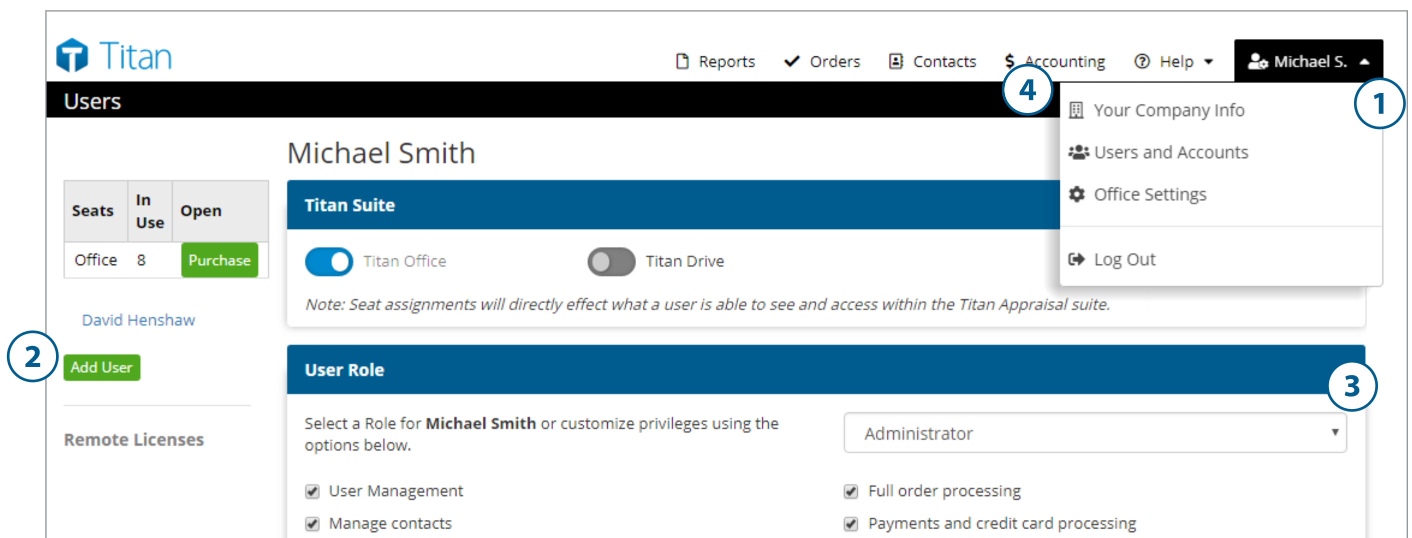
By default, Titan Office comes with one seat which is automatically assigned to the administrator. You can buy additional seats for users such as staff appraisers and office managers by clicking the **Purchase** button. (*A user must have a seat assigned to them before they can log in and use Titan Office features.)*

*The "Home" section at the bottom of the user creation screen lets you choose which page loads by default when the user logs in.*

**To create a new user:**

1. Hover over the **User Settings** menu on the upper right and select **Users and Accounts.**
2. Click **Add User** on the left.
3. Choose a role from the dropdown, or simply assign privileges with the check boxes. Fill out the user's details. At a minimum, complete the **Name & Title** and **Email & Security** sections. To assign a seat to the user, toggle the switch next to **Titan Office** in the **Titan Suite** section.
4. When you're finished, click **Save** at the top.

