

Service Titan **NATHAN**

Intro to Service Titan

All right, guys, welcome to ServiceTitan. Okay. This is one of the best softwares that you can get for your plumbing business. And in this video, I'm just going to go over some of the basic things that make it so powerful. Okay. And why you want to get it. There's a link in the description down below to go sign up for ServiceTitan. First things first, when you sign up for ServiceTitan, they're going to walk you through how to set up this program. I'm going to have a few videos here on how I use it as well, but they're gonna want you to have three technicians. If you don't have three technicians yet, that's okay. You can still go sign up. Just tell them you have three technicians. And then you're just gonna have to pay them like you have three guys going. Okay? It's totally worth it to do that because the cost of the program versus what the program does for you is still worth it even if you're paying for three guys when you only have one, okay? So let's get into it, okay? You have all these sections up here at the top. We're gonna go over a couple of them. This is the dashboard section where you can see how much revenue you've done per month over the last year. And then if you hover over these, you also get an idea of how much better you're doing than last year. So you can see April 2023, we're up 27% from where we were last year. You can also kind of watch trends. You can see it here in May. Now we've, you know, looks like we had a bump. We were hitting pretty easy and then in May, we usually see a bump, okay? And we've been able to do some refining and growing in here. So now our May has actually hopefully gonna be even better than this one, okay? So this is really important. You can go look at, you know, yesterday's data this week, week to date, last seven days, last quarter, all this good stuff, right? So last quarter you can see, cool. I did 1,200,000.0 in revenue. So I'm on track to hit my goals. You can come down here and see how your technicians are doing. Okay? You can see how much revenue they did. You can see total job average. You can see how many memberships they sold. You can see their productivity, how many billable hours they had, how many billable hours you had as a company. And so you can compare all this to your hourly calculator and you can judge how well you're doing as you as a company in the blink of an eye. Okay? So like I can go look at last week and I can say, okay, did I sell enough hours? Right? A hundred and twenty hours. Did I sell enough hours to hit my goals as a company? Okay. Super, super handy and it's real time data in your hands so that you know how you're doing right away. Okay? So another thing is this call board, which is super cool. A call pops up here. Your CSRs are gonna be able to answer the phone. They're gonna be able to get the customer's information or look up the customer's information, and they're gonna be able to book a job. Okay? And it's gonna put it on the schedule, and then they're gonna be able to put it dispatch a certain technician to it. Okay? The other cool part is, like, right here, you can see sends out a text message to the customer when your technician is on the way. You can also see it gives them a text notification when they book an appointment. It says, hey. We got you booked Friday, May 5 between ten and noon. Right? And then when the technician is on the way, they get another text, text message that says, hey. Your technician Kevin is on the way to this address. Gives them a little bio that you can set up and actually sends them a picture of the technician in the company van so they kinda know what they're expecting before the technician gets there. Customers absolutely love this.

Okay. And then, then you have the dispatch board. Okay. This is where you can see like live real time, what's going on, where your technicians are at, Jobs that are done are gray, ones that are driving to are purple, and the ones they're working on are green. Okay? And then jobs that are unassigned are down here. That's where they live until a technician is ready for another job. They'll take one of these jobs and they'll give it to a technician. Okay? So then the other beauty of this, probably the best part is the price book. So you get to come in here and you get to build your own price book. Okay? And you've already seen what the price book looks like, but basically then you get to build this price book that your technicians see in the field and get to use in the field. Okay? You can build prebuilt options in here. You can go through price setup where service titan will automatically adjust the prices based on your hourly rate. We're gonna go through all that in greater detail in some of these other videos, but just know that it has that capability. And then probably one of the best parts about this is the marketing capabilities. Okay? So I would suggest that everybody gets marketing pro. I think it's like \$900. But you can see just in the last thirty days, marketing pro brought us \$322,000 in revenue just in marketing that we're doing through marketing pro. Okay. And you can see here, like if we go, let's do year to date. I've got a couple campaigns in here that bring me in quite a bit of money. Okay? You can see here this one, \$1,000,000. Actually, that's our main line. Existing customer, we got a campaign that goes out, \$256,000. There's some email campaigns you can run. You can do review generation. You can get your review requests so you can actually ask text some messages to get reviews on Google. It's a super powerful thing. Totally worth the \$900. So go do it. Okay. So that's basically what marketing or sorry, ServiceTitan does is it basically just gives you a place where all your customers can live, right? Where all your data is tracked and it basically runs your business, okay? So it does like 80 to 90% of the systemizing of your business for you to where your systems outside of service titan aren't that complicated. Okay? And that allows you to be able to grow and scale your business predictably, comfortably, and profitably. Alright. So go get surface service Titan. There's a link down below. Make it happen. See you in the next video.

Financing

So one thing you're gonna wanna do when you're signing up for ServiceTitan is you're gonna want to get integrated with some sort of financing option. You're gonna wanna use one that actually integrates with ServiceTitan. That way when your techs are out in the field and they're presenting their options, it's actually gonna give how much it would cost per month, to the customer. That way the customer can see, oh, what's that monthly charge? Right? And it's a really easy way to go into financing. Financing is also gonna help you guys sell a lot more work. Okay? One thing we do whenever we finance a job, we created a tag. The finance company that we use is service finance. So we tag those jobs service finance. That way the technicians in the field will see, oh, this is a finance job. And when they go check out the job at the end to invoice the customer, they're just gonna go select service finance. K? And that lets our management team in the office know that they need to go to service finance and apply for that money. K? So let's take a look at this job. I mean, you look at this job and let's see here. Let's look at the invoice. So this is an \$11,000 job. Right? So a lot of guys, they don't wanna drop \$11,000 on a job. So like this guy, Scott Morrison, he's one of our good customers, and he financed this work. And probably the only reason we sold this work is because we were able to finance it to him. So you're gonna find

that like, you know, plumbing's expensive, right? We already learned that in these last classes. And so if you can offer financing, then a lot of people don't have any money at all. They're gonna use you even though you're more expensive than maybe the cheaper guy because you have the option to finance the work. Okay? So go sign up for a financing company that integrates with ServiceTitan. This should be part of your onboarding process with ServiceTitan. If it isn't, make sure and ask them about it.

Business Units and Job Types

Alright, guys. When you're setting up ServiceTitan, one thing that can get kind of confusing is job types and business units. Okay? Because ServiceTitan is built to handle, you know, a much larger business or businesses doing all sorts of different kind of work. Okay? So what I want you to do is I want you to keep this as simple as possible. And if you find out later you want something else, then you can add it in later. But so under job types, you know, basically it's when a customer calls into your business, your CSR is gonna be able to select job type, and then she's gonna have to select a business unit underneath that job type. Okay? So job types for you guys, if all you do is plumbing, I would just do plumbing and plumbing warranty. Okay? And for anybody who's doing HVAC, I would just do HVAC service, HVAC warranty or sorry, I would just do HVAC and HVAC warranty. Okay? And then for business units, I would do HVAC install, HVAC service, and I would do plumbing install plumbing service. Okay? So basically, when they select over here plumbing, then you would get the idea to say, okay, is it an install job or is it a service job? And nine times out of 10, it's gonna be a service job. We rarely select this install job. But that just allows you to see the difference at the end of the year. You can run some reports and you can say, okay, how much money did installs make me and how much money did service make me? Okay. And that's really all you guys need to do. So under job types, I would do plumbing, plumbing warranty. And if you have HVAC, I would do HVAC and HVAC warranty. And then for business units, would have plumbing install, plumbing service, HVAC install, HVAC service. And that's all I would do. Alright?

Pricebook Materials

Okay, guys. Now it's time to start putting your price book that you built on the spreadsheet into ServiceTitan. K? And the before you start actually building out all your services and your categories and all that, the first thing you're gonna wanna go do is build in materials. K? And so I have a little quicker way to build materials that I still use to this day and I don't see anything wrong with. So I wanted to share it with you here. ServiceTitan's gonna want you to build in every single part that you ever use on every single service. K? So all your half inch copper nineties, half inch pro press nineties, half inch black nineties, '3 quarter copper nineties, three quarter pro press 93 quarter black 90, like everything. K? So you can imagine you're gonna have thousands upon thousands of materials to build out. And then when you go build your task, you're gonna have to add each individual material to that task. I do it a different way, so here's my way. K? Take it or leave it. So in ServiceTitan, if you navigate to the price book section, and then on this left hand tab over here, you go to materials. This is where your materials live. Okay? And so what I do is I build out a \$10 material, a hundred dollar material, and a thousand dollar material. Okay? And that's it. And then when I go build on my services, I change the quantity to reflect the actual cost of the materials on that task. And I'll show you what I mean. But first, I'm gonna show you

how to build this material. So click add material. I put 10, and then I put 10, and then I put 10. Okay. And then you're gonna have to come in here. You're gonna make sure and select an income account, expense account. And I think it's gonna make you do a vendor down here. And service site will show you how to build all these vendors and all that stuff. And I'm gonna label this one test just so I know what it is. So then save. So then if we go back to my materials, you can see here's the one that I put. Name is ten, ten test. Oh, I should have put in the category and description 10. So then what you're gonna do is you're gonna go to edit mode right here, and that's gonna allow you to come in here and select category materials. And it's gonna allow you to come in here and actually change the cost of the material. Okay? So then I'm gonna put \$10. So now I have that material in there and I'm good to go. So now when you take this and you're building out your services, which we're gonna get into later, let me go pick a service. So here's a blower motor. Okay? Let's pick let's edit this service, and I'll show you what I mean. So when you build a service, you have to build out all the details of the service, but then you also have to build out the materials in this material tab. And what you're gonna do is you're gonna select which material you want to use in here. Okay? And so here's the one we we created, the extra 10. And you can see so for this material, I just selected a hundred. Though, I don't wanna do that. Let's go back to that blower motor. There we go. Boom. View edit service. So you can see on the materials, I selected 100, and then we changed the quantity to point nine three to get the dollar amount we wanted. If this was a hundred and \$50 item, we'd put 1.5. If it was a \$200 item, we'd put two. Two hundred and 50 dollar item, we'd put 2.5, and so on and so on. Okay? And so you really only need these three materials to build out your entire price book. Now you can imagine if, let's say, this was a water heater task and I came to materials and then I had to enter in every single 90 I'm gonna use, the flexes I'm gonna use, the valves I'm gonna use, and find all those if there was thousands of materials here. It gets very difficult. So we find this so much easier to do. So take it or leave it, you can build out thousands of materials or you can just build out three of them. See you on the next one.

