Training
Technician 101

Objectives

By the end of this session, you should confidently be able to:

- Use the main dashboard in ServiceTitan Mobile
- Know how to sync your Pricebook and update changes
- Prepare for a job
- Build estimates
- Sell estimates and have the customer sign to authorize the work
- Finalize the invoice
- Have the customer sign off on the final invoice
- Collect customer payment

Goals

My goals for this session are:

____

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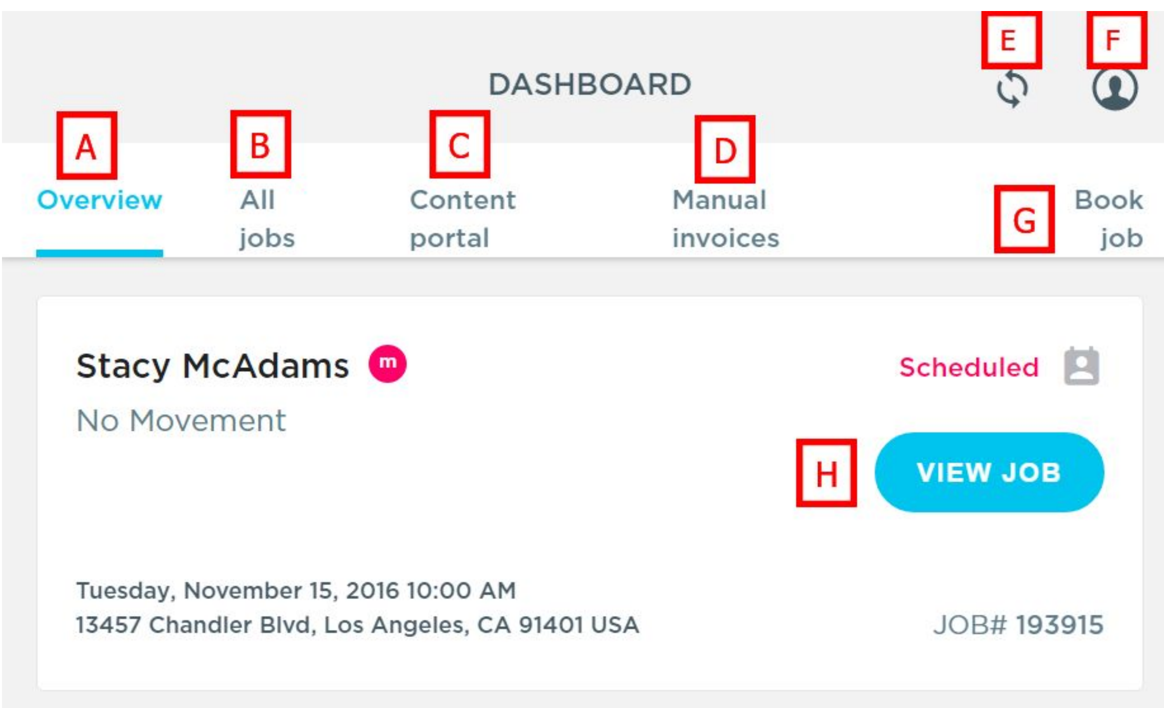
Table of Contents

Basics of ServiceTitan Mobile

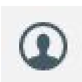
ServiceTitan Mobile Dashboard

Describe the main items on the Mobile dashboard:

A (Overview)	______________	B (All jobs)	______________
C (Content portal)	______________	D (Manual Invoices)	______________
E (Refresh)	______________	F (Profile icon)	______________
G (Book job)	______________	H (View Job)	______________