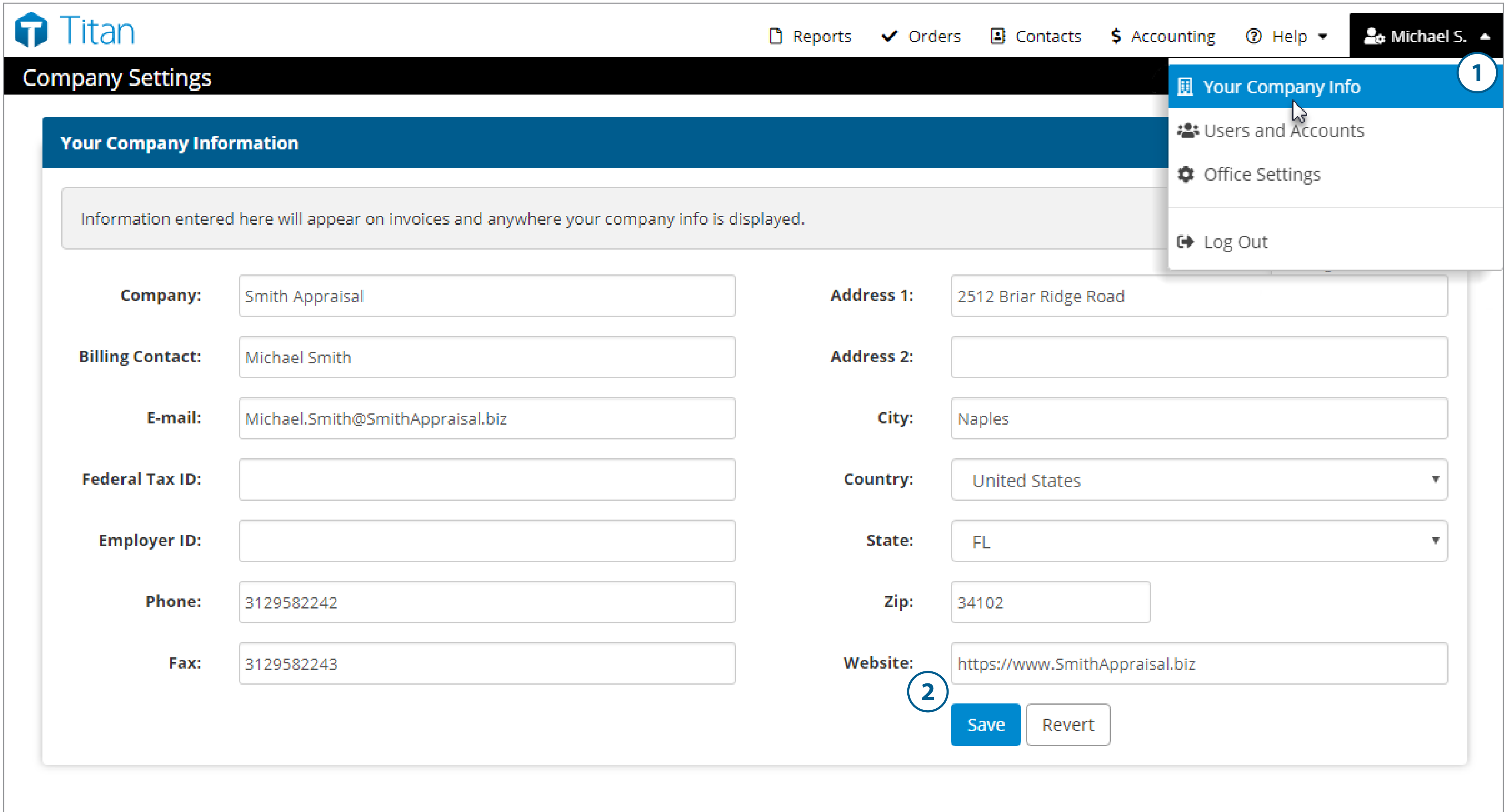
*Selecting a role from the dropdown automatically selects the most common privileges associated with that role. See the end of this guide for more info.*



# Your Company Info

One of the first things you'll want to edit in the **User Settings** menu is **Your Company Info.** This ensures all of your invoices display accurate contact details.

1. To access it, hover over the **User Settings** menu in the main toolbar and select **Your Company Info.** Then, simply edit your details as needed.
2. Click **Save** at the bottom of the page when you're finished.