Pricebook Categories

Okay, guys. Now it's time to start working on your price book. So you've got your materials in. Hopefully, did materials the easy way. If you didn't watch that video, go back and watch it. Now it's time to start putting in your categories. Okay? So again, navigate to the price book tab up here. And then on this left hand side, you can go to categories. Okay? Now you're gonna wanna start adding in all your categories. So here's the spreadsheet that we that you built all your tasks in and down here are all the categories. K? So you can see I've already got my categories built out, but to add a new category, you're gonna come in here to add a category and you're just gonna type in whatever is written down here or whatever you wanna call it in your price book. Okay? So let's assume I typed in admin and I just created that category. Okay. And here it is, admin that I just created. Now you can come over here and you can change the picture. Okay. So I would go to Canva and I would create these pictures. And if you haven't, watched the thing on Canva yet or you don't know how to use Canva, there's a whole section down below just on Canva and how to use it. Okay. And then you can come in here and you can create subcategories. Okay? So if you came in here like water heater, we have the category of water heater. Then we're gonna have a category of electric. And then in mine, I have a category of indirect. K? So you can come over here. If you need to add a subcategory, then you would come over here and you would say, okay, add a

subcategory, and it would make a subcategory under admin. Okay? And what that looks like in your price book, I will just show you here. Like for water heater, that's water heater is the main category, so it's on the main page. K? And then these are the subcategories under water heater. So I've got four subcategories. K? And that's how that looks. And you can go super far with that. You can have subcategories within subcategories within subcategories. I would just caution you, keep your price book as simple as possible. Okay? So come in here, build out all of your categories first, because in order to build out a service, you need to be able to put it into a category. That way you'll have your materials done, you'll have your category done, and the next will go on to building out the individual services. See you guys.

Build Your Pricebook

Alright, guys. So now it's time to start building your price book out in ServiceTitan. Okay? So you've got it all built out in this spreadsheet, and you've got your good, better, and best options selected. Now you just need to go into service Titan and start putting it in service Titan. Okay? And you don't want to do this until you have all of your categories set up and you have all of your materials set up in service Titan as well. Okay? And all you're gonna do is you're gonna click on the price book tab up here. You're gonna go to services. And when you log in, you're gonna have nothing here. Okay? So you're gonna wanna come up here and click add a service. And I've just got the toilet task, pulled up here. So this is just the copy of the hourly rate calculator. I'm on the toilet tab. Here's all my toilet, stuff and all my better good, better, and best. And this is how we're gonna go put it in the price book. K? So you're gonna start off with task code. You're gonna be TLTDash001Dash I mean, you can actually copy and paste this. It would probably be faster. So if you just come over here, double click and highlight this, command c and command v. The name, supply line, you can just copy, command v, paste. The description gets a little bit trickier. You gotta delete a little bit of the stuff in here, but it's not too bad. So you just need to take and delete this and delete this last little bit. And then I would come up here and I would make this bold. And I always make the one year parts and labor in mine. I make it italicized. And that's how I do all of mine. K? There is this warranty description box down here. When the guys pull up the task, this doesn't show, so I like to put the warranty up here. That way, it's right in front of the customer. They can see that we offer a warranty, and that way, my guys are explaining that to the customer. They're explaining, hey, you know, this comes with a one year warranty, and that just adds value to your service. K? If you're in a taxable state, then you're gonna select this as taxable. Setting up all the taxes and stuff, that's gonna be something that service titan's gonna have to help you walk through during your setup. K? But this will automatically charge for the taxes on the product as well. Alright? So then you're not gonna mess with any of the pricing. That's all gonna get done, in the price setup tab. Once you're done putting everything in there, then we'll go through the price setup tab and we'll set up all the prices on all your stuff. K? So you're just gonna scroll down. The next thing you wanna do is you wanna put in the hours on the task. Okay? And this is only, time on-site. Okay? So it's the hours that you put in your price book. And the drive time will get calculated when we do the price setup. Okay? So hours, you're gonna put point five. Cross sale group doesn't matter. General ledger account, that's gonna be whatever your ledger accounts are when you set it up with service titan. It's gonna you're gonna wanna match it with QuickBooks, I believe. Mine is revenue. That's all I keep it in. And then a category. So now we gotta put in the right category. So I'm gonna pipe type toilet cause that's the

category that it needs to go to. You can see here I have a toilet category. Upgrades, if you wanna add upgrades, so this will pop up at the bottom of the screen. If there's like an upgrade you wanna use for a supply line for some reason, you can put it out in here it'll automatically upgrade. I don't use the upgrades at all. Recommendations, I always put in the, diagnostic waived. And let's see. So you can just type in free. There we go. Ten minute line of sight diagnostic. Because you guys are gonna wanna add this to every single estimate. You're gonna wanna at least well, you just want one diagnostic waived. Right? That way, it accounts for that half hour of drive time, and the customer can see that, oh, hey. We're getting that waived. It's a \$96 value. Appreciate that. Then you're gonna wanna add an image. There's a whole course on Canva on how to build these images. I already built one for this and put it on my desktop. And let's see here. Where'd that go? There we go. Toilet supply line. And then you can also enter in YouTube links. So if you go find a YouTube video about a toilet flex, that's not really, you know, a thing you would wanna do. But like for a water heater, like a Rheem water heater or Bradford White water heater, you could go find a video that Rheem or Bradford White put out about their water heaters, and you can put that in here, and your guys will be able to play it to the customer in the field. That's something that's that's cool to do. So that's all I do in this tab. So you've got all that stuff done. Ledger account, categories, recommendations. You got the image in there. You've got whether it's taxable or not. I'm not taxable. We don't do tax, so I'm not gonna tax it. And then we've got the description, one year parts and warrant warranty. We've got the name and the task code. K? So then we're gonna go over to materials. And this is where you're gonna select how much the materials are. K? So it's a \$10 material as I can see. So I'm gonna come over here and just select \$10 material. That's easy. Now if this was a \$12 material, I would just change this to 1.2 to make it \$12. K? But I can just have it as one because it's a \$10 material. Now you might wanna think about when you're doing this, think about they're probably gonna use a rag. So you might wanna make this, like, 1.1. Make it \$11. That way you cover your rag. And there you go. That's it. Equipment, you're not gonna have any equipment. I actually don't use any equipment in my service Titan. We don't track that at all. It just keeps seeing super simple. And then workflow, the only time you're gonna use that is when you're building out your membership. And we'll go over that a later date. Okay? So then you're gonna click save. And I already have this task in my price book, so it doesn't want me to, create another one. So I'm just gonna add a zero so you guys can see what that looks like. Then you can click save and it will save the service. K? And then when I go to my price book, I'll be able to look up TLTDash001, and there should be two of them. And here's the one we just created. And then if we go to the mobile view of my task book or price book, we should be able to go to toilet, and we should see here's the one I had in my price book earlier, and here's the one I created. And you'll notice it doesn't have a price on it yet. K? It's \$0. Anytime you come and add a where'd that go? There it is. Anytime you come and add a task or adjust a task, you then have to go back to this screen and run your price setup tool again, and that's what will adjust the pricing. So anytime you adjust your materials or hours or build a new task, you need to come back to this price setup and redo it to adjust the price on the task that you just built or changed. Okay? So you guys are just gonna go through your price book and you're gonna build out every single task that you put on your price book. And then once you're done with that, we're going to go through and build out the good, better, best scenarios. I'll see you over there.

Build Your Options

Okay. Now it's time to go in and build your good, better, best options. Okay. You want to make sure and build these for your guys. That way they can use them at the blink of an eye. All right. And you want to make sure you have all of your services in your price book, all of your materials are in, all of your categories are set up, make sure all of that is done before you move on to this step, okay? And this is probably the most confusing part, so I'm going to try to explain it as best I can. Okay? So when you're in the price book tab in service Titan, on the left hand side over here, you're gonna see templates. Okay? And you have estimate templates and you have proposal templates. A proposal template is the good, better, best. K? And then the estimate templates are the parts in the proposal template. So you have to build a good estimate template, a better estimate template, and then a best estimate template. And then you can go build a proposal template and put the good, better, and best in the proposal template. Okay? So what that means is you're gonna build an estimate template. You're gonna build three estimate templates for every single task in your price book. Okay? You're gonna build out the good, which is the main one, and then you're gonna build out the better, and then you're gonna build out the best. Okay? So I'm gonna walk you through how that works. And I wish service Titan would make this easier, but it's not. So you're just gonna have to put in the time and get it done. But the good thing is when you're done, it's done, and your guys will sell a whole bunch more work because you did it. Okay? So just go get it done. Alright? So you're gonna wanna start off building estimate templates. So to do that, you're gonna click this create button up here and you're gonna click estimate template. Okay? So let's just start with this, toilet supply line, and we'll build out the good, better, best, and then I'll show you how to go build out the proposal template. Okay? So for the internal name, I like to put the, task name. So supply line, and then I put whether it's the good, the better, or the best. So in this scenario, we're doing the good. Okay? And the estimate template name, I'll put supply line. So just the task name again. The summary, I leave blank. Dynamic. If you select this, that means when you go and change the price in the price book, it will also change it in this template as well. That's what I always select because I always wanna make sure I'm charging enough to be profitable on all my jobs. Okay? Otherwise, it would be static and you would have to come in here and manually change all the prices and that's not what you want. So select static. Then you wanna hit continue. And this is where you're actually gonna add the service to the estimate template. K? So then you're gonna add a service. You're gonna come in here and type the task code, and usually you're gonna pop up this thing here. K? So supply line, bam. And it adds in the task code and the materials. And then you're gonna hit create template, and that's it. Then you're gonna go create the better template. Okay? So again, create estimate template. Internal name is gonna be supply line better. Estimate template name is going to be, supply line. And then I'm actually gonna go so this is supply line with TLT two. So it's supply line and shutoff valve. Okay. Add that y in there. And then I'm gonna leave the summary blank. I'm gonna have the dynamic price book selected. I'm gonna go in here, and then this time you're gonna enter in the supply line. I'm gonna go with the task code. TLTDash001 supply line, and then I'm gonna go enter in the other one, TLT zero zero two. So I'm gonna add another service. This is gonna be TLTDash002, shutoff valve. And then over here, you're gonna select the add on button for the second task there. Okay? So this first task has your drive time built in. This second task has the drive time removed. Okay? And then you're going to go down here

