

TitanAdvisor Quick Reference Guide

1. Current TitanScore
2. Use arrow to see score history and understand changes
3. Customize your plan with up to 4 key areas of focus
4. Get access to the Benchmark Report powered by Titan Intelligence. This report allows you to gain deeper insights, make better business decisions, and optimize for top performance.
5. Track your progress and see how many points and required features are still remaining
6. Edit business goals so TitanAdvisor can recommend features based off your order
7. The event calendar lists events like releases, webinars, live events and training
8. Access different business sections to find relevant TitanAdvisor features
9. Stage the feature is in
10. Shows what parts need to be set up for each specific stage and Business Section. **Note:** These are usually a one-time set up
11. Shows how well users are actually utilizing the features of this Business Section and stage. **Note:** This tracks behaviours
12. Required indicates this is a required feature needed to go to the next stage
13. Indicates a quick win
14. The business goal this feature aligns with
15. Which customer types this feature applies to
16. Which KPIs this feature affects

The screenshot shows the 'Current Plan' dashboard. On the left is a navigation menu with 'Overview' selected. The main content area shows a progress bar at the top, followed by a 'Current Plan' section with four items, each with a 'Required' status and 'In Progress' indicator. A 'Customize Plan' button is visible. To the right, a 'Your TitanScore' card shows a score of 221 and a line chart. Below that, a '56 of 62 Points Earned in Launch' card shows a progress bar. Further down, a '2 Required Features Remaining in Launch' card lists features. At the bottom, there are 'Your Business Goals' and an 'Event Calendar' link.

The screenshot shows the feature page for 'Ensure CSRs click call bubbles to get key insights'. It includes an 'About' section with a '14' callout, a '15' callout for 'All customer types', and a '16' callout for 'KPIs affected: Call Booking Rates'. Below the text is a 'Manual job' card with a 'No Calls to Display' message and a 'Book a manual job' button.

The screenshot shows the 'Job Booking & Dispatching' dashboard. The 'Launch' tab is selected. The 'What To Set Up' section shows a '10' callout for 'Ensure CSRs click call bubbles to get key insights' and a '12' callout for a 'Required' feature. The 'How You're Using Features' section shows a '11' callout for 'Capture email addresses to connect with customers' and a '13' callout for 'Book sold estimates into jobs'.

Ensure CSRs click call bubbles to get key insights Required Job Booking & Dispatching ×

What to set up 1 of 2 Completed

Set up tracking numbers

When you generate tracking numbers, you can assign them to specific marketing campaigns. By using a unique tracking number, you can track the performance of your marketing campaigns. If you've already set up campaigns, select it before saving the number.

Success criteria: Two or more tracking numbers are set.

17

Completed **18**

[Learn More](#)

Set up campaigns

Once your marketing campaigns are set up, you can attach tracking numbers to them. When a customer calls the tracking number, the call and any revenue generated by that call are automatically attributed to the campaign.

Success criteria: You have at least five active marketing campaigns.

Incomplete ⌚ 15 min

[Learn More](#)

Capture email addresses to connect with customers Job Booking & Dispatching ×

(818) 555-1212 ×

Job Notifications

stitan@example.com × +

Job Notifications

[Save](#) [Go back](#)

How to use

Add customer email addresses

Email provides an instantaneous way to keep your customers informed on job details. From the booking screen, you can add email addresses for new customers or you can edit an existing customer or service location record. Technicians can also add email addresses while out in the field.

What we're measuring: Percent of jobs booked in the last 30 days with an email address for the service location or bill-to customer.

19

Over 75% 2 pts.

Over 90% 5 pts.

→ **Current: 0%**
Earning 0 pts.

21

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20

TitanAdvisor ?

Overview

Training

Event Calendar

What's New

BUSINESS SECTIONS

Lead Generation

Job Booking & Dispatching

Customer Communications

Selling & Performing Work

Pricebook

Purchasing & Inventory

Accounting

Payroll & Admin

Overview > Score History

Score History

22 **221** Your TitanScore ✓ Your score is higher than 95% of Titans like you.

23

▼

03/19/2025 - 04/17/2025



Feature 25	Points	What Changed	Date	Section
Set pricing in bulk with the Price Setup Wizard	+4	Usage increased	04/17/2025	Pricebook
Track profitability with job costing	-3	Setup incomplete	04/17/2025	Accounting
Add online payment links to invoices & statements	-2	Usage decreased	04/16/2025	Selling & Performing Work
Increase Revenue with Second Chance Leads	+2	Usage increased	04/16/2025	Job Booking & Dispatching
Send out unpaid invoices	-2	Usage decreased	04/16/2025	Accounting

17. Shows exactly what is being tracked to earn points in TAD

18. Shows current status of the feature and shows total points earned for a given task in TitanAdvisor

19. Partial Points Condition: Shows the threshold required to get partial points. Point amount available listed to the right

20. Full Points Condition: Shows the threshold required to get full points. Point amount available listed to the right

21. Current state and points earned. Shows the current status of that feature and points earned

22. Current TitanScore

23. Customize the date range to look at a history of your score over that period of time

24. TitanScore Trends: This chart shows historical data about the user's TitanScore

25. TitanScore Audit Trail: In this section, users can get a deeper look into why their TitanScore has been going up or down. This will show the feature, points gained or lost, and the corresponding Business Section

For more information on TitanAdvisor, [join our free program](#) [EmberSessions!](#)