# Job types

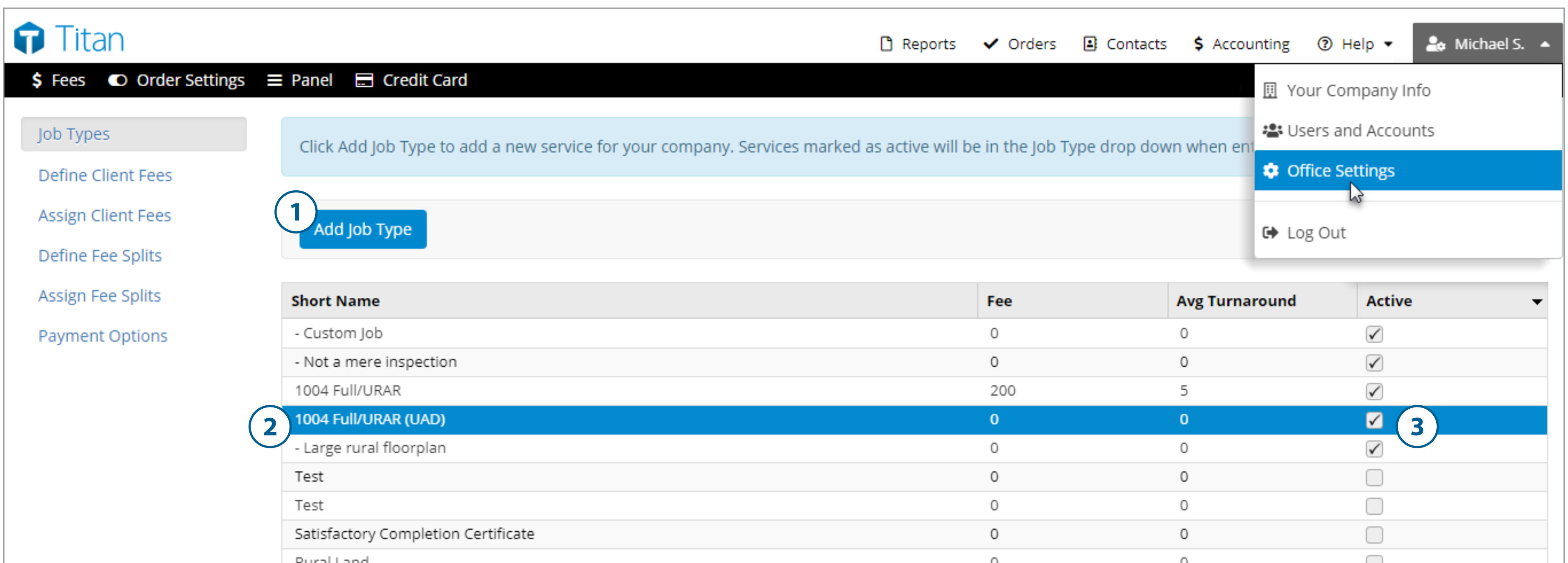
*If you've already set up your fees in XSites Business Management, those settings are imported into Titan Office automatically.*

Think of your Office Settings in Titan Office as your hub for all things "getting paid." To access it, hover over the **User Settings** menu on the upper right and select **Office Settings** from the drop-down menu.

The first screen is Job Types. This is where you edit basic details about the services you offer.

**To add or edit a job type:**

1. Click **Add Job Type** at the top to add a new job if yours isn't listed.
2. Double-click on a job to edit its default fee and turn time. Leave the checkboxes unchecked in the **Add/Edit Product** window if you want this job type to only be visible internally.
3. If you plan on creating orders with a specific job type, mark the **Active** checkbox. *(This is marked automatically if you enter a default fee and turn time.)*
4. When you're finished creating or editing a Job Type, click **Save** *(not pictured)*.