and you're going to hit create template. Then you're going to go create your third estimate template. Okay. Internal name is going to be supply line best, and the estimate template name is gonna be supply line. And, we were shutoff valve. And we also included let's scroll this over a little bit. TLT six, which is I believe a tank rebuild. So and tank rebuild. I'm gonna leave the summary blank. I'm gonna select dynamic again, and I'm gonna go continue. And I'm gonna go add all those things in. I'm gonna add in TLTDash001. I'm gonna add in TLTDash002 shutoff valve, and I'm gonna add in TLTDash006. Tank rebuild. And then these two items here are gonna be add ons. K? And then I'm gonna create the template. So now I've got my three estimate templates built. Now let's create the proposal templates. K? So when you go to proposal templates, you can see these are the good, better, best. Alright? So let's go in here and we'll go create proposal template. And I'm gonna call this proposal template name supply line. And what I like to do is I would prefer to do this supply line, and I would put toilet. And on anything that had to do with the toilet, I would put the name of the proposal template and then the toilet. That way all your guys gotta do when they're searching for options because when you pull up options on the iPad in the technician view, you have to search for them. So if you name it the same as the category that it's in, then all they have to do is search toilet. So they're gonna get real familiar with those categories that you built out in your price book. So if you rename this, they're gonna remember. Okay. This has to do with the toilet. All I gotta do is search toilet. And it'll pull up all the toilet proposal templates. And then they can just select the right one. Makes it super fast, super easy for the technician. Okay? I leave the business unit blank. I leave the proposal template summary blank as well, and then I would hit continue. And this is gonna bring you into this screen where you're actually gonna look up the estimate templates that you built, and then you're going to put them in a good, better, best scenario. So we need to do under proposal type right here, you would need to select good, better, best. This is what we have the best luck with. And then you're gonna wanna look up supply line. So we've got supply line and then you're gonna wanna look up. We've got angle stop with supply line. Here's the one we built supply line and shutoff valve. And then we've got supply line and shutoff valve and tank. Okay? And that's how we're gonna build the proposal template. And so when you guys go to search for it, they're gonna search toilet. They're gonna find the supply line one because that's what the customer needs fixed is their supply line. And we're gonna give them these three options. Hey, here's your good option. We can replace your supply line. It's 387. Or we can go in and we can replace your supply line and your shutoff valve. Your shutoff valve is looking old as well. We can do that for \$752, or we can come in and we can replace your supply line. We can replace your shutoff valve. We can actually rebuild all the guts in your toilet. That way your whole, you know, all your guts is basically brand new. The cat the, porcelain on your toilet looks like it's in really good condition. So there's no really need to replace your toilet unless you really want one. We can do that for a thousand \$504. How would you like to move forward, miss Jones? Right? And that's all you do. And then you would click save and publish, and then you would have a good, better, best supply line toilet proposal. Okay? So what you're gonna do now, you can see, like, just did that for this one task code. Okay? So for every single task code, you're gonna have to come in. You're gonna build out an estimate template for this, and then you're gonna build out an estimate template for your better and your best. And you're gonna do that for every single task in your price book. K? And then you're gonna build out a proposal template, and I suggest you do this after you build out the three good, better, best estimate templates. Go in and build a

proposal template right away. That way you don't forget what you called them or get confused. Okay? So you can see how this is a lot of work and it's a little bit confusing, but once you get going and you actually build your first one, you guys will be really good at it. So get to work, go in, build all of your good, better, best. Okay? This is like crucial to getting your guys to sell well in the field. So good luck.

Build Out Custom Task Categories

Alright. Now it's time to go in and build out your custom task section. K? Because we skipped that when we were building your price book because to build it all, you know, in a spreadsheet is just a waste of time, in my opinion. So to save you guys some time, we just build it right in service type. Okay. So you're going to want to come to the price book section, go to categories, and you're going to want to add in your categories first. Okay. So we're going to go over that in this video. You're going to click add a category and you're going to write custom. Okay. I've already got mine built. So I'm going to show you guys down here. Here it is. Here's my task or my category custom. And then if I click on this, you'll see I've got a bunch of subcategories, okay? Which are the timeframes of the job, okay? So you've got fifteen minute, thirty minute, forty five minute, one hour, one and a half hour, two hour, three hour, four hour, six hour, and eight hour. And what I do is I train my guys, I say, okay, if you think it's gonna take you an hour, bid it for an hour and a half, and so on and so on and so on. I always tell them to go one step above. K? So if they think it's gonna take four, bid it for 6. We can always talk the customer down. It's gonna be really hard to talk them up if we, you know, if we're in there for if we bid it for four and we're there for five, well, we just lost an hour. K? And that's not what we wanna do. And so you guys are gonna use this custom task section whenever they, you know, get to something that's out of the ordinary that you wouldn't normally run across on a daily basis that you're not gonna wanna have in your price book. Okay? And you're gonna find your guys are gonna use this quite often, so it's really important to have it built out. Because it gives them the power to be able to say, okay, I think this is gonna take this long. It's gonna take this much in materials, and I can bid it at this price. And that prevents them from having to call you every ten minutes to get a price on something. Okay? So once you build your custom category, go build all these subcategories. To do that, you just click here, add subcategory, right? And then you go fifteen minutes. Once you've built out all your timeframes, then you need to go in and build out the materials cost. Okay? So under fifteen minutes, you'll see we've got \$10 all the way down. And we go all the way to \$5,000 okay? And you can see the increments get larger as we go up in dollar amount. That gives us more fluff. K? More margin, more room for error. K? So you can see. So you guys can just scroll through that, you know, pause this video if you need to to keep this, top of mind while you're building these. But you're gonna go build these dollar amount, these subcategories to the subcategories. You're gonna do that under fifteen minutes, under thirty minutes, under forty five minutes, one hour, and all the way down. Okay? And this is gonna take you a while, but you gotta get it done. So go build the subcategories. And then in the next video, I'll go over to how to actually build the task for these custom tasks, because now you need to go build tasks for every single one. Alright? So get this done and then move on to the next video, and we'll build those tasks out. I'll see you over there.

Build Custom Tasks

Okay. So you've built out all of your categories for your custom task, and now it's time to build out all the services. And so I'm gonna show you guys how to do that. Okay? And I would prefer to actually pull it up in two different windows so that I can kinda keep track of what I've got going on. And so I will just kinda overlay them like this so I can see, okay, I've got fifteen minute, thirty minute, forty five minute. I'll probably open this fifteen minute one and I'll just work my way down this list. Okay? So we'll build the \$10 15 minute and just work our way down the list until we have that one done. Okay? So then pull up your services in another window. So that's price book services. And then we're just gonna, just like before, we're gonna go in, we're gonna add a service. Okay? One thing you gotta keep in mind is your customers are gonna see everything you write in here. Okay? And we don't want them to know how many hours we have in it. We don't want them to know how much time we have in it. Or sorry, how much we have materials. Right? So you're gonna wanna use task codes throughout this whole thing. Okay? And then your guys can rename the task, edit the item description, and make it look like a real task. Okay? So we're gonna start with the ten minute, fifteen minutes ten minute or sorry, fifteen minute, ten dollar task here. I would go CST for custom. You can see I've already got some of these dash and then for fifteen minutes, I would go, sorry, like to keep this like this. I would go, let's see, 010, so that's \$10. And then I would go Dash00Dot25. Okay? And then I would just copy this and I would make this the name. K? And then I would come in here and I would write edit item description. Okay? And you're gonna have to train your guys. Hey, anytime you use a custom task, you have to edit the item description. Okay? That's just one thing you're gonna have to get them to do. And they'll get used to it once they start doing it. So then you're gonna scroll down just like all your other tasks, you're gonna add your hours into it. So it's gonna be 0.25 for fifteen minutes. You're gonna put it in your category. K? So you're gonna wanna put it in your, \$10 15 minute category. So you should be able to type \$10 and then \$10 15 minute. And then for an image here, I just put my company logo. That way my company logo is on this task. That's worked out really well for us. And I always put the diagnostic fee waived. Okay. So diagnostic free ten minute line of sight inspection. Okay. So that's how you build the task. And then for materials, you're gonna come in here and you're gonna add in \$10 of materials. Okay. And you'll click save and that's it. So then you're gonna go I'm gonna just leave this page because I've already got that built. So then you're gonna go build the next one, \$25 15 minutes. So you're gonna go 025. So that's \$25.00 0 dot \$2.05. Okay. So exact same thing. Okay. And then you're going to put this here. You're gonna write, I like to make these bold, edit item description. And then you're gonna come down here. You're gonna change the hours to point two five. Oops. There we go. And you're going to change the category. Again, it's going to be \$25 15 minute. So you're going to go \$25, 15 minutes. 15 minutes, 20 5 dollars. Right? Custom. That's the category it's gonna be in. Upload your your image here. Go to materials. Make it \$25, and then save the task. So you're just gonna work your way down this list just like that. So this is just how I do it. You guys can come up with your own task code if you want, but this makes it easy in my head because I can see, okay, this is \$25 and 15 minutes. I know exactly what my guy sold just looking at the task code. Alright? So you're gonna roll down the list and do all the fifteen minute ones. And once you're done with that, you're gonna come in here, you're gonna open up the thirty minute ones and you're gonna do the exact same thing. Except over here, it's gonna be CST, you

know, 30 sorry, you're gonna have CST, you're gonna have the same thing. CST \$10, right? Except this is gonna be point five zero, right? And so on and so on and so on. Then the next one's gonna be CST 25. Okay? And so on and so on and so on. And when you get down to these bigger numbers, like the 5,000, I would just put in here 5,000. Just like that. Okay? Piece of cake. So you're gonna wanna go through and go do all of these. It's a lot of tasks to build. It's gonna take you a while. I would just look at these in chunks. Okay. I'm gonna get I'm gonna sit down and I'm gonna get at least this fifteen minute one done. Because if you leave off like halfway through the fifteen minute, it's gonna get really confusing. Another thing I've done is I've actually gone and got a notepad and I just wrote \$10.30, 20 5 dollar 30, 50 dollar, you know, and I check them off as I go so I don't get lost. K? Because if you mess this up and it gets really confusing. K? So make sure you just work at it, get it done, you gotta do it, and then it'll be there. See you guys.

Troubleshoot/Test/Inspect

Alright. So now we're going to go back to our price book, and we're going to go build out some additional categories, specifically our troubleshoot test inspect categories. Okay. So you're to go to price book, categories, mine's all the way down at the bottom. So just like you did with your custom tasks, you're gonna build out troubleshoot test and inspect. That's gonna be your main category. And then within that main category, you're gonna have four other categories. Fifteen, thirty, forty five, and sixty minutes. K? And then within each of these subcategories, you're gonna have services. So you're gonna have a fifteen minute troubleshoot, fifteen minute test, and a fifteen minute inspect. K? So need to build these categories out and then go build out the services within these subcategories. Let me show you what that looks like in my price book here. So if it ever loads, there we go. Scroll to the bottom. Here's the troubleshoot test inspect main category. Here's the fifteen, thirty, forty five, sixty minute subcategories. And then if you click on these, we have options to do a fifteen minute inspection, a fifteen minute testing or a fifteen minute troubleshoot. This just allows your guys to go sell, an additional fifteen minutes of inspection, testing, or troubleshooting. Because you don't want them to really spend much more time than ten or fifteen minutes diagnosing the problem. Right? So if they think it's going to take them thirty minutes to diagnose a problem, then you need to train them to go in and say, hey, I got to run this test in order to figure out what the problem is or to diagnose this properly. So running that test is gonna cost this much money and you would use this category. Alright? See you guys on the next one.

