ServiceTitan®

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Accounting APIs

Invoices

Invoices detail where the work was performed, the customer the work was performed for, what work was performed, or what goods were sold, as well as how much the customer has agreed to pay. ServiceTitan also provides other details like general ledger account mapping.

Job invoices—The most common type of invoice in ServiceTitan. A job invoice is generated the moment a job is booked. Job invoice details are added by a technician using the ServiceTitan mobile app or by an office employee. Job invoices details can transfer from estimates that have been sold and converted to a job.

Membership invoices—Membership invoices details the actions taken on a membership. A membership invoice is dependent on what is agreed to in a membership and where in the life of the membership a user is taking the action. Membership invoice types include:

- Sales invoice—Records the sale of a membership and activates the membership.

- Billing invoice—Records the recurring subscription charge for a membership. For example, a monthly payment on a 12-month membership.

- Service invoice—Records the work performed by a technician as part of the membership agreement.

- Balance cancellation invoice—Records the unperformed work that is no longer expected to be completed. Balance cancellation invoices are not refunding the customer for any money collected for the membership. This type of invoice is generated when a membership expires or when a customer cancels services.

- Refund invoice—Records the unperformed work that is no longer expected to be completed. Refund invoices are refunding the customer for

money collected for the membership. This type of invoice is generated when a membership expires or when a customer cancels services.

Point of sale invoice—Record sales made from within the business and carry no association to a service location or a job.

Project invoice—Used to charge a customer for work performed across multiple jobs at the same location. Project invoices are often sent out at different points during a project.

Financing invoice—Used to record work performed for a customer when a different party is responsible for payment. Financing invoices consist of two invoices:

- One records the work performed by a technician at a specific location

- The second transfers the balance owed to the party responsible for payment

Refund invoice—Write off revenue and return the payment that was previously recorded by another invoice.

Balance write-off invoice—Clear outstanding balances on an existing invoice where it's no longer expected for the customer to pay.

High level use cases for these APIs:

- All invoice types can be requested from the same API endpoint. However, the information returned may vary depending on the workflow the invoice type relates to.

- Get, create, and update invoices and invoice details

- In some circumstances, users can delete certain invoice details.

Payments

Payment details include basic information like payment method, the invoice the payment is applied to, and how much the customer is paying. ServiceTitan also provides other details like general ledger (GL) account mapping.

Due on receipt payments—A payment collected at the same time work is performed. The invoice these payments are applied to typically have no term applied or a term similar to Due Upon Receipt.

Membership billing payments—A payment collected at the same time a membership billing invoice is generated in the office. Memberships must be configured to generate membership payments and customer payment information, such as credit card information, must be stored in ServiceTitan.

Term payments—A payment collected from the customer after work was completed. These payments carry term conditions such as when payment is

due. These payments can be recorded by an office user, or via statements that were sent to the customer.

Deposits—A payment collected from a customer before work is done.

Unapplied payments—A payment collected from a customer that has not yet been applied to an invoice.

Multi-invoice payments—A payment collected from a customer that is then applied to more than one invoice.

Refund payments—A payment where money is given back to a customer after it was collected. Refund payments are used to capture actions like refunding for a price adjustment, refunding due to an escalation, or refunding an overpayment balance.

High level use cases for these APIs:

- All payment types can be requested from the same API endpoint. However, the information returned may vary depending on the workflow the payment type relates to.

- Get, create, and update payments and payment details.

Payment terms

Payment terms are agreements between a customer and vendor in regards to how payment is made. Payment terms can be attached to invoices and bills to notify both the business and the customer when payment is due.

High level use cases for these APIs:

- Query payment terms details

    - Creation of any new payment term must be done in ServiceTitan

    - Payment term details will appear in the response when an invoice or bill transaction is queries

Bills

A document listing the amounts owed to a supplier by the recipient is known as a vendor invoice. A supplier prepares and issues an invoice when a customer orders goods and services on credit.

Vendor invoices include the amounts owed, sales taxes, freight and delivery charges, the date by which the payment should be made, and where to send the payment.

Things to know:

- Bills are commonly tied directly to a purchase order and are generated when items on the purchase order are received

- Bills cannot be updated through API. The corresponding purchase order can be updated, which will result in a new bill reflecting the changes

High-level use case for these APIs:

- Retrieve information about bills

Tax Zones

Details of a tax zone vary by the location of customers, as well as the types of work a business offers.Tax zones are commonly added to a customer location, then automatically added to the invoice.

High level use cases for these APIs:

- Query tax zone details like the name of the tax zone and the tax rate

    - Creation of any new tax zones must be done in ServiceTitan

    - Tax zone details will appear in the response when an invoice transaction is queried