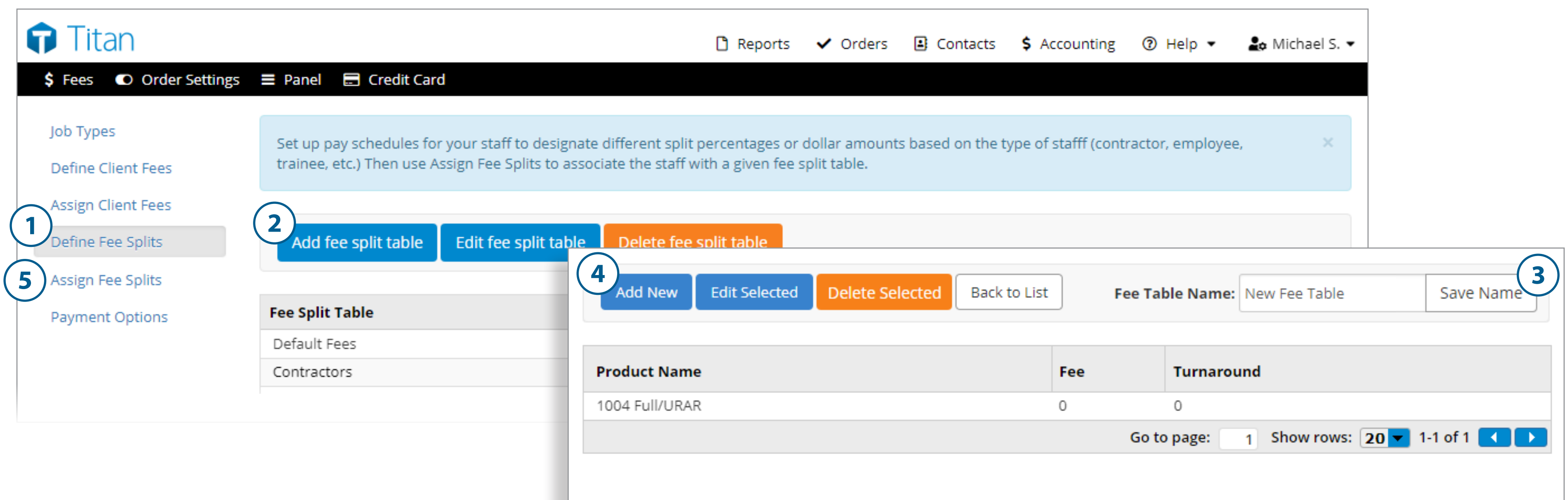


# Fee splits

You might want to set up pay schedules for your staff depending on what type of employee they are — contractor, trainee, etc.

First you'll define fees for your staff. Then you'll assign them. To begin:

1. Select **Define Fee Splits** from within your **Office Settings**.
2. Click **Add fee split table** to create a new fee structure.
3. On the next screen, in the box on the upper right, name your table and click **Save Name.**
4. Click **Add New** to add a job type to your fee table. The products listed in the pop-up are the jobs you've marked as "active" under **Job Types** on the left
5. When you're finished creating or editing a fee table, click **Save** *(not pictured)*. To assign a fee split table to a staff member, go to the **Assign Fee Splits** section on the left and select the **Fee Table** from the drop-down menu to the right of their name.