Price Set Up & Material Markup

Alright. So once you've got all of your categories done in your price book, and you have all of your services built out, and you've got all of your options built out, your pre built options, your templates, your estimate templates, and your invoice templates. Right? Now it's time to actually run through the pricing calculator. Okay? Or the pricing build up. Okay? So what I use is this price setup tool here. I find it to be super easy. So what you do is over here, you're going to see all of your categories. Okay? You're going to see all the categories that you built just now and you're going to want to price most of these with this calculator. Okay? There are a few exceptions. So like if you have a membership, you don't wanna use the calculator on the membership. I mean, we have certain admin tasks, right, that have, you know, a half hour time, but they need to stay \$0. So I will not run this on my admin. So I'll usually click

select all. I'll deselect admin. I'm gonna deselect random because I don't know what it is. So I'm guessing my general manager put it there. And then I'll come down here and deselect membership. Okay. Everything else, I'm gonna run off this same calculator. So then right here you're gonna put in your billable rate. So that is whatever you the number is on your hourly rate calculator, you're gonna put it in here. Mine's 598. And then you're to want to put in a surcharge. Okay. So if you're surcharging half hour of drive time, your surcharge is going to be half of your billable rate. So mine's basically 600, I'll call it \$2.99. Okay. And then you're going to put in your member discount. Okay? So mine's 10%. Remember because I marked it up 30% in my hourly rate calculator. So I could give my members a 10% discount. Okay? And I always apply discount after labor service and surcharge. And actually I apply discount to labor service before the surcharge. There you go. And then for an add on task, this is for a primary task. So for an add on task, you're gonna be \$5.98, but you're not gonna have a surcharge. Okay. And then you're gonna have a 10% member discount. Okay? So that's how you set up the pricing for the tasks. And you're gonna go here and it's gonna show you what the prices are gonna be. This is really bad to look at. Okay. So it's easy to come in here and go, this is way too expensive and have a heart attack. So I would go through and just make sure it's right. And then if it is right, if it looks right, then click save. Okay? And that will save the prices. Okay? And then you can go back and see if you click this history button over here. You can go back and see the price changes over time. Okay? And what you put for price changing. Okay? So the other thing you got to do on under the price setup is you got to figure out how to mark up your materials. Okay? So if you scroll further down, you'll see materials. You can click select. I don't need the price book starter, just the materials. And what you're gonna do is you're gonna come down here and you're gonna go surcharge 100%. And then an add on, you're gonna go surcharge 100%. Okay? And that's gonna mark up your materials 100%. Then you click next and it'll show you your materials. Now for some reason, this is always wrong when I look at it. K? So it always tells me a \$10 part is \$44, hundred dollar part is \$440, Thousand dollar part is \$4,400. K? So I don't know why it is this way, but this is right. So what I always do is I will click save and then I will go back to my services. K? And I will find a service that I know has some parts on it and is an easy one to calculate. Okay. So let's go to let's find a one hour task that I know has some materials. Here we go. LE turbulator kit. So I'll go check out this service and I'll say, okay, the materials for this task are a hundred and 10 dollars. And I know that my hourly rate is \$598. And we should be charging \$220 for these parts. So \$2.20 plus \$5.98 is \$11.39. Okay. So let's do the math. Let's see. I'm gonna pull out my calendar or my calculator on my phone. So it's \$5.98 plus my \$2.99 travel time. Right? My add on fee. Plus the \$2.20 for my materials. Comes out to \$1,117. Okay? So it's not exact, but it's really close. And guess what? It's close enough. And that's how you set up your pricing and service type. And so whenever you do your price setup and you do your materials, you only have to do this once unless you go change materials. I would just go in and double check to make sure it's marking up your materials properly. And you can double check a couple tasks. It's usually within a couple dollars. Okay? The other thing is anytime you go in and you edit a task. So for a service. If I was gonna go in and edit a service, let's say I was to edit the service, I was gonna change the time or the material cost, you have to go back to this pricing setup and you have to rerun this portion of the pricing setup for the price to change. K? So anytime you make a change, you have to rerun this pricing setup. And as long as you built your templates, k, your estimate templates and your proposal templates, as long as you built them so that they're

not static, but they're you built them to change with the pricing. Anytime you come change the pricing and the price setup, it's gonna change the pricing in your prebuilt templates. See you guys.

Hours Sold Report Automation

K, guys. One thing you're gonna wanna do is you're gonna wanna set up some automations for some reports in here. K? Because if we're selling hours, right, and we're tracking our business, how successful we are by how many hours we've actually sold, then we need to get that information to our guys and to ourselves so that we can see every single day and every single week how well we're doing. Okay? So you can actually automate those reports right here at the top if you click on reports. Okay. And you can see up here, you've got all reports and then you've got scheduled. All right. So we send out how many hours you sold last week. Look at this, right. That's so my guys will actually look at it And then hours you sold yesterday, look at this. Okay? And so everybody in our company gets these reports. Our bookkeeper gets the sold hours last week, so she knows how to pay the guys. Everybody else gets hours you sold yesterday and hours you sold last week. And then we train them how to send how to like, we train them to look at this and how to read it and then go, okay, guys, you know, it's Monday through Wednesday and you've sold X amount of hours and your minimum is this means you got to hit this right to make your quota, or you got to hit this to get your pay bump. Right? So if you want to, schedule this out, you're going to go to all reports and there's a report in here called hours sold. I'm pretty sure if you just come up here and you hit hours, it's called field conversion report. There it is. Okay. And you're gonna wanna like do this on the day that you want the report to go out. So I have this report. The weekly one goes out every Monday. So you have to actually build this report on Monday. Okay. So you can go and you have to run the report. So let's go, okay, I wanna see how many hours we sold last week, all apply, all business units, all job types, and I'll go run report. And there's the report of what we sold last week. \$95, if you scroll over, you can see you'll see hours in here somewhere. Job billable hours, hundred and fifty eight hours, hundred and fifty eight point five eight hours. And I know I've only got a bill out a hundred and 24 to pay my bills. And I think this puts me at like 28 percent profit or something like that. So I can look at this and go, sweet. I'm good. I sold enough hours last week. Right? So then to automate this report, you're going to come up here after you've ran it, you have to run it first. You're going to click these three buttons and you're going to go schedule. And you're gonna schedule a simple report. Email subject, you're gonna put, hours sold last week. Okay? And then I would do look at this. Okay. I always export these as a PDF so they can just look at them real quick. Date range is gonna be trailing seven days. Business unit, you're going to want to select all your business units, right? Because you're going to want them to see what they sold. And then job types, you're going want to select all your active job types. And then you're gonna go hit next. So then you're gonna add people to your team. Okay? And you're gonna add all your employees. Okay? So you're gonna come in here, like Jared's gonna get this report. Natalie is gonna get this report. You know, all your technicians are gonna get these reports. Right? And you're just gonna add them in here. Right? And you can select for recipients to only see their own data. I prefer to have everybody on the team see everybody's data so they can go, oh, dang, Nick is selling way more hours than I am. What is he doing that I'm not doing? Like, I'm falling behind. Everybody's selling more hours than me. Like, I gotta pick up the pace. Right? So I want everybody to see everybody's

stuff. And so I leave this unchecked. Then you're gonna click next, and then you're gonna select the cadence. K? So you're gonna I'm gonna send this report every seven days because it's gonna trail seven days. So then it's gonna get sent every seven days. And I send this at the start time. Okay. So we start at 8AM. Most of my guys are logging into their iPads around, you know, 07:45, seven fifty. And I want this to be at the top of their email inbox. So I send this at 07:30. Okay. So usually about thirty minutes before start time, that way guys can log into their email. It'll be there before they start their day. They can see how many hours they sold yesterday. And if they're keeping track, they can calculate how many hours they're selling and then hopefully sell enough hours for you. Right? So then you're gonna click schedule, and that's gonna schedule that report for you. Okay? So the next one you're gonna wanna schedule, that's the weekly one. Next one you're gonna wanna schedule is the daily one. Okay? So you're gonna go in here. You're just gonna select today. There we go. And you're gonna go apply. Actually, what you should do is select the day before. Go apply, run report. Same thing, you can see what you sold. So we sold 13,000. Wasn't that great of a day. Job billable hours only twenty three hours. So Friday, all we did was pay our bills. But I know I paid my bills, so I'm good. Right? We'll make up the profit on another day. And I'm gonna go up here. Now this is all good. I'm gonna click these three buttons. I'm gonna schedule. We're gonna run a simple report. This is gonna be hours you sold yesterday. Okay? Look at this. I'm gonna run it as a PDF. Date range is gonna be yesterday, all business units, all job types. And then you're gonna add all your technicians. K? I'm just gonna add myself in there. And then this one, I'm gonna send it every one day at the same time. So they're gonna get a report every Monday at 07:30, and then every single day, even Saturday and Sunday, they're gonna see how many hours they sold the day before. Come Monday, they're gonna see Sundays. It's not gonna matter. So they can keep track here. They're gonna see physically in their email how many hours they're selling each day. Okay? So anybody who wants to see these numbers, you're gonna do that. Go build out these, email or these report automations. They're super important to get these to look at how many hours you're selling. That way you know how you're doing. It can provide a lot of comfort in your business. It can provide a lot of insight in your business. And then you can go compare these hours to your hourly rate calculator. And you can actually like track these in a spreadsheet and you can track how you've been doing over the past, you know, so many months. Right? So me and my general manager, we hop on a Zoom call every Friday, and we track all of these numbers. How many hours we're selling the week previously? We're tracking bank balances. We're tracking all sorts of good stuff so that we've got a really good idea of where we've been, where we're going, and how the changes we're making to our business are affecting our our sold and our overall performance. K? So go build these out. See you in the next one.

Service Titan Bio Template

One thing you're gonna wanna get set up in ServiceTitan is these automated tech, text messages that go out to the customer. Okay? So when your guys dispatch to a job, they should automatically get this text message. Well, you're gonna have to come up with what this text message says, and you're gonna change it for each technician. So what we've done for you is we've created a bio template. K? So when we get a new employee, we run them through this bio template, and that's what we use to create that text message. Okay? So if you run through this, you can just change the things that are in purple. So their names. So

Nick was born in New York City. He graduated from whatever college he graduated from. It's a he, so he loves, helping people fix their plumbing. In his spare find, you'll find him four wheeling, mushing his dogs, and working on his own boiler. That's literally what that guy does. It is Nick's mission to provide you with five star service today. Call our office for any questions, and then we put our office number. So that's how we do all of our guys' stuff. So you guys can come in here. There'll be a link to this document down below. You can just come in here and click file, make a copy, and then you can have it for yourself, and you can use this in your business to make your bio templates as well.