ServiceTitan Mobile Tips

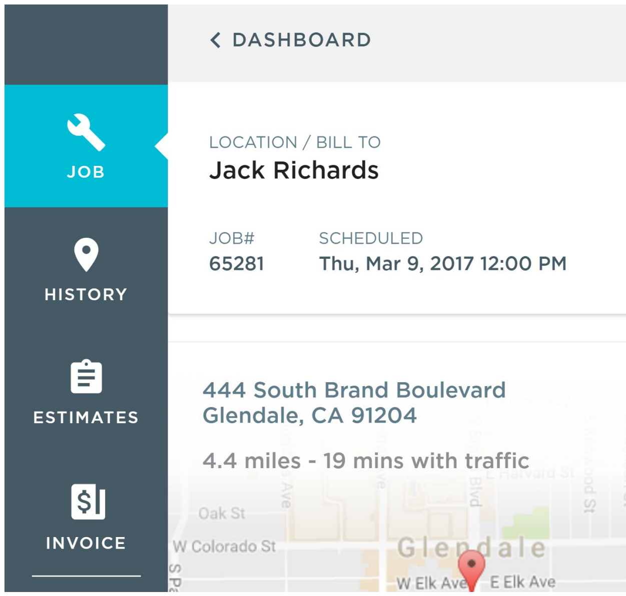
Commonly Used Buttons	What does this button do?
 *(top right corner)*	
 *(top right corner)*	
 *(top of the **Job** screen)*	
 *(bottom left of the keyboard)*	

✪ BONUS: How do you *close/hide* the keyboard? (Circle all that apply)

a) Tap anywhere outside the keyboard. The keyboard will automatically close.
b) You can't close the keyboard. You need to wait until it closes on its own.
c) Tap the **Hide Keyboard** icon , located at the bottom right of the keyboard.

Notes:

Job Basics



Why don't **Forms** appear on the screen above?

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Which actions are you *allowed* to do **before you arrive at a job site?**
(Circle all that apply)

 Look at the customer history	 Listen to call recordings (*if your company policy allows this*)
 Review tags	 Review pinned notes

Navigating the Job Screen

Job Action Button

The job action button is found on the main **Job** screen. Depending on your company's process, the job action button will say **Dispatch, Arrive,** or **Done For Now** when you open the **Job** screen.

Job Action	When do I tap here?
DISPATCH	
ARRIVE	
DONE FOR NOW	

Job Menu

Take a moment to familiarize yourself with the navigation menu on the **Job** screen. Note: A cheat sheet will be available below.

JOB	ESTIMATES	
HISTORY	INVOICE	*In the next two sections we'll go over what each of these buttons does.*
FORMS		

The Job Process

Write down the button you would tap to perform each action. Space is provided if you'd like to write down additional notes/instructions. Note: If your company or team does not use this feature or process, mark it in notes or cross this off.

A. Prepare for the job	**Where do I go?**	**Additional Notes / Instructions**
Look up previous invoices or estimates for the customer		
Listen to call recordings		
Review job tags		
Review pinned notes		
Access projects related to the job site		
Contact the customer		
Get directions to the job site		
Fill out forms		
B. Sell Estimates	**Where do I go?**	**Additional Notes / Instructions**
Create new estimate		
Access a recommended estimate		
Present estimates to the customer		
Get the customer to sign off on the work		

Review forms with the customer		
Take or upload a picture/video		
Add a note to the job		
C. Complete the job	**Where do I go?**	**Additional Notes / Instructions**
Add materials to the invoice		
Add or remove items from the invoice		
Mark a recurring service as completed		
Add a PO to the job		
Find out if there are signatures or forms still required to complete the job		
Get the customer to sign the final invoice		
Collect payment		

Notes:

ServiceTitan Mobile Cheat Sheet

Use this template if you'd like to create your own cheat sheet. Using the chart above, write down at least 1-2 of the most important actions each button allows you to do. Feel free to add notes of your own.

Button	Actions
	
	
	
	
	
	
	

Calling a Customer

How do you call a customer? (Circle the correct steps below)

Step One

Circle the correct step below:

Dial the customer's number from your phone.

Which one is correct?

*Tap **Customer Details** from the main job screen.*

CUSTOMER DETAILS >

Step Two

Circle the correct step below:

The customer will call you.

Which one is correct?

*Tap **Call** next to the number you'd like to call.*

Bill-to home phone 8186601192 CALL

Location home phone 8186601192 CALL

*You will be asked to confirm. Tap **Call** again.*

Step Three

Circle the correct step below:

Your phone will ring. When you pick up, you'll be connected to the customer.

