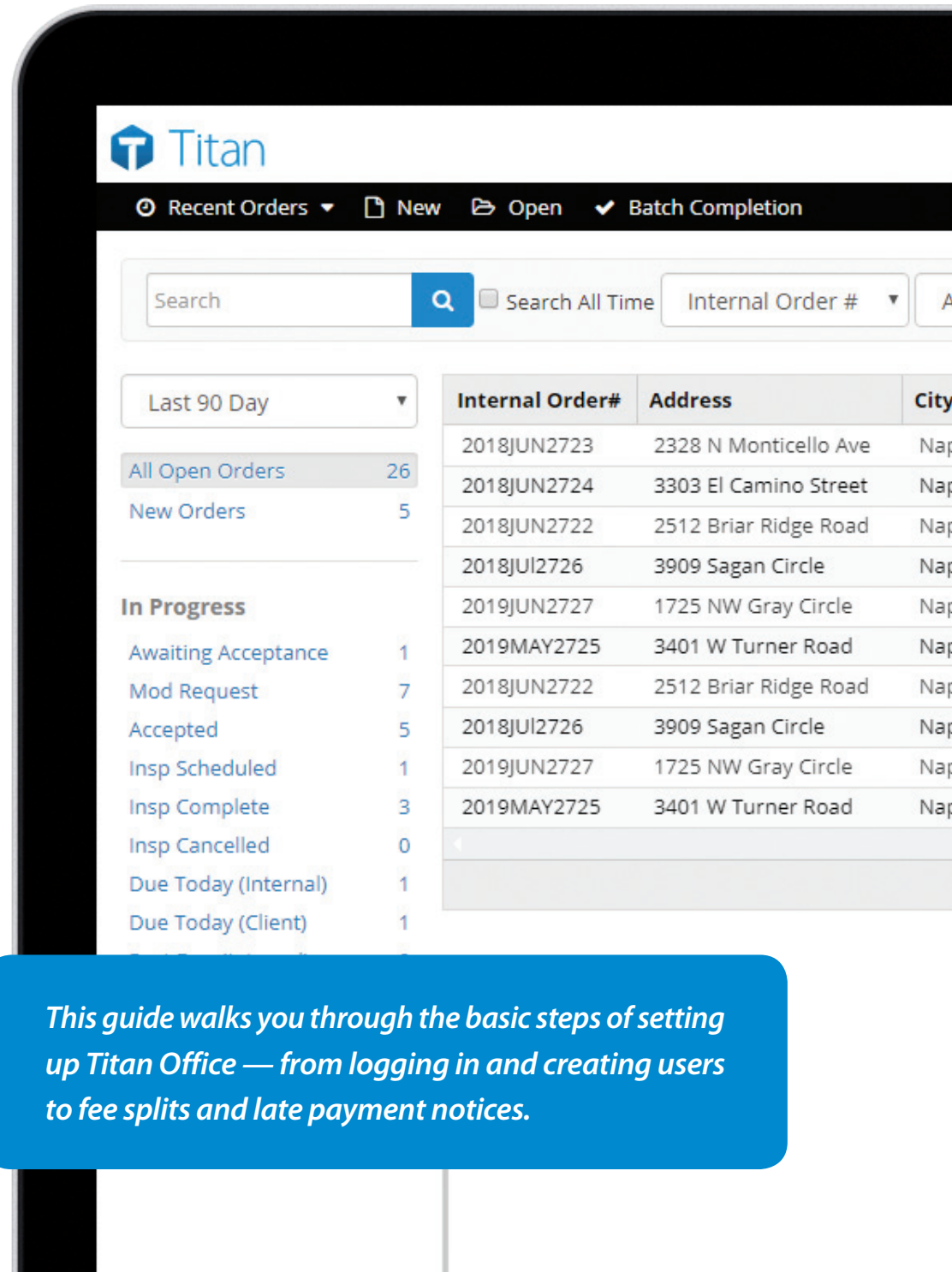


# Titan Office

## 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.*



# Create users

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

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.

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.)

## 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.

The screenshot shows the Titan Office web interface. At the top, there's a navigation bar with links for Reports, Orders, Contacts, Accounting, and Help. A user profile for Michael S. is visible in the top right. Below the navigation bar, the 'Users' section is active. On the left, there's a sidebar with a table showing 'Seats' (Office, 8) and an 'Add User' button. The main content area is titled 'Michael Smith' and contains two sections: 'Titan Suite' and 'User Role'. The 'Titan Suite' section has a toggle for 'Titan Office' (which is turned on) and a toggle for 'Titan Drive' (which is turned off). Below this is a note: 'Note: Seat assignments will directly effect what a user is able to see and access within the Titan Appraisal suite.' The 'User Role' section has a dropdown menu set to 'Administrator' and a list of checkboxes for privileges: 'User Management', 'Manage contacts', 'Full order processing', and 'Payments and credit card processing'. Numbered callouts are present: 1 points to the 'Users and Accounts' menu item in the top right; 2 points to the 'Add User' button in the left sidebar; 3 points to the 'Administrator' role dropdown; and 4 points to the 'Titan Office' toggle switch.