How to take good technician Photos

Good employee photos are gonna be something that kinda sets you apart from the competition. Remember, you're gonna be texting the customers a photo of the technician along with a bio. And if that photo is super derpy, it's gonna look really lame and not be as perceived as valuable, okay? So just by upping the quality of your photo, you can create more value in your company and demand a higher price like we talked about in the value section. So one thing you can do is you can get a professional photographer to take photos. The hard part about this is that when you get a new guy in, then he's gonna be much harder. You know, you're gonna have to call a photographer every single time you get a new guy in, and sometimes that's just not doable. So you can actually take pretty good pictures with your phone. And in this class, we're gonna go over, you know, how to do that. Especially, you know, if you're just starting out, maybe you can't afford a photographer. So you can actually get pretty good photos with your phone. So you're gonna want a newer phone that's got a good camera on it. And you're gonna wanna shoot vertically. So if you're on your phone, you're gonna shoot vertically like this. You're going to use portrait mode or some sort of mode that's meant for taking a picture of a person or a face. And you're going to want to shoot outside with your vehicle in the background. Okay. And then you want them in their uniform, their hat, all that good stuff. If you don't have, you know, a stickered van yet, then just take it somewhere with a nice background. Okay. Whether there's trees in the background or something that is familiar with your town, Just make it look decent. Okay? If it's cloudy, you wanna shoot in in direct light. Okay? So if there's a cloud cover, then the lighting doesn't really matter. If it's sunny, you're gonna wanna find kind of a shaded area. So like this photo, the shop that we're at is to our right, and we're actually in the shade of the shop. You'll see that here shortly. Okay? So you're gonna wanna take the photos outside. This is an example cave. It's sunny. You're gonna wanna have a building come into the shade and take the photo this way. And you're gonna wanna get if it's cloudy, right, then you don't wanna be in the shade. If it's cloudy out blocking the sun already, then you wanna move out out of the shade of the building and take the photo there. That'll help you get better natural light into your photos. So those two scenarios. There's two positionings and you can see here. So this one, he's like, you know, three to four feet off the back of the van. So he's three to four feet away. That blurs the van in the background. Some of your phones have an option to do that. You can also do that in Canva. You can come in and blur the background, which makes it look a little more like a professional photographer, helps separate the background from the person. And then position two that I like to get is them actually leaning on their van. K? And so you can kinda you get a depth perception of the van kinda disappearing down the photo. K? And so kind of what that looks like is you've got position one here, you know, vans behind them, you've got two to three feet, and then you're taking

the picture actually at a little bit of an angle to the van. You're not straight on. Okay. So position one and position two, they're leaning up against the van and you're taking a picture looking down the back of the van. Okay. And remember, you're in portrait mode on your camera and you're taking a picture and you're getting about from the belt to whatever it is above his head. And then you're gonna go crop this when you put it in Canva. Service Titan wants a square picture. So you're gonna go make an Instagram post again in in service Titan. You're gonna drag this picture in there and you're gonna expand it to fit that square. And you're gonna make it so that it's about here just above the belly button, maybe underneath the arms to the top of the head is where you're gonna wanna get the square. Okay. And here's that, you know, go into Canva, Instagram post square, go in here and just drag it. You can see here I'm dragging away. Make it fit the whole thing, and then you can drag it into position. And you want just a little space above the head. And so that's the photo that's gonna get text to the customer. You can even put your logo on it if you want. That's up to you. Okay. And then you can always go in and you can adjust with brightness and contrast and saturation. Like if it's a cloudy day, some of the skin tones might not show up and you can come in here and add saturation, and that will help the skin tones kind of come out of the picture. You can also add warmth. That's another good one that will just kind of warm up the picture and make the colors a little more vibrant and just look really nice. You know, ultimately, you're trying to portray this idea of this happy, warm, colorful, nice guy that's coming to your house. Right? So that's about it for technician photos. If you follow those steps, you should get some pretty decent technician photos. And worst case scenario, you can always go hire a photographer.

Memberships

Alright, guys. Let's talk about memberships. Okay. So once you get into service Titan, you're gonna have the ability to create a membership. Okay? And really the reason you need to wait till you get on service site is just so you can track your memberships. Okay? So you can sell them and then you can track them. And service site is really good for that. So this is what it's kind of going to look like. You're going to have to make two task codes. You're going to have one that is the membership sale. Okay. So that's when you're going to sell the membership to somebody. The price never shows up right in my price book. So it's not \$2.79. You guys can just ignore that. And then you're going to have a task that is the fulfillment of whatever you include in your membership. Okay. So we do a free Tune and Clean on everybody's boiler. So we call it a member Tune and Clean. When our guys go there and perform that service, this is what they put on the invoice. This \$0 item. Okay? So that way everybody sees they got their Tune and Clean done. The customer sees they got it done for \$0. And then it's also got one point five hours on it. That way the technician still gets the hours, applied to his time card basically for going and doing the tune and clean. Okay? Or if you're paying piece rate or commission, then you would want to figure out, you know, how you're going to pay them for this so that they're not just going there and wasting their time. Okay. So memberships are really good for four things. Well, five things. We'll call it five. So the purpose of the membership number one purpose is just customer retention. So imagine you sell somebody a membership to your company and they get all these added bonuses and these benefits right for joining to be a member. And as long as they continue to pay you, they get all of these bonuses and perks like priority scheduling and 10% off. They need plumbing done, They're going to call you to get their plumbing done because they're

already thinking, well, I got 10% off at this company. I might get priority scheduling with this company. I've already done business with this company. They're going to continue to call you. So rather than continually like spending marketing money for new customers, you can retain a lot of the customers that you have just by selling a membership. Okay. And this raises the LTV. So lifetime value of your customer. Okay. So if you've got a customer that would normally stick with you, only call you once and maybe spend, you know, an average of \$2,000 with you, then your lifetime value of your customer is only \$2. But if you can get them to call you back multiple times, let's say you can retain them for like two or three years and they call you once a year and they spend \$2 with you. All of a sudden the lifetime value of one customer is \$6,000. Okay. So just by increasing the lifetime value of your customer, you can now afford to go spend more money on marketing to be able to acquire a customer. Right? Because if you're spending a thousand dollars just to get a new customer and you're only getting \$2 in return versus \$6 in a return in return, that's a big difference. K? So customer retention is huge in any business. Like you want to try to retain customers to the best of your ability. Okay. So memberships are a great way to do that for the reasons we just talked about. Second one is recurring revenue. Okay. Because if you're selling them a membership at a monthly fee, right, then you have revenue coming in at the beginning of every month because you're billing them for that small fee at the beginning of every month. So for example, at my company, our membership is \$49 a month. Okay. And we're making \$50,000 a month in recurring revenue just from our membership sales. Okay. So at the beginning of every month, we get \$50 deposited into our bank account. Okay. And what that does is it spreads that revenue that you would normally like. We would normally go do boiler tunes. Right? And we would bill the customer for it when we were there. But what it does now we go to do a boiler tune and we start billing them \$49 a month. It takes that revenue and just stretches it out across the entire year. So it makes the slow times in your business not seem so bad. Okay. An extra \$50 in a month where you're down, you know, \$50 is really, really nice. Okay. Plus, on top of that, having that recurring revenue, the more recurring revenue you have will add value to your business. So when you go to sell your business and you have recurring revenue in your business, your multiplier goes up. Okay. So people are going to be way more willing to buy your business because it has recurring revenue. It also adds value memberships do because they know that it's really good for customer retention. Okay. And they know it's really good for busy work. So they're going to be more likely to pay you more for your company because you have this built into your business. So let's talk about busy work. So when you sell a membership plan and you give us some sort of service for free to that because they bought into your membership plan, then what you can do is you can take that work that you're going to do for free and you can schedule it during slow times. Okay, so you're going to learn your industry, your area, and you're going to learn you're going to have really busy times and you're going to have really slow times. So if you can schedule that busy, that work that you would do during the membership during slow times, it gives your guys something to do during slow times, will get you into the customer's house during slow times, and will increase your revenue during slow times. Okay. So it's really good for giving you guys something to do during slow times and increasing revenue. Okay. Which is going to help your revenue overall. Plus that way as well. You're not going and doing that work during busy time. You're doing it during slow time. So then it opens more opportunity during busy time. So let me give you an example of that. Basically, so we go do tune and cleans, right? It's basically annual maintenance on your

heating system. There's a time of year. There's like a four month window where everybody wants that done. Okay. So we do hundreds and hundreds and hundreds of annual heating maintenance. Okay. Well, when we go there the first time during that four month window, will do their annual maintenance. We'll sell them a membership and then we will schedule their next annual maintenance for when it's normally slow for us. Okay. So then my guys are busy during slow time. And then during that super busy time, now we can go see one more customer. Right. We can go. We have just freed up time during busy time so that we can make more money. Okay. So having guys giving your guys something to do, plus it increases your revenue later on. Okay. And then the next thing is sales. It's just a really good sales tool. If you're giving 10% off, you know, all of your services in your memberships, which you can do if you priced your calculator outright and you had 30% for profit on your hourly rate calculator. Well, if you're we want to maintain 20% profit margins, which means we can afford to discount 10%. Okay. So now we can go to a house that they're not a member. We can give them options and we can say, oh, by the way, if you sign up for our membership, not only do you get all these benefits, but we can take 10% off every single one of these options. Okay, so it's a really good sales tool. So that is the purpose of memberships. Here's how we do it at my company. Okay, so we call it the Prospector Gold Club. So I would encourage you guys to name it something cool. So it sounds cool. We were prospectors. We're in a gold mining town. So it's the gold club makes total sense. Right? Kind of plays off of our business, you know, brand kinda. So I would encourage you guys to do that. And we give premium 10% off discount labor and materials VIP priority scheduling. So we will schedule members before nonmembers, and we will actually do this. If a member calls in and we've got nonmembers on the schedule, we will go see the members first. Okay? Especially if they, like, need us right away. We will get to them as quickly as possible. Okay? We waive our diagnostic fee. So the \$96 diagnostic fee that we would normally charge, completely waive that. And then we give them free annual boiler slash furnace maintenance. Okay, we do it for \$49 a month or \$5.99 annually. I used to only do the month one, because I wanted that recurring revenue month by month just to help during slow times. We recently added in the annual one because some people really just wanted to pay annually. Okay. So just the free annual boiler maintenance, this boiler maintenance, we usually sell it for \$689. So just by signing up for our membership when we're there for this, when they call us for this, they can save \$90 on the spot. Right? And, then they get all these other benefits. So we end up selling a lot of these. Okay. And then I would just make sure and put in here the, credit card when it's gonna get billed for monthly and for annually. And then anything else you wanna include, we include if you cancel before twelve months of member payments, customer will be responsible to pay full price for any annual tune and clean that has been completed in the last twelve months. That's just to say, hey. You know, if you call us in two months and we already gave you a free annual boiler furnace maintenance, you're gonna have to pay for that maintenance. K? Because we gave it to you for free, and we can't afford to give everybody free maintenance. Okay? So this is what I would include for you guys who don't do heating or heating maintenance or anything like that. This is how I would do it. So description, your company members receive set all this same stuff premium 10% off discount labor and materials. VIP priority scheduling. It's a really easy one to do. Waive standard service diagnostic fees, and then free annual water heater maintenance. That's what I would do. I would do free annual water heater maintenance, and I would have a procedure for electric, gas, and on demand. Okay? So I