Which one is correct?

More Features

Forms

Where can you go to see ***required*** forms that need to be completed for the ***current*** *job*? (Circle all that apply)

What happens when you tap the **Star** next to a form question?

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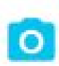
What happens when you tap the **Camera** next to a form question?



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What happens when you tap the **Pencil** next to a form question?

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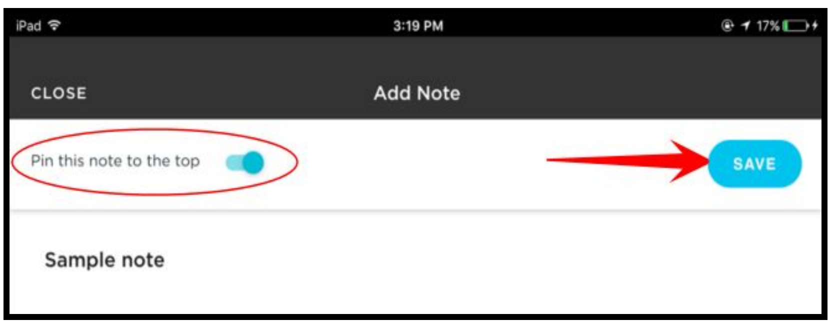
Notes:

Adding Pictures and Notes

Where do you tap to **add a note** to the job? ______________________________

Where do you tap to **add a photo or video** to the job? _______________________

Why might you select *Pin this note to the top* before saving a note?



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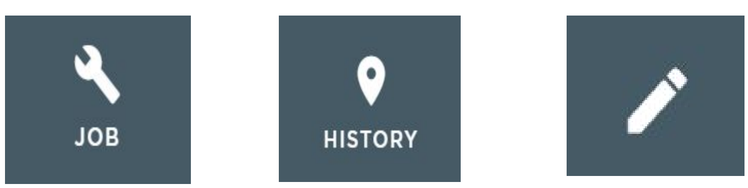
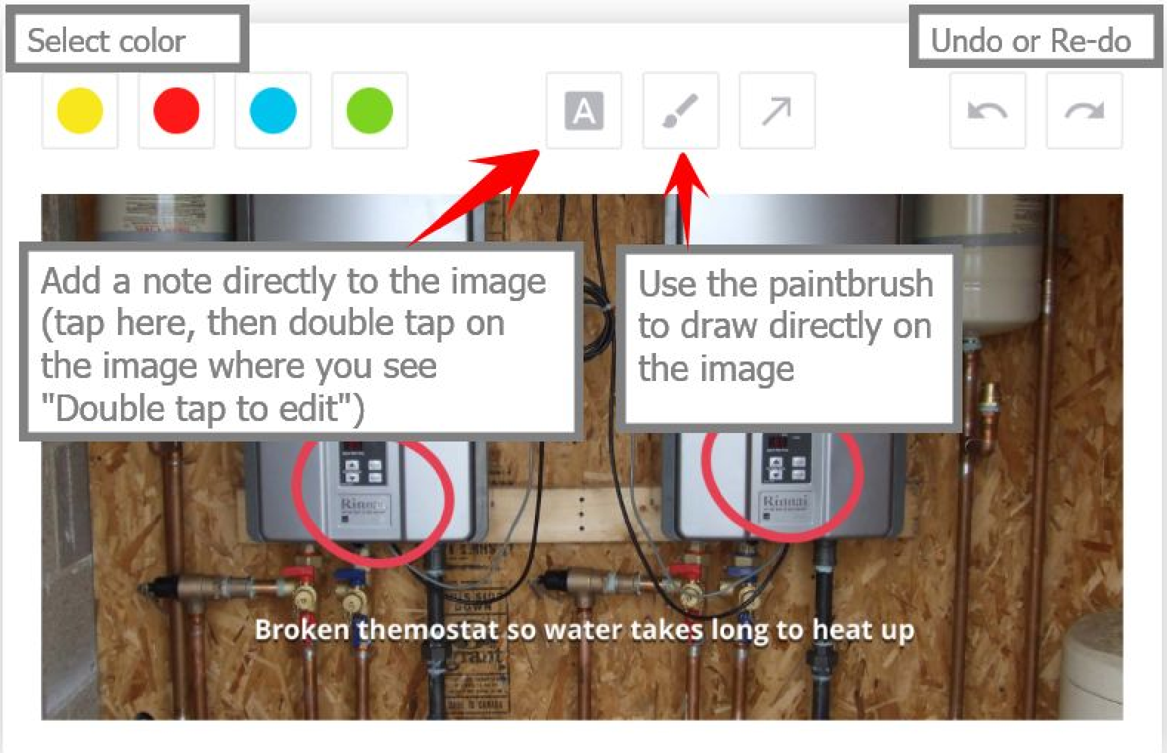
Where can you go to review ***ALL*** notes, photos, and videos in the customer record? (Circle all that apply)