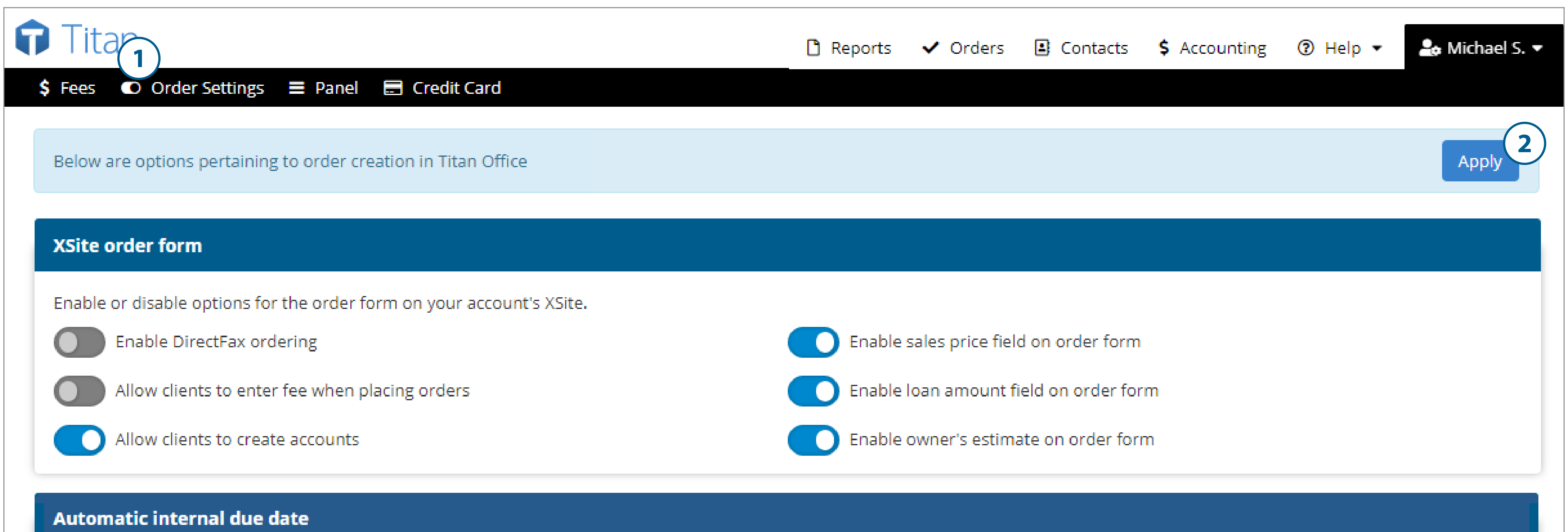


# Order settings

Titan Office lets you set custom preferences for everything from due dates to file numbering.

**To access your order options:**

1. Click **Order Settings** in the top toolbar on the upper left from within your **Office Settings**. From here, you can:
   - Enable and disable options for your XSite's order form.
   - Choose how you want Titan Office to automatically create internal order numbers — sequentially, or with custom settings using a prefix, month, day, year, and/or digit sequence. *(A preview of the custom file number is shown on the lower right of this section.)*
   - Choose which notifications you want to receive.
   - Adjust automatic internal due date, invoice creation, and order sorting/display settings.
2. When you're finished, click **Apply** on the upper right.



# Create contacts

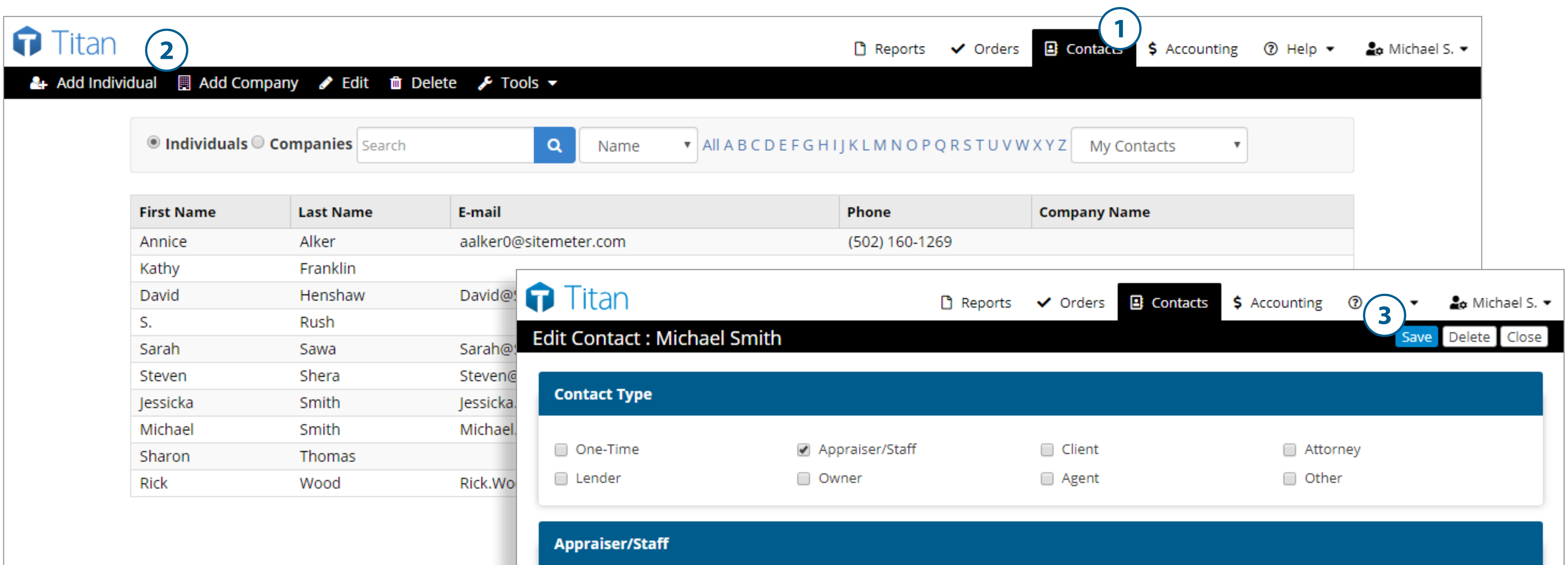
*Use the Individuals and Companies radio buttons to toggle your view. When Individuals is selected, you won't be able to see Companies, and vice versa.*

Titan Office comes with a built-in contact manager that lets you add, edit, and delete contacts, or even import contacts from a spreadsheet.