# 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.

**Titan** Reports Orders Contacts Accounting Help Michael S.

**Company Settings**

**Your Company Information**

Information entered here will appear on invoices and anywhere your company info is displayed.

<b>Company:</b>	<input type="text" value="Smith Appraisal"/>	<b>Address 1:</b>	<input type="text" value="2512 Briar Ridge Road"/>
<b>Billing Contact:</b>	<input type="text" value="Michael Smith"/>	<b>Address 2:</b>	<input type="text"/>
<b>E-mail:</b>	<input type="text" value="Michael.Smith@SmithAppraisal.biz"/>	<b>City:</b>	<input type="text" value="Naples"/>
<b>Federal Tax ID:</b>	<input type="text"/>	<b>Country:</b>	<input type="text" value="United States"/>
<b>Employer ID:</b>	<input type="text"/>	<b>State:</b>	<input type="text" value="FL"/>
<b>Phone:</b>	<input type="text" value="3129582242"/>	<b>Zip:</b>	<input type="text" value="34102"/>
<b>Fax:</b>	<input type="text" value="3129582243"/>	<b>Website:</b>	<input type="text" value="https://www.SmithAppraisal.biz"/>

**Save** **Revert**

# 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).

The screenshot shows the Titan Office interface. The top navigation bar includes links for Reports, Orders, Contacts, Accounting, and Help. The user's name, Michael S., is displayed in the top right. The sidebar on the left contains links for Fees, Order Settings, Panel, and Credit Card. The main content area is titled 'Job Types' and includes a blue box with the text 'Click Add Job Type to add a new service for your company. Services marked as active will be in the Job Type drop down when en...'. Below this is a table of job types with columns for Short Name, Fee, Avg Turnaround, and Active. The row '1004 Full/URAR (UAD)' is highlighted in blue. A dropdown menu is open on the right, showing options for Your Company Info, Users and Accounts, Office Settings (selected), and Log Out.

Short Name	Fee	Avg Turnaround	Active
- Custom Job	0	0	<input checked="" type="checkbox"/>
- Not a mere inspection	0	0	<input checked="" type="checkbox"/>
1004 Full/URAR	200	5	<input checked="" type="checkbox"/>
1004 Full/URAR (UAD)	0	0	<input checked="" type="checkbox"/>
- Large rural floorplan	0	0	<input checked="" type="checkbox"/>
Test	0	0	<input type="checkbox"/>
Test	0	0	<input type="checkbox"/>
Satisfactory Completion Certificate	0	0	<input type="checkbox"/>
Rural Land	0	0	<input type="checkbox"/>

# 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.

The screenshot displays the Titan Office web application interface. The top navigation bar includes links for Reports, Orders, Contacts, Accounting, Help, and a user profile for Michael S. The sidebar on the left contains navigation options: Fees, Order Settings, Panel, and Credit Card. Under the Fees section, there are sub-options: Job Types, Define Client Fees, Assign Client Fees, Define Fee Splits (highlighted with a blue circle and the number 1), Assign Fee Splits (highlighted with a blue circle and the number 5), and Payment Options. The main content area shows a 'Fee Split Table' section with a table containing 'Default Fees' and 'Contractors'. A modal window titled 'New Fee Table' is open, showing a form to create a new fee table. The modal includes buttons for 'Add New', 'Edit Selected', 'Delete Selected', and 'Back to List'. The 'Fee Table Name' field is set to 'New Fee Table', and the 'Save Name' button is highlighted with a blue circle and the number 3. The modal also displays a table with columns for 'Product Name', 'Fee', and 'Turnaround', showing a single row for '1004 Full/URAR' with a fee of 0 and a turnaround of 0. The bottom of the modal shows pagination controls: 'Go to page: 1', 'Show rows: 20', and '1-1 of 1'.