Where can you go to see ***PINNED*** notes for the current job? (Circle all that apply)



True or False: Photos & Videos



When I need to take photos or record videos, I need to go outside of ServiceTitan Mobile and open the camera on my phone/tablet.	*True / False*
The image above shows how I can mark up photos in ServiceTitan Mobile.	*True / False*
I can attach photos to the job.	*True / False*
I can attach photos to estimates.	*True / False*
I can attach photos to form questions.	*True / False*

To mark up a photo, I first need to take a picture or upload a picture. Then, I tap:

__ O O __ __ __

Name one scenario where you might use this feature:

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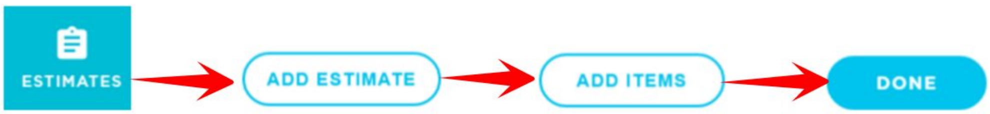
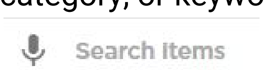
Notes:

Building and Converting Estimates



True or False: The Estimate Process

When I tap **Add Estimate**, I will be given the option to create a new estimate from scratch, or select an option package (a pre-prepared estimate template).	*True / False*
If I select an option package, I will still be able to add or delete items on the estimate.	*True / False*
As I'm adding items to an estimate or invoice, I can use the cart at the top of the screen to remove items, or review items I've added.	*True / False*
I can create as many estimates as necessary for any job.	*True / False*
I can attach photos to any estimate.	*True / False*
I can attach form findings to any estimate.	*True / False*
When I add items to an estimate or invoice, I can search by item code, category, or keyword. 	*True / False*

Building Estimates

What are the basic steps of building **a new estimate**? (Circle the correct steps)

Step One

Circle the correct action below:

Tap **Estimates**.

Which one is correct?

Tap the **Edit Pencil**.

Step Two

Circle the correct action below:

PRICE OPTIONS

Tap **Price Options**. You will need to manually enter item codes and prices.

Which one is correct?

ADD ESTIMATE

Tap **Add Estimate**. You can create a new estimate or use an option package if one is available.

Step Three

Circle the correct action below:

As you finalize the estimate, you can:

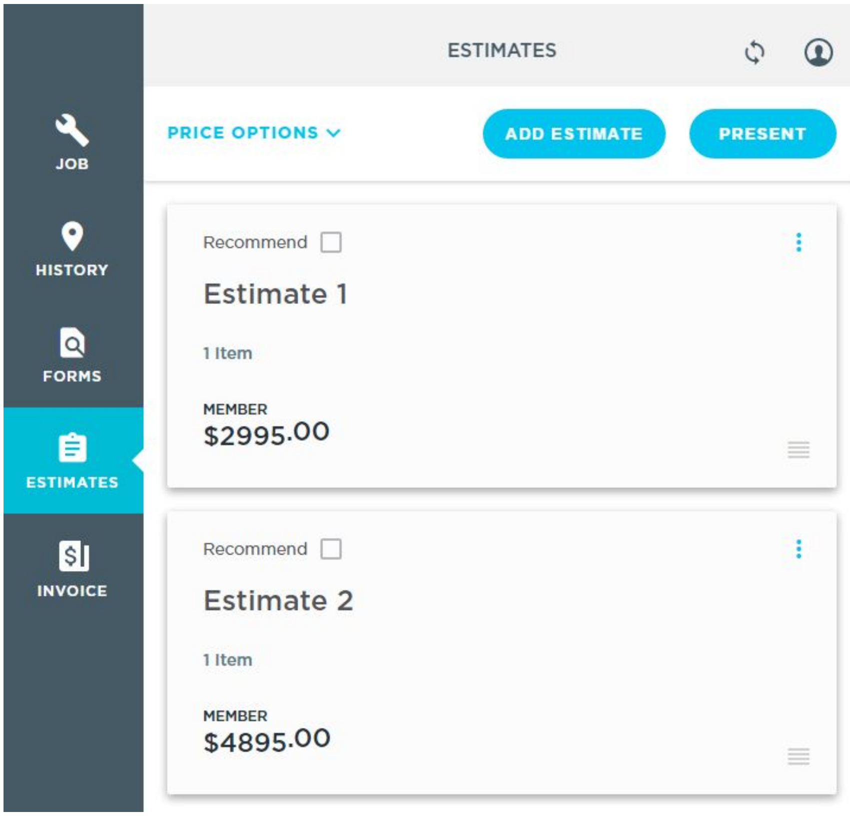
- *Add items from the Pricebook*
- *Attach photos to the estimate*
- *Add materials to the estimate*
- *Attach form findings to the estimate*
- *Duplicate, email, or print the estimate*

Which one is correct?

You'll need to wait for Pricebook info.