would do free maintenance on all three of those types of water heaters. And then I would include a free annual mainline drain jetting. Right? Even if you just go with a little jetter, like a little cart jetter or something, and you go to the house, you do a mainline drain jetting, poke your camera down there, make sure everything is good. That's super valuable to the customer. So now they're getting their water heater maintenance done. You can show them how that increases the life of their water heater and they're getting their mainline drain jetting done all for free. Right? And you can show them that by keeping up on this and inspecting it. Number one, you're going to stop issues from happening before they come into issue and you're going to keep it nice and clean and you're going to be constantly inspecting it. So if something does happen, you'll know before it starts backing up in their house. Okay. So super handy for the homeowner. Okay. Excuse me. And then pricing, we'll go over how to price it here in a minute. But here's the thing. So imagine you're going to use this. You have this membership set up. Here's how to use it for sales. Okay. So you can imagine like you go and they need a new electric water heater. Okay. So we on this side, we've got the good option. New electric water heater for \$3,489. Install new electric water heater includes all labor materials, one year parts and labor warranty. So they can do this, right, for \$34.89, or we can go new electric water heater with a membership for \$31.40. So we can save you \$349 right off the bat. Okay. We'll install the exact same electric water heater. It's going to include all the labor and materials. But because you signed up for our membership, as long as you stay a member with us, we will warranty this water heater for six years. Okay, so six year parts and labor warranty will do free annual maintenance on this water heater for the life of the water heater as long as you're a member with us. Plus, we'll give you 10% off all of our other services as long as you're a member with us. We'll give you priority VIP scheduling and we'll give you free annual mainline drain cleaning. All for less than the price of just a normal water heater. So you can see right there in that example, how that's a really powerful sales tool. Okay. So you can present it like this, but ideally you would give them like a good, better, best option. And then you would say, hey, plus if you sign up for our membership, we can give you 10% off of all of these options. Plus, we will, extend the warranty to match that of the water heater. Plus, you'll get free annual maintenance, 10% off all of our services, VIP scheduling, and a free annual mainline drain cleaning and camera inspection. Like you can see like how that's a really easy sales tool for your guys in the field to use. It's just something you have to train them on. Okay? So you want to create instances like this with your guys and train them on how to use the membership for sales. But this becomes like an offer, right? That's so good that you wouldn't want to refuse it. Like nobody else is going to go to their house and say, hey, I'll give it to you cheaper if you sign up for our membership, plus we'll warranty for six years, plus all these other benefits. Right? That's like an offer so good, you feel stupid saying no to it. And you'll find you're gonna sell a ton of these. Okay? Tons and tons and tons, and you're going to make tons and tons of money. So it's a really good sales tool. So how to price your membership? Okay. So you've got the cost of the service divided by how many months are in a year. Pretty simple math. But when you're figuring the cost of the service, want to figure your actual costs. So go back to your hourly rate calculator and look up your hourly expense rate and your that's what you're gonna put in here for labor. Okay? And then figure out how much you have in materials. Now just figure out the actual cost, like what it costs you to go to their house and to perform that maintenance. Okay? And that's what I would base the price off of my membership. Okay? So you take \$5.89 total costs. So my labor cost was

\$5.47, materials were 42 total cost of \$5.89 divided by 12 for a total cost of \$49. Okay. So that's why my membership is \$49. We just cover our costs going there and doing that. So we basically do the tune and clean it costs. But then I know that because I'm going to increase the lifetime value of my customer. And I also know that when my plumbers at their house looking at their plumbing, he's going to find other stuff to go fix. I'm going to make a ton of money with this. Plus the added business value. Right. So that is the gist of memberships. Okay. So they have tons of value. You need to do them. Now you understand how to put them together, how to use them as a sales tool, and how to price them. So go make it happen.

Service Titan Marketing Pro

All right. One thing that's gonna be available to you guys when you sign up with ServiceTitan is gonna be MarketingPro. Okay? And it's an add on that you have to pay extra for. And I think like at the time of this video, I think it's around \$900 just to add it into your service titan. And it seems expensive, but it's totally worth it. Okay? So I'm gonna go over like why it's totally worth it to begin with. What it does is it adds this extra marketing tab up here. You might have this marketing tab, but you might not have all this good stuff over here. Okay? So the first thing that it's going to allow you to do that's absolutely key to your business is review generation and reputation management. Okay. So you can see you click on review generation here and we have a survey going. So it's an SMS survey and it goes out when the job is completed and it just automatically goes out. Okay. And what this does, if we look at it here, this is a text message that anytime my guys complete a job, it sends the customer a text message as long as it's over our diagnostic fee. So our diagnostic fee is \$96. And if we just gave them a diagnostic fee, we don't send them a text message because that means they chose not to do work with us. So we send this out. Any job that gets completed, that's \$97 or more, they get sent this text message. Hey, customer name, prospect of plumbing here. How did Charles Brown do providing you with five star service? And this will actually be the technician's name that was out there. We would really appreciate it if you left us a review on Google. Review us on Google. Right? And this is how we do it. And we just added in this, how did Charles Brown do providing you with five star service? You also notice in the bios that we send, we say, you know, his favorite thing is to provide you with five star service or something like that. We're trying to prep their brain to give us a five star review. Okay? And so far it's been working really well for us. We've had a giant stack of all five star reviews. So you might wanna give that a try. Anyway, this like one key feature of being able to just ask for reviews every single time will keep those five star Google reviews coming in and really help you manage your Google My Business. Right? Because a one star review, like if they're mad at you, they're usually gonna go look you up on the Internet. They're gonna go find you, and they're gonna leave you a one star review. If they're super happy with your service and think you did an awesome job, they are not gonna go search you on Google and leave you a five star review. It's very unlikely. So you have to ask for the review. So we have our guys ask for the review. Okay. So when they're on-site and they're billing the customer, once they're all done, they say, hey, you're gonna get a text message for a review request. I would really appreciate it if you would leave me a review. Okay? So you can train your guys to say that. We also hand out \$5 coffee gift cards, k, to a local coffee shop. And we tell the customer when we're leaving, here's a actually, these are \$10 gift cards. Here's a \$10 gift card to a coffee shop. Thanks for doing business with us. We really

appreciate you. Remember, leave me that review. Okay? If you can get your technicians to do that, then you will get a lot more reviews and you have to protect your Google reviews. And so this is just a way that you can do it. And just this alone is worth the \$900 they want for this service. Okay? So that's the first thing that this does that is awesome, makes it 100% worth what you pay for it. The second thing that it does that is really, really cool is email campaigns. Okay? So if you click on pro campaigns here so I've got another email campaign that sends out a review request on email as well. So we bug them for a couple days with email. So if they don't respond to the text, hopefully the next day they log in their email and they get another review request there. Okay. Actually, before I show you guys the rest of my email campaigns, this is also a very cool thing here is you can go to reputation monitoring and it will actually tell you last seven days. See, we've gotten all five star of the last seven. And you can kind of get a trend of what's going on, who got the five star reviews, all that good kind of stuff. And then you can actually look at your reviews. Okay? And you can respond to your reviews here, and it will tell you who got the review. K? And it will verify them for you, and your c then you don't have to give your CSRs access to your GMB to respond to your reviews. You still do to respond to your messages, but this is just one more thing they can do right on service time. Okay? And you want them to jump on these and you wanna respond to every single review. And so you can see since we started prepping them for five star service, we've been getting five star reviews for a while except for Yelp and Facebook. But all our Googles have been five stars for the last, like, three months. We haven't gotten a single one star. Knock on wood. Right? Okay. So let's go back to these email campaigns because this is really cool. Okay. So let's find a couple that we do that are awesome. Okay. Here's one, unsold estimates. So anytime we leave a job and we have an unsold estimate and it's over \$2,000, we send them an email reminding them that we offer financing. Okay? And let's see here. See if I can show you guys what this email looks like. So we send them two emails. One right the second my guy leaves the job, if he completes the job in ServiceTitan and that estimate is in there still, they get sent this email. Okay? And you can see last thirty days, four people have clicked it, which means they were interested in financing. Let's go let's look at last year. Yeah, let's look at last year. Let's go 01/01/2022 to 12/31/2022. So you can see this one email campaign brought in \$229,000 last year alone. K? So totally worth just this one email campaign worth marketing pro. K? And I'm gonna go over how to build these later and give you guys the what's in each of my campaigns. But let's go check about let's go check out another one. There's one in here that just absolutely kills it for me. Good thing is you can send out a thank you email. If you've got members and you offer a free service, you can send out reminders for them to book that. Invoice due, you know, if you get people that aren't paying, you can send them a series of emails and get them to pay just by having an automated email. But here's the one that absolutely kills it for us. Okay? And we'll go over a custom date range again. Let's do last year again, 01/2022. You can see here this one brought us in \$713,000 last year. Okay, January to December for a \$900 a month program. We're we're not even at \$12 for the year, and it brings in this much money. Totally worth it. Okay. So anytime that we have an unsold estimate, we send them this campaign. Okay. Just reminding them about their estimate because they might go get, you know, different quotes. They might, you know, not wanna do the work right now, and they will find these emails and they will open them up and they will call you and they will book that job and you will sell a lot more work. Okay? So my point here is like, you need to get marketing pro. Okay? Because it's gonna be totally worth it. And I'm gonna go in the

next video. We're gonna go over automating these campaigns and setting them up so that you guys can get these exact same email campaigns set up. So if you can afford it, go get it. If you're doing any work at all, right? Even if you're doing 1,000,000 a year and this makes you one fifth of this, it's gonna pay for service type and marketing pro. So I would recommend getting it and making this stuff happen. See you guys.