# 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.

The screenshot shows the Titan Office web application interface. At the top, there is a navigation bar with the Titan logo (a blue 'T' in a hexagon) and the word 'Titan' in blue. To the right of the logo is a circular icon with the number '1'. The navigation bar also includes links for Reports, Orders, Contacts, Accounting, and Help, along with a user profile icon for Michael S. Below the navigation bar is a dark blue toolbar with icons and labels for Fees, Order Settings (highlighted with a circular icon with the number '1'), Panel, and Credit Card. The main content area has a light blue header with the text 'Below are options pertaining to order creation in Titan Office' and an 'Apply' button (highlighted with a circular icon with the number '2'). The main content area is divided into two sections: 'XSite order form' and 'Automatic internal due date'. The 'XSite order form' section contains a heading 'Enable or disable options for the order form on your account's XSite.' and six toggle switches arranged in two columns. The first column has three switches: 'Enable DirectFax ordering' (disabled), 'Allow clients to enter fee when placing orders' (disabled), and 'Allow clients to create accounts' (enabled). The second column has three switches: 'Enable sales price field on order form' (enabled), 'Enable loan amount field on order form' (enabled), and 'Enable owner's estimate on order form' (enabled).

**Order Settings**

Below are options pertaining to order creation in Titan Office

**XSite order form**

Enable or disable options for the order form on your account's XSite.

- ☐ Enable DirectFax ordering
- ☐ Allow clients to enter fee when placing orders
- ☒ Allow clients to create accounts
- ☒ Enable sales price field on order form
- ☒ Enable loan amount field on order form
- ☒ Enable owner's estimate on order form

**Automatic internal due date**

# 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.

The screenshot displays the Titan Office web application interface. The top navigation bar includes links for Reports, Orders, Contacts (highlighted with a circled '1'), Accounting, Help, and a user profile for Michael S. Below the navigation bar, there are buttons for 'Add Individual', 'Add Company', 'Edit', 'Delete', and 'Tools'. The main content area shows a table of contacts with columns for First Name, Last Name, E-mail, Phone, and Company Name. A search bar and a dropdown menu for 'My Contacts' are also present. An 'Edit Contact' modal window is open, showing the 'Contact Type' section with checkboxes for One-Time, Lender, Appraiser/Staff (checked), Owner, Client, Agent, Attorney, and Other. The 'Appraiser/Staff' section is also visible.

First Name	Last Name	E-mail	Phone	Company Name
Annice	Alker	aalker0@sitemeter.com	(502) 160-1269	
Kathy	Franklin			
David	Henshaw	David@		
S.	Rush			
Sarah	Sawa	Sarah@		
Steven	Shera	Steven@		
Jessicka	Smith	Jessicka.		
Michael	Smith	Michael.		
Sharon	Thomas			
Rick	Wood	Rick.Wo		

**Edit Contact : Michael Smith**

**Contact Type**

☐ One-Time
 ☒ Appraiser/Staff
 ☐ Client
 ☐ Attorney

☐ Lender
 ☐ Owner
 ☐ Agent
 ☐ Other

**Appraiser/Staff**



# 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.

The screenshot displays the Titan Office web application. The top navigation bar includes 'Reports', 'Orders', 'Contacts' (1), 'Accounting', 'Help', and a user profile 'Michael S.'. Below this is a secondary toolbar with 'Add Individual', 'Add Company', 'Edit', 'Delete', and 'Tools' (2). The 'Tools' dropdown menu is open, showing 'Import...' and 'Download Contacts Template'. The 'Import...' option is selected, leading to the 'Contacts Import Wizard' modal. This modal has a 'Contacts CSV:' label, a 'Choose File' button (3), and a text field showing 'No file chosen'. To the right of the text field is an 'Import Contacts' button (4). In the background, a table of contacts is visible with columns: First Name, Last Name, E-mail, Phone, and Company Name. The table contains several rows of contact information.

First Name	Last Name	E-mail	Phone	Company Name
Annice	Alker	aalker0@sitemeter.com	(502) 160-1269	
Kathy	Franklin			
David	Henshaw			
S.	Rush			
Sarah	Sawa			
Steven	Shera			
Jessicka	Smith			
Michael	Smith			
Sharon	Thomas			
Rick	Wood	Rick.Wood@RickWoodSells.com	(312) 958-2245	

# 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*).

Number of days past due before notice is sent

Frequency of additional notices

Titan Office integrates with XSellerte to send late payment notices based on your invoices. Set options for your campaign below.

**Criteria for sending notices** [See a sample notice](#)

- Clients must be  days past due before they'll receive their first notice.
- Clients must owe at least  before a notice will be sent.
- After the first notice, send additional notices every  days.

**Campaign Recipients**

Select the clients you want to receive late payment notices for invoices that meet the criteria above.

Recipients	Receive notification
Annice Alker	<input checked="" type="checkbox"/>
Kathy Franklin	<input checked="" type="checkbox"/>
Douglas Franks	<input type="checkbox"/>
Jeff Jenson	<input type="checkbox"/>
S. Rush	<input checked="" type="checkbox"/>

Amount owed before notice is sent

Recipient(s) of each notice

# 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