When you are finished building an estimate, you will tap: ___ ___ **N** ___

Managing Estimates

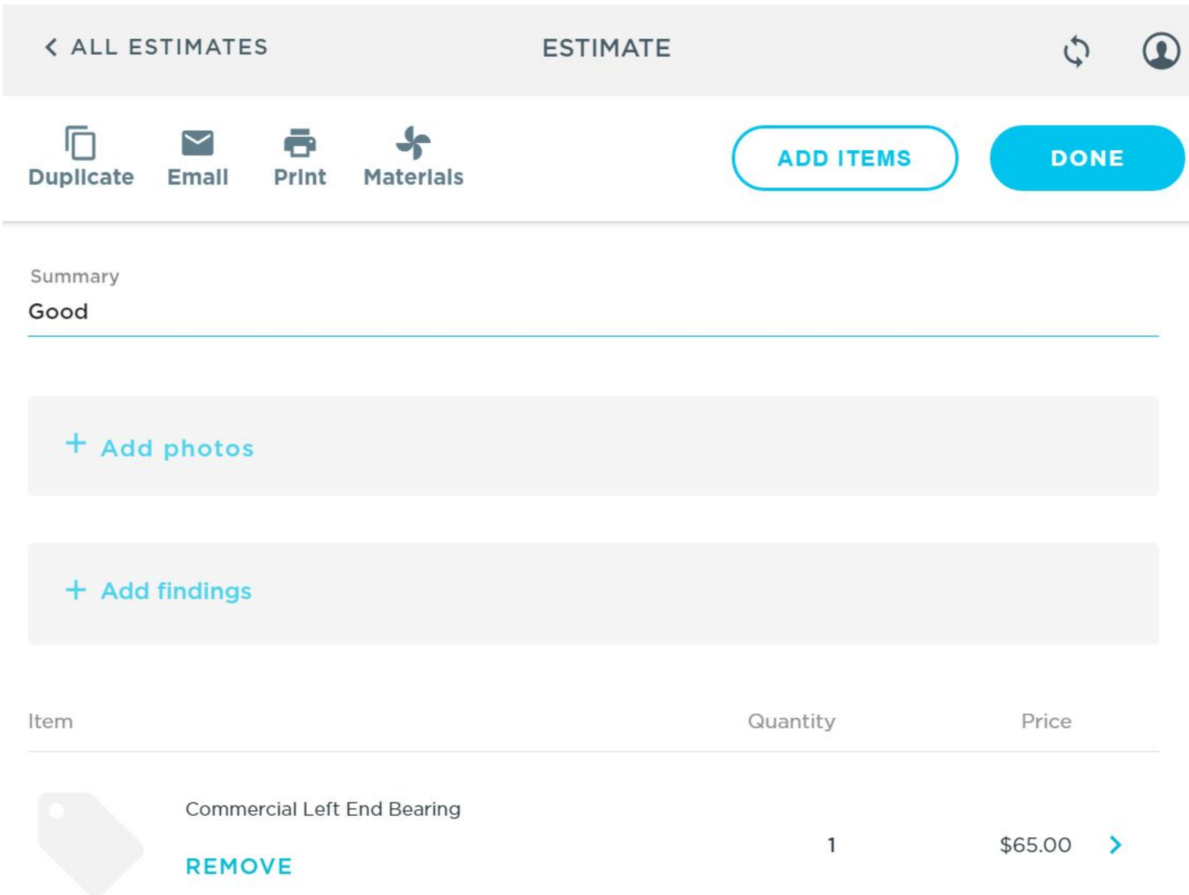


You will manage estimates from the **Estimates** screen.

I need to . . .	Where do I tap?
Change the order of estimates (move an estimate up or down)	
Create a recommended estimate	
Hide line item prices when I present to the customer	
Hide all estimate pricing when I present to the customer	
Rename, duplicate, or delete an estimate	
Add or remove items on an estimate	
Create a new estimate	

Finalizing Estimates

List at least four things you can do when you tap into an individual estimate from the **Estimates** screen.



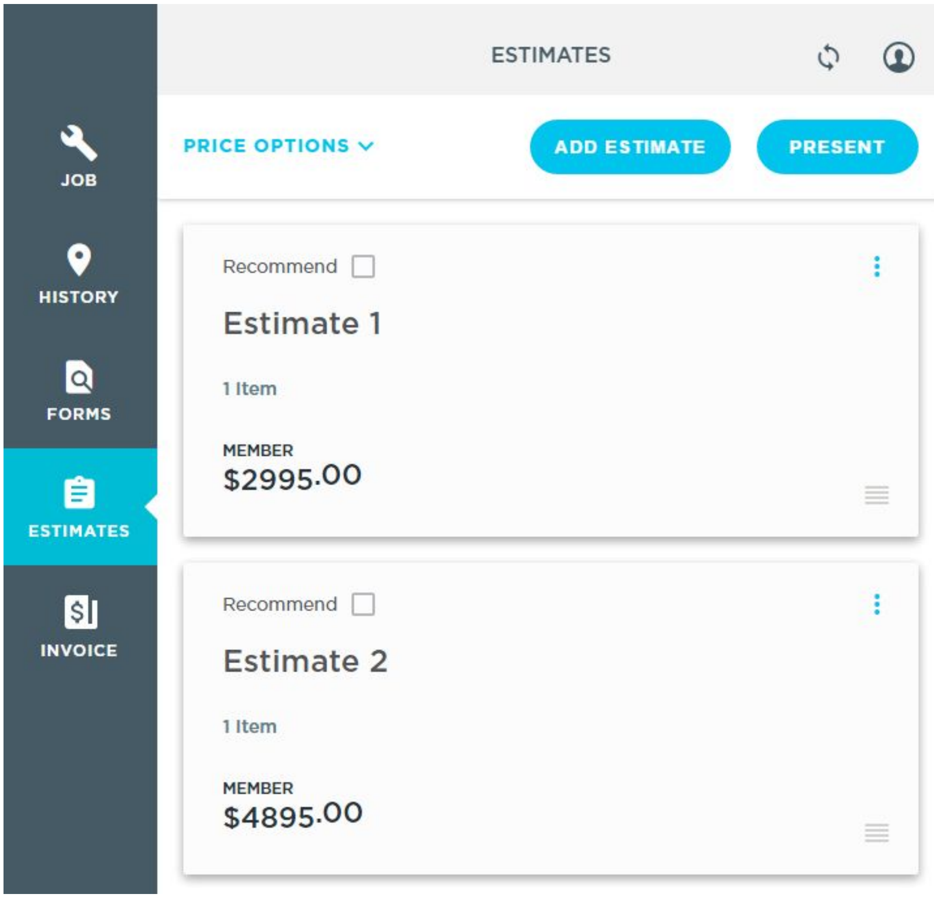
1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