**To create a new contact:**

1. Click Contacts on the upper right.
2. Click **Add Individual** or **Add Company** and fill out the details. At minimum, select at least one contact type and:
    - For individual contacts, enter the contact's first name, last name, and phone number.
    - For company contacts, enter the company name, email address, and phone number

    Then, fill out any additional details as needed.
3. When you're finished, click **Save** at the top.



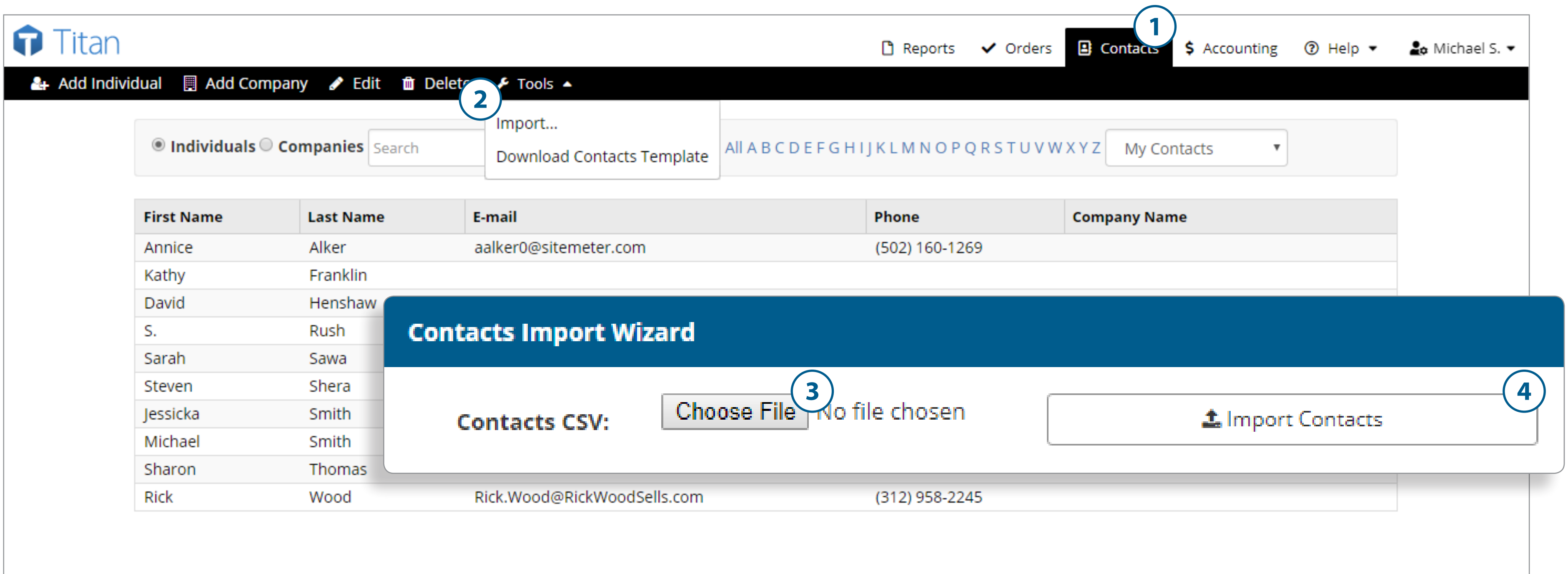
# Import contacts

*The following guide explains which headers must be in your CSV file:* *https://help.alamode.com/7209*

Importing contacts from your existing contact manager or email program saves you from having to create contacts manually. To use our contact import tool, you must first export your contacts from your local contact management system as a CSV file.

Visit the resource on the left to learn what should be included in your CSV file. Once it's formatted correctly, you can import the file directly into Titan Office.

1. Click **Contacts** in the top toolbar.
2. Then, click **Tools** and select **Import** from the drop-down menu.
3. Click **Choose File.** In the window that appears, browse for your contacts CSV file, select it, and click **Open.**
4. Click **Import Contacts** to import and add them to your contacts database.