Marketing Pro Email Automations

So like we talked about before, one of the best parts of service type marketing pro is the ability to automatically have emails go out. Okay. So you can schedule these, you can build them and you can automate them and they can help you make money and help you get reviews. Okay? So in this video, we're just gonna go over the different email campaigns that I've been using in my business. I'll show you how many reviews they generate, how much money I've made off of them. And then you're also gonna have in the description down below, you will have a Google Doc for each, campaign that I am currently running. K? That way you can come in here and you can see, okay. This is the review generation campaign. The audience looks like, you know, completed job \$97 and more. And here's what email one looks like. Here's the subject. Here's the pre header. And then here's the meat and potatoes of the email. And then if you scroll down, you can see here email two. Okay. Here's the subject. Here's the preheader, and here is the meat and potatoes of the email. When you sign up for service starting marketing pro, you should get access to somebody to help you set these all up. And whether they set them up, you know, with the proper, you know, wordage in there or verbiage in there, that's okay. As long as they just help you get them set up with the right audience and then you can go in and change the verbiage. That would be ideal. So if you signed up, make sure you get somebody to from service time to help you set these up, and they might even have some tips and tricks to make them better than mine. K? Because I set all these up on my own. So here's the first email campaign that I do. It's called a review request. And I thought, well, we're texting them for reviews and we get reviews. So what if we email them? Can we get more reviews? So we email them, twice and ask for a review over email. Okay? And you can see over the last thirty days, I've only had this running for like two months. We've sent 89 of these and it's actually made us money. So it's actually brought in \$2,400 in money, and we've had nine people click it and go to Google to leave us a review. Now whether or not they actually left us a review, I don't know. But chances are high that out of those, you know, nine people, if one of them left a review, then that's 12 reviews a year. And this is all automated. I set it up once and off we go. 12 more reviews. So to me, totally worth it. Plus it brought in some money. Okay. So that's the first one is, review request. So let's go find another one. We'll just go down the list here. Here's the unsold estimates over 2,000. We offer financing. Okay. So this is just reminding our customers, hey, you know, we saw you had an estimate left behind. You know, we offer financing. So we have our guys, we train them to offer financing to the customers, but if they forget or if the customer forgets afterwards, this is just a quick reminder like, hey guys, we offer financing. So let's check this one. Let's just do year to date. This one has made me \$93,000 year to date and it is the May. Okay. This will likely make me around \$400,000 this year. Okay? Totally worth it. And it's just a simple email sequence. So we've got email one, just in case we offer financing. Customer name, customer name, we have a secret for you. Learn more about our number one plumbing secret. Nobody's ever open to that one. So they all open this first one. But still, \$400,000 just for having this one email sequence in

place, I'll take it all day long. Set it up once, remind them about your financing, and off you go. Okay? So let's go find another one. You can see I've tried lots of different email automations. Here's a thank you email that goes out to all of our customers. K? So let's check out year to date. Revenue, 18,000 or 17,000 17,700.0. K? And this is just by saying thank you. So saying thank you goes a long ways, and it's just one email. Okay? 10% off your next service. Thank you. Our gift to you is 10% off your next service. See details. You can see we've got a pretty good, open rate, 50%. And like I said, automate it, make \$18. Can't go wrong. So let's go back to campaigns, and let's see here. Member Tune and Clean reminder. So part of our membership is a Tune and Clean, and, that's on their, like, heating system. So the heating systems we run are oil, and they get really dirty, and you gotta clean them every year. So part of our membership is you pay us \$49 a month, and we come and tune your boiler for free every single year. People love it. We've got I think we just passed, like, 1,200 members at \$49 a month. I think it's around 700,000 a year in recurring revenue, which is pretty cool. So at the beginning of the month, I think we're getting a little over \$50 deposited at the beginning of the month. K? And we're gonna go over memberships. Maybe we have already, but, this campaign just reminds them, hey, it's been, you know, a year or eleven months since your last Tune and Clean. It's time to get your next one scheduled. Okay? That way they schedule us to come out and do it. And then we go out and we do the tune and clean, and we hopefully find some other work that needs fixed, and we make more money. K? So you can see just this year, year to date, and it's not even tune and clean season. We've already made 10 k this year, which is pretty good. So and it's just a quick couple emails. Email one, annual tune and clean due soon. It's been a year since your annual maintenance. Don't forget to schedule your next annual tune and clean. Email two, don't forget to schedule your annual tune and clean. It's been a year since your last maintenance. Don't forget to schedule your annual tune and clean. Right? So two emails already made us \$10 this year. This will likely make us probably a hundred grand this year because once we get into tune and clean season, there's a season for it. This will start cranking us some some money. Okay? So let's go back to pro campaigns. And let's see. We covered that one. This is the same email we send out. If you're not a member and we did a tune and clean on your boiler, we send out another email that's identical to our member one that says, hey. It's been a year since your tune and clean. You're due for another one. Let's get it on the schedule. Invoice due. So you can see year to date. This one has brought in \$93,000. K? So this is people who they couldn't get their bill because they weren't there when my technicians were there. My technicians couldn't collect payment. And they got this email and they gave us a call and they paid their bill. Okay? So you can see if we didn't have this and we missed out on 93,000, we'd be hurting. Okay? This is just a series of a few emails. I think it's seven, you know, just saying, hey. Your payment's due. Payment is due. You can pay on online. Payment is due. Payment is due. Payment is due. Payment is due. Payment is due. It just keeps going. 12 emails. K? Just trying to get them to pay their bill. And this one I set up a long time ago, and it has saved our butt. K? A lot of people will pay their bill if you email them often enough, so I highly recommend that. Let's keep going. Pro campaigns, page three. This is my favorite one right here. So this is unsold estimate. Anybody who we give an estimate to and it doesn't get marked as sold gets a series of emails reminding them about their estimate. And you can say this this year, hundred and twenty grand just this year. And I think last year, this brought us in 770,000 or something like that. K? So it'll probably bring us in a lot more, revenue than this. I wanna say it's down this year because

we've gotten a lot better at actually selling the work on the job just by training our guys. Okay? And so this is just a series of emails. Hey. Here's your estimate. Don't forget about it. Just following up on this. Hello. It's us again. Our gift to you, 10% off your email. Four emails, all seven days apart. Super simple to set up, brings in a ton of money. So I would highly recommend it. And again, that's all of our email campaigns. I would suggest you guys go get each one of these set up, have ServiceTitan help you set up your email campaigns. Sometimes your marketing company can help you set these up as well. And then check out the Google docs down below because we're gonna have each one of these broken up so that you can just copy them into your service titan and make your email campaigns. See you guys.

Google

Google Workspace

Hey, guys. Welcome to Google Workspace. Okay. This is a really good tool to manage your company emails. So what you do is you sign up and you link your domain to it. Sometimes you need to get the help of your marketing company. Think they have to put some code in the head section of your website, but, then you can run all your domains through here and all your emails through here and it gives you that professional look. So you'll have like, like mine is jaredprospectorplumbing dot com And all my guys have their own email. Okay? And that's how I would do it. I would get everybody their own email. And then on their iPad, I would have them download the Gmail app and log into their own email. And then any emails they send, they can send from that email. And then if you use that email in ServiceTitan, then anything they do through ServiceTitan will have that email on there as well. Okay? So, I would just go get it. If you Google, you know, Google Workspace, then you can sign up for an account, then you can talk to your marketing company to get your domain linked. And the best part is you can come in here and you can see users. You know? We've got 17 users in here. These are all the people in my company currently. Some of these we could probably get rid of. All of our main emails, they all go to infoprospectorplumbing.com. Both of our CSRs have access to that. So any forms that get filled out on our website or anything like that, they all go to infoprospector. So they both both our CSRs watch that real carefully. And then the other one is I have an office at prospectorplumbing.com, and that's where all of our drive information lives. So all of our documents, everything for our business lives on office at prospectorplumbing.com's drive. K? And we'll go over all the drive stuff in another class. But basically, you can come in here and you can add users and you can delete users and you can just have first name at your company. And it just makes you look really professional. So go get on Google Workspace and get some good emails going, get some good pictures for their emails, and set your guys up for success.

Google Drive

Alright, guys. Welcome to Google Drive. Okay. So one good way to keep all of your stuff in one spot and to be able to share it between your team members is to keep everything on Google Drive. Now once you set up your emails, I would set up one email where all of your stuff lives. K? And I would make that an email that only you have access to. And then you

can go in maybe you and your GM, and then you can go in and you can share the appropriate stuff with the appropriate people. Okay? So all of your drives or all of your documents and everything can live in Google Drive. Okay? So like me, we use office@prospectorplumbing.com. Me and my general manager, actually, I'm the only one that has access to it, and then I just share the appropriate folders with him. Okay? So your yours is gonna be blank when you first log in. And all you do to get there is make sure you're logged in to the email, the proper email, come up here to these numbers up here and click on drive. And that will take you to your drive. Okay? And then I would create folders for all the different parts of your business. Right? We've got licensing, MSDS sheets, new hire documents, tax documents, social posts, SOPs, time cards, time off request forms, union stuff, you know, all of our vans and equipment and assets and things like that. So you're gonna wanna create folders for all your different stuff. And all you do is come over here and click new and you can do new folder. K? And then you can create the folder. And then once you're in the folder, you know, then you can create folders and folders, and it really just helps keep your stuff organized. K? And, like, you can see here so, these, I should probably transfer over to my ownership. K? We just got these new vans. My general manager updated and created these folders in here. Now he needs to transfer them over to my ownership. That way I have control over them. K? So then you're gonna wanna share these with people. So if you click on it, you can click share, and then you can start sharing this with certain people in your team. K? You would just add their email up here and then click done. Or you can share it with anybody with a link. So you can select this to restricted, like if you don't have shared access, if your email isn't up here, you can't see it. Or you can come down here and say, anyone with this link to this folder can view it. K? And then you can select what kind of access they're gonna have. Are they gonna be able to just view it? Are they gonna be able to comment on it? Or are they gonna be able to edit it? And so some of these, like, I don't mind these people coming in here and editing. This is my CSR, my main CSR, and this is my general manager. So that I gave them editor access. Right? That way they can go in there and make changes as needed. So that's just up to you, like, what you're what kind of information you're sharing. Do you want it to be changeable, fixable, you know, movable? And then depending on who it is, what kind of access you would give them. Okay? So this is very much like keeping folders on your computer. But, you know, if your computer dies and all your stuff is on your computer, then you're in a bad spot. Right? So by keeping it on drive, it's all up in the cloud. And no matter what, you'll always have access to it as long as you can log in to your Gmail account. Okay? So this is a really great way to do that. One other thing, like, if you need to we'll just go to van registrations. So if you come in here, you can now go file upload and you can upload a file from your computer. Right? You can also come in here and let's say you want a Google document that lives in this folder. If you come to the folder first, then you can create a Google Doc or a Google Sheet or Google Slide or all sorts of Google stuff, and it will create that in here. It'll pop open a new window. Let's just do one real quick. If you create and share, see it pops it open in a new window. And if we label this document test doc and we go back over here. Now we have test doc, and it's living in this folder. K? So now it's always in that folder. If you accidentally make a document in a in the wrong folder, you can right click on this and you can move it. So we can move this folder. We can go current location is in Vans. Well, let I wanna put it in, you know, prospect or plumbing. I wanna put it in bonding and insurance, and I wanna move it here. K? And then you would click move, and it would move that document to the right folder. So use this,

stay organized, keep it neat, make sure your team knows to keep it neat, and just use it to, keep all your stuff in order.

Google Sheets & Docs

Alright, guys. One awesome resource for your plumbing business is Google Sheets and Google Docs. K? So you need to learn how to use them proficiently. And I'm not gonna go over how to do that because there's tons of free resources on YouTube that will teach you how to use Google sheets and how to use Google docs. I'm just here to show you where it is and how to get to it. Okay? And why and that you should be using it. Okay? So you can see I've got Google sheets tabbed up here on my browser. I've got Google docs up here because I use it all the time. Okay. If you don't have it up there, all you do is go to Google, click these buttons up here. You can do this from your email account as well. And come down here until you find them. There's Google Sheets. There's Google Docs. K? So let's go to Google Sheets. To create a new one, you click blank. There's all sorts of pre made stuff that you can look up as well if you just search it up here. You can also search for documents that you've created. And you can see I use this like crazy, k, for all sorts of stuff. Like it is the it is one of the most valuable tools in your arsenal, and it's totally free. K? So definitely get on it, figure out how to use it, learn how to use it, run calculations like all my spreadsheets, anything we track, anything we need to auto sum or auto tally, it is all on Google Sheets, so you need to get comfortable with it. Now let's take a look at Google Docs. It's gonna be very similar. This is basically like Word document. Right? So you can see here, like, all of the stuff that I've made for this course has all been on Google Docs. K? Any contracts I ever make, any free stuff I ever make, any document I ever make, all of our SOPs, all of that stuff, it's all on Google Docs. K? So moral of the story is if you don't know how to use Google Docs or Google Sheets, start using them. And then anytime you find yourself needing a spreadsheet or needing a Google Doc, go make it on Google Docs and on Google Sheets, and then make sure your stuff all lives in the appropriate folders in your Google Drive that we talked about in the last video. Okay? And that'll just help you stay organized. It'll help you know where everything is and your life will be so much easier if you can do that.