Presenting Estimates



How do you **present estimates** to the customer?

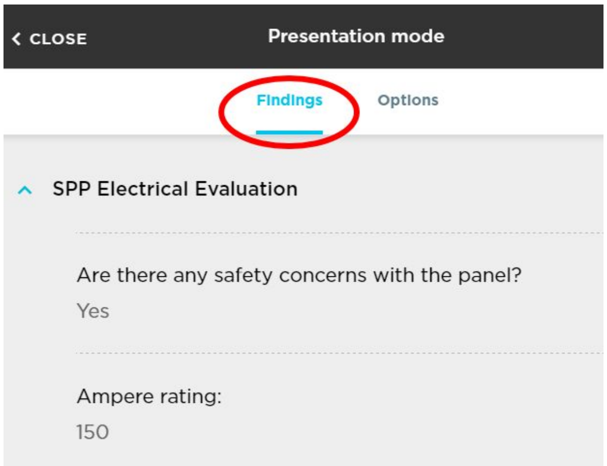
Draw an **arrow** where you would tap to enter presentation mode.

Which actions can you perform while you are in presentation mode? Check off the actions you can perform. Place an **X** through the action you **cannot** perform.

- ❏ Present fully visual estimates, using images from your Pricebook.
- ❏ Show the customer a side-by-side comparison of estimates.
- ❏ Tap **View** to show the customer an individual estimate, with line item details.
- ❏ Tap **View** to sell an estimate, by having the customer **Sign**.
- ❏ Add or remove items on an estimate.
- ❏ Review form findings with the customer.

Notes:

When I'm in presentation mode, I see a tab called **Findings**. What's under *Findings*? (Circle the correct answer)



a) Form findings (questions you starred when you completed forms).
b) Previous job notes.
c) Pricebook updates.
d) The customer history.

✪ BONUS: What will I see under the **Options** tab?