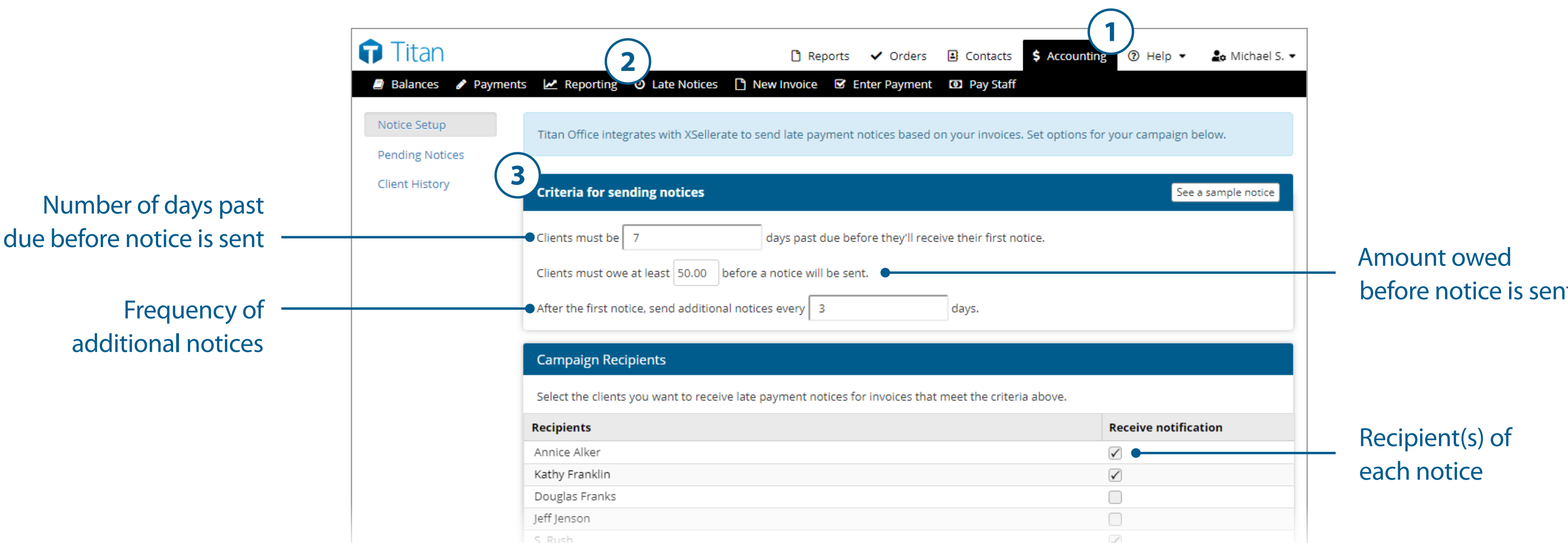


# Late payment notices

The Accounting tab lets you view invoices, access reporting tools, and pay staff, etc.

When you first set up Titan Office, you'll want to set up late payment notifications. When there's an invoice with an outstanding balance past the due date, a notice will be sent to your clients automatically after a specified amount of time.

1. Click **Accounting** on the upper right.
2. Then, click **Late Notices** in the toolbar.
3. Enter the **Criteria for sending notices.**
4. Choose the staff member(s) you want to receive an alert before any late notices are sent in the **Campaign Notification** section *(not shown)*.
5. When you're finished, click **Save Settings** on the lower left *(not shown)*.



# User and account privileges

Not sure how to assign privileges under your **Users and Accounts** settings? Here's a cheat sheet of all your options.

- **User Management:** Can view, edit, and create new users
- **Manage contacts and panel:** Access to individual and company contacts from the **Contacts** tab and from within order creation
- **Accounting and order management:**
  - Can view and edit all orders
  - Full access to the Accounting tab
- **Full order processing:**
  - Can view all orders
  - Can edit, delete, complete, and deliver orders
  - Cannot access the Accounting tab
- **Payments and credit card processing:** Can enter employee and client payments within the **Accounting** tab
- **Appraisal order assignee:**
  - Can only see orders assigned to them
  - Cannot edit, delete, complete, or deliver orders
  - Cannot access the Accounting tab