Canva

Intro to Canva

Alright, guys. Welcome to Canva. K? This is a super cool program that's super cheap, that's very easy to use, that you can use for all sorts of stuff in your business. K? You can make any of your social media posts. You can make your ads. You can create presentations. And specifically what I want you to use it for is creating your images for your price book. Okay? So I'm just gonna go over like some real quick things that you can do in Canva and easy ways to use it. Yeah. So this is your homepage. So any design you make is gonna end up on your homepage. You can see I use this for like everything. K? To create a new design, then you're gonna wanna click on create a design. And you can see you can create a document, a whiteboard, a presentation. You can even present that presentation and record yourself presenting it. You can make an Instagram post, an Instagram story, Facebook post, YouTube banner, YouTube thumbnail, like the list just goes on. Okay? So there's that. And then you can also create a custom size. So if like if you're in a program and you need an image to be a

custom size and it tells you it needs to be like 350 pixels by 417 pixels, you can click custom size and you can actually enter in the pixel width and the pixel height and create the right image for the application you're using. Okay? So let's just go create a new Instagram post. So this is the one that I use for all my Facebook and Instagram posts because you can post this square. You can post it to Facebook, Instagram, and LinkedIn, and your Google My Business. K? So like my business Plum Social, that's what we do. We take these square photos and we post them across all platforms, and that's how we get the efficiency of what we do. Okay. So a couple things. You have a square blank canvas. You can click in here. You can change the background color, okay, to any color you want. One cool thing you can do is if you come to over here well, let's see. Let's do this first. If you go to uploads, you can upload a file and you can upload a file off of your computer so you can get all your logos uploaded in here. And once you upload your logos, the cool part is if you take your logo, there's my logo, and you put it on this image, you can then come over here and it will tell you which colors are in that logo. So now you can change the background to a color that matches your logo. There's the navy blue. There's the white we use. So that's a super cool thing to do. K? And then another cool thing is let's say you want to just make a quick social media design. You can come in here to designs and they have templates. You can click review. And here's a bunch of review templates that you could use for your business. K? So, like, you could pop this on here and you can change the text. You could give her the visitor, whatever. Right? Here's another one. Like, you could use this and then come in here and change the colors for your logo. K? So really good for making social media. Let's just delete all that. We'll start with a blank one here. Another cool thing is if you upload photos of yourself or of your team, let's just take this one of me here. Now let's say I wanna get rid of the background. You can come in here and you have all sorts of options. Okay? You can do background remover. You can do magic eraser where it'll erase something you don't want in the image. You can do a magic edit where you can like change out the flower. Let's do a background remover. There you go. And then you can also come in here and you can adjust, like, temperature of the image, tint of the image, all sorts of stuff, brightness of the image, contrast of the image. K? And you can just play with how you want this image to look. And then you can always crop this image just by dragging. You can make this image bigger or smaller just by dragging around. You can move this around wherever you want. Super cool. And then you can come in here and you can add text as well. So they've got three defaults of these texts. So you can add this text, this text, or this text. K? Make it so you guys can see those. And then you can come in here and you can edit these. Right? You can change the style of text. There's a bunch of different styles. You can change the size of the text by changing this or by changing this. You can come in here and change the color of the text, and then you can do all these different things to the text up here as well. Okay? There's also all these premade text options down here, so you can add in any of these that you want. And they don't have to continue to say shine, shine, shine. You could come in here and say, no. No. Right? You can also change the color of these as well. Like, let's say you want that to be more of a purple. Right? There you go. All sorts of cool stuff you can do in here. You can draw with markers so you can add in your signature if you want. Right? You can do all sorts of cool stuff. So just a cool program in general. So go get it. I think you can get the pro version for like \$12 a month. It's totally worth it. You can do so much stuff with this. It's gonna be ridiculous. So just go grab it. And then we're also gonna go over how to use this to build out, your price book in ServiceTitan. So in the next video, I'm gonna go over what size

image to select and how to actually create the images for your price book for ServiceTitan. See you there.

How To Service Titan Pricebook Photos

Alright, guys. When you're building your price book, you're going to need to put images in. So I'm going to teach you how to make those images in Canva, and show you how to do it. So basically here in your categories, you know, you're gonna have these images here where you're need to upload an image. And then when you're doing your services, basically each service, k, if you edit the service in here down at the very bottom, you're gonna see an image here. You can upload multiple images, or you can do videos as well. So some of my stuff like some water heaters, we put in a video about the water heater so you guys can show that to the customer. You can also do, you know, PDFs or anything that you can get from the supplier. You can put that stuff in there as well. So let's go back to Canva and I will show you how to make these images. Okay? So this is Canva here. If you go up here to the top right, go to Instagram post square. That's the best size image to use. And then let's say we wanted a, one for a water heater. Okay? So I would go to Google and I would just search water heater, maybe we'll say electric because it's recognizable. You can go to images. You can find an image that you like of a water heater. K? So maybe you like this one. I don't know. Just pick one. You can find one that you like. Let's find one. Let's use this one. I don't know why. I hate Whirlpool water heaters, but here we go. So what I would do is I would right click on this and I would open image in new tab. This only works in Google Chrome. And then if you're on a Mac, you would hit command shift four. If you're on a PC, would hit control s. And what that does is it takes a snapshot. Okay. So I just hit command shift four. And then on a Mac, if you hold control, you can take a snapshot. So you can just snapshot this picture. K? Rather than having to download it. Then you can go back over to Canva and you can hit command v on a Mac or control v on a PC. K? And it'll paste the picture in. Now this photo has a white background. So what we're gonna wanna do is we're gonna wanna remove the background on it because when we download this, we're gonna do it with a transparent background. Okay? So I would take this photo. I would remove the background. And that way anything you put close to the photo can still have, you know, white background or doesn't mess with it. And I'll show you what I mean. So now we've got this completely cleared out with a white background. You can add your logo in here if you want. It's kinda up to you. I think it looks kinda cool when you do that. If everything kinda has your logo on it, you know, put it down here in the corner somewhere. Maybe right here. I think service type will cut off the a little bit of the top and a little bit of the bottom, so you might have to play with the placement of this. But, yeah, there you go. So now you can see here because this has a clear background, now I can move stuff closer to it and it doesn't matter. Right? Whereas before, this could be behind. If you have a problem like, you know, if you end up where this is like that, you can take this layer and you can just move it backwards. Okay? Or you could take this layer and move it backwards or forwards as well. K? So that's how you do that. Another cool one that I like to do would be like for mine, you know, I split it up by room. I'm guessing you guys did something similar. You can just go back to Google and you can just Google a room like bathroom. And you can just find a bathroom that you think looks good that represents a bathroom to you and to your guys. Maybe you like this photo again. Open image in new tab. That opens it up in a new tab. And then I'm gonna hit command shift four, control s on a PC. I'm just gonna take a snapshot of

this. K? I'm gonna hold control. I'm gonna go back to my design. I'm gonna hit command v. And then you can simply make this so it covers the whole screen. Maybe you wanna go a little bigger and move it up like this. Okay. And that's what I would probably use for my bathroom tab, my bathroom category. Okay. Another cool thing you can do is, like, when you're doing, you know, like, elements or a water heater rebuild. Right? Let's do that one. That'd be a good one. You could do water heater elements. I would find a picture of an element that you like. So How about that one? Yep. Looks nice and clear. I would open image in new tab. Command shift four on a Mac, control s on a PC, grab that guy, go back over my design, hit command v, and then I would remove the background on this. That way it's got no white background. And I would shrink it down to size, And I would command c this and command v it to make another copy. So command c is copy or control v on a PC. And I would just wanna show that you're gonna get two of them. Okay? So you get two elements. And then maybe with that task, also get a water heater thermostat. So I'd find a picture that I like. This one's got both of them, so that's a good one. So let's open this. Open image in new tab and command shift four, hold control if you're on a Mac, grab these guys, and then I would throw them in here. Boom. Now resize them so they make sense. Alright. Alright. And maybe I want these to show up differently. I would command c for copy this one, then command v to paste the other one, and then I would make it show this other one. Look at that. Bam. And maybe in here you want, you know, maybe you got maybe you want a just little line we got here. Let's see if we can get rid of that. Maybe you want an expansion tank in here. Maybe you're gonna include that in the task. So let's go to an expansion tank. Right? And then we're just gonna find one that we like, like Everbilt. There we go. There's an Amtrol one. So let's open this. Can't open image in new tabs, so maybe I'll just grab a snapshot of it right here. And then you can see go back into Canva, command v. I'm gonna move remove the background on this so that I can place it closer to all my stuff. And I'm gonna resize it and maybe put it up here. So you can see how you can like put multiple items. Right? And that just helps your guys know what's going on. Okay. It's a water heater rebuild. Looks like they get two elements, two thermostats, and an expansion tank. Maybe you wanna throw a relief valve in here as well. K? And then when you go to download these so we've got three different examples here. When you go to download these, you come up here to share, download. And then because we built three pages, we can select which page we want to download. But let's do this one, for example. I wanna download this with a transparent background so that it's not white. And what service title do is it'll put a white faded background behind it to look really nice. K? So then you're gonna go ahead and download that. And what I would recommend that you do is I would recommend that you go to, Google Drive. You get Google Drive on your computer. I would recommend that you create a shared drive that is called your price book. K? And then I would create folders for all of your categories. K? And then I would put create folders for all of your services as well, maybe. And then I would put these photos in the appropriate folder so that you always know where they live. For the purposes of this video, I'm just gonna put it on my desktop. K? And then we'll we'll upload it from there. So let's call this water heater rebuild test. K? So let's go back to service titan. I'm just gonna do it in my categories real quick. Let's move this out of the way. And I'm gonna just build a random category so that I can put this photo in there. So when we go to upload, I can go find that photo from my desktop. Oh gosh, I got a lot of photos. Water heater rebuild test. Okay. Bam. And there it is. And then you can save that and that will be your photo there. That's how that works, guys. So if you don't know

how to use Google Drive, go watch the Google Drive section up top. That's how you use Canva to make your photos. Super easy. Anybody can do it. Make it happen. See you guys.