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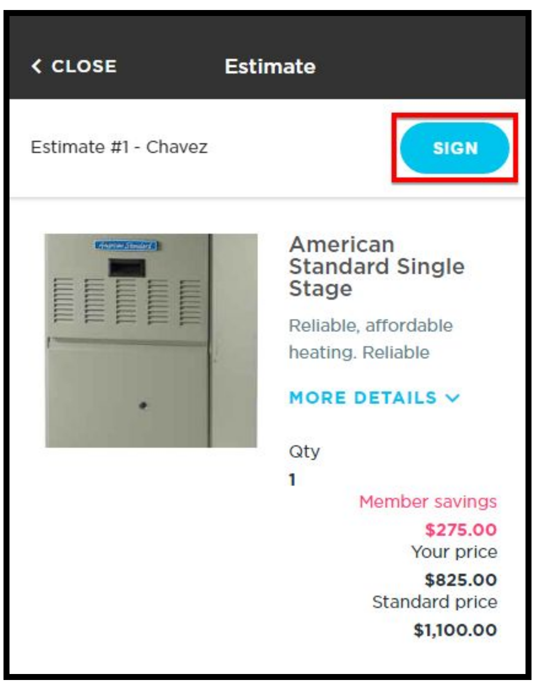
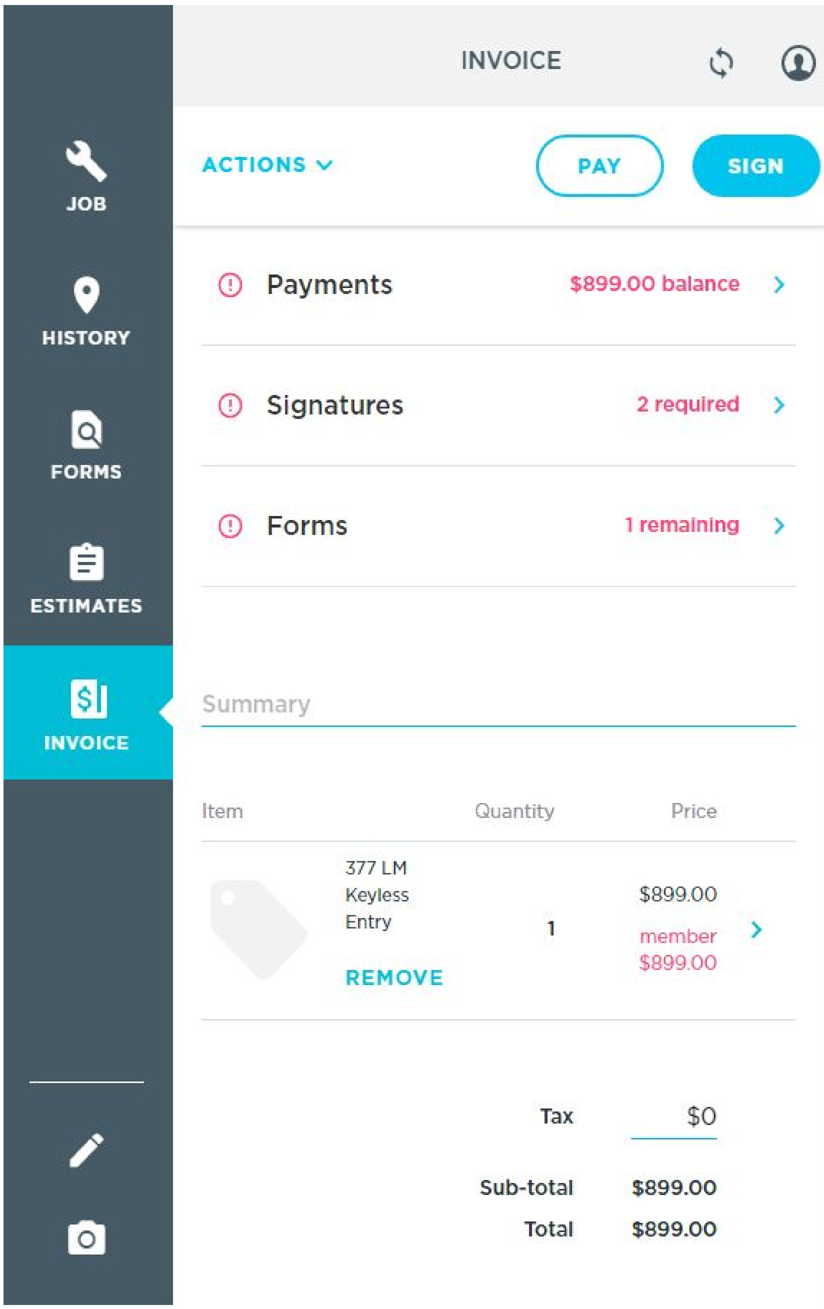
True or False: When a customer signs an estimate . . .



The office will be able to see that the estimate has been sold/converted.	*True / False*
I will be given the option to perform the work now, or select **Done for now.**	*True / False*
If I am *not* going to perform the work immediately, I need to select **Done for now** (even if I'm coming back the next day).	*True / False*
If there are items already on the invoice, I won't be able to sell an estimate.	*True / False*
The signed estimate will become available in the job history.	*True / False*

Finalizing the Invoice and Collecting Payment



I need to . . .	Where do I tap?
Add or remove items on the invoice	
Process a customer's credit card	
Collect a check or cash payment	
Complete required forms	
Have the customer sign the invoice	
Add materials	
Add PO	
Email, print, or present the invoice	
✪ *BONUS: Why don't you see the **Finish** button on the screen here?*	

Notes: