Release Notes

December 16, 2016

New Features & Improvements

Click anywhere in the list below to jump to that feature

New Feature Spotlight

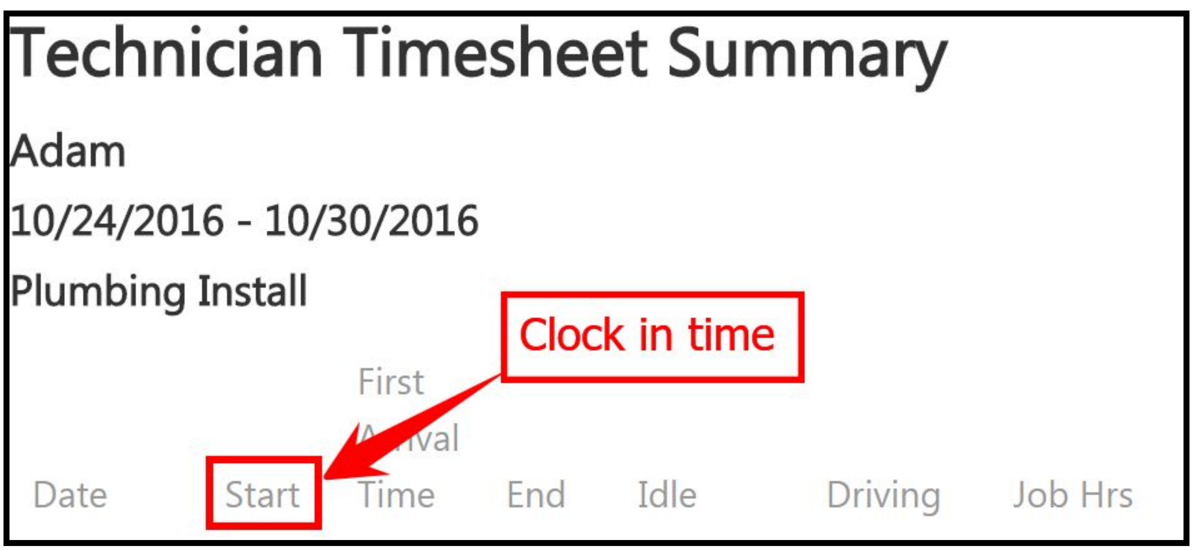
Technician Clock In / Clock Out

Overview

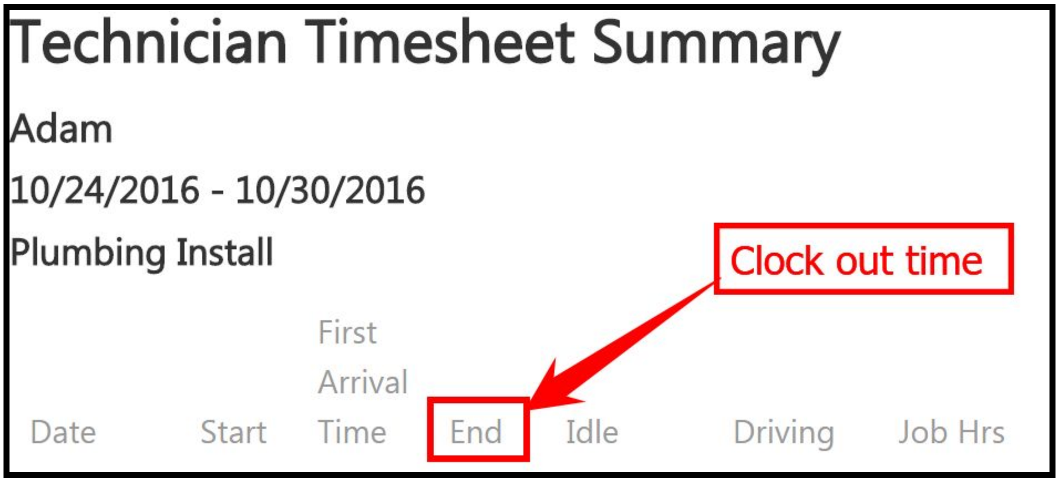
If you are familiar with ServiceTitan, you already know that a technician's drive time and job hours are automatically tracked every time the technician is dispatched to a job. With clock in / clock out features, you can efficiently track and itemize all other technician hours.

From the office, you can clock in and clock out technicians on the dispatch board. You can also configure your account so technicians can clock themselves in/out using ServiceTitan Mobile.

Clock in time will appear as the **start time** on technician timesheets.

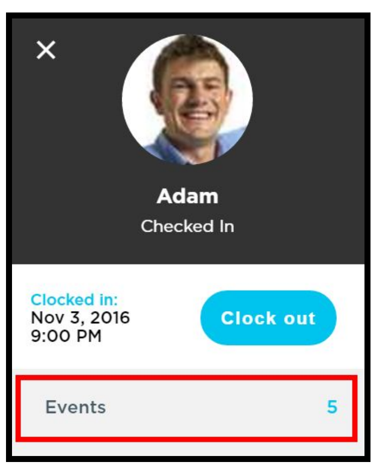


Clock out time will appear as the **end time** on technician timesheets.



Technicians can use timesheet codes when they clock in or clock out within ServiceTitan Mobile.

You can set up timesheet codes for technicians to use when they clock in / clock out within ServiceTitan Mobile. The technician can do a general clock in, or the technician can tap *Events* to see available timesheet codes. For example, a technician could clock in using a “Truck Maintenance” or “Paid Training” timesheet code. You can even set up timesheet codes to be available when the technician has a non-job appointment, if you want technicians to clock in / clock out for scheduled appointments.



By configuring idle time, **you control whether or not technicians will accrue paid hours when they clock in**

Idle time can either be paid or unpaid, depending on how your account is set up. Should you have any questions about your idle time settings, just ask your Implementation Specialist or Success Manager. For more information, read the *FAQs* available in the *Technician Clock In Clock Out* how-to article (see link below).

You can choose how **the technician will be paid for the first drive of the day**

You can set the first drive of the day as always paid, never paid, or paid only if the technician is clocked in. More information is available in the *Technician Clock In Clock Out* how-to article (see link below).

You can **deduct a technician's commute time**

These features allow you to accurately pay technicians for their commute time according to your state's payroll standards. You can deduct a technician's commute time from the first drive of the day (this means you'll *only* pay for drive time that exceeds the technician's normal commute to work). You can also deduct commute time from any timesheet code. More information is available in the *Technician Clock In Clock Out* how-to article (see link below).

And remember, you can always edit technician timesheet entries if need be.

If a technician has not been clocked in or clocked out correctly, you can always edit timesheet entries.

Required Setup and Instructions:

Clock in / clock out features are not enabled by default. If you would like to use clock in / clock, please contact your Success Manager or Implementation Specialist to configure your account.

For more information and instructions, refer to the *Technician Clock In Clock Out* how-to article (available in ServiceTitan Help).

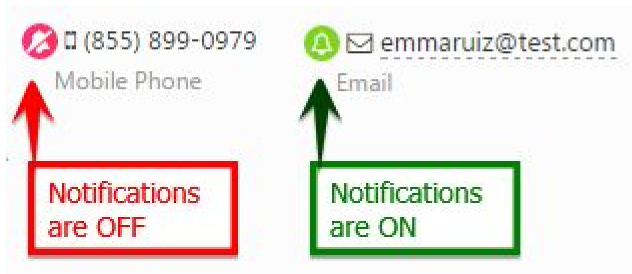
More New Features & Improvements

- ✢ Highly requested features are noted
- ✷ If the feature requires configuration, please contact your Success Manager or Implementation Specialist to turn on the feature in your account

Category	Feature / Improvement	Description
Calls & Job Booking	Customer Communications: Send out automatic appointment reminders, dispatch notifications, and surveys *Highly requested feature* ✢ *Automatically turned on*	ServiceTitan now offers customer notifications that will help you seamlessly communicate with your customers, while providing a modern-day customer service experience. By selecting notifications in **Communication Settings** (Settings > Communication Settings), you can enable automatic appointment reminders, dispatch notifications, and survey emails. Coming Soon - Real Time Technician Tracking! If your technicians are using ServiceTitan Mobile, you will soon be able to enable real time technician tracking. Customers will be able to track the arrival of their technician in real-time, similar to today's popular ride-sharing and food delivery apps. *Read more about Customer Communications* Refer to the *Customer Communications* how-to article in ServiceTitan Help for more information and full setup instructions. *Default Settings* By default, notifications will be ON for all phone numbers and emails. Notifications will also be ON for all jobs. Remember: Notifications will not be sent unless you enable them in Settings > Communication Settings.

Set a customer's preferred delivery methods

You can turn notifications on or off for any phone number or email address by clicking the bell (notifications will be on by default).

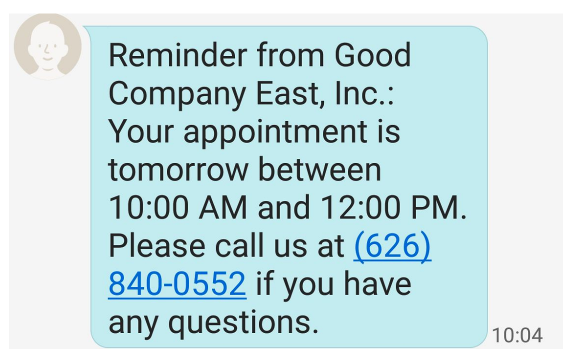


Turn notifications on or off for any job

Click the *Job Notifications* button located on the job screen to turn job notifications off (notifications will be on by default). This is useful for projects and in cases where you want to avoid sending too many communications to a customer.

These are the types of notifications you can enable:

Send ***appointment reminders*** *by text (SMS) or email*



Reminder: Your appointment with Good Company East, Inc. is tomorrow!

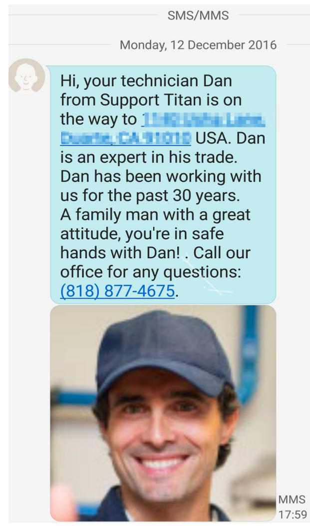
Hi,

Your appointment with Good Company East, Inc. is tomorrow between 10:00 AM and 12:00 PM. If you have any questions regarding this appointment or need to make any changes, please contact us at (626) 840-0552.

Regards,

Good Company East, Inc. Team

*Send **dispatch notifications** by text (MMS) or email*



A technician from Good Company East, Inc. is on the way!

Hi,

We wanted to let you know that Dan is on the way to

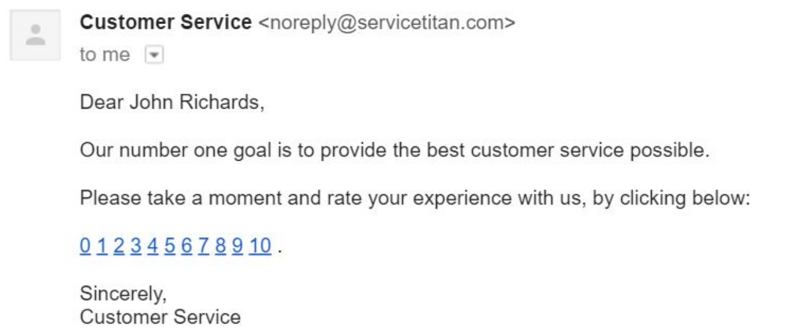
Dan is an expert in his trade. Dan has been working with us for the past 30 years. A family man with a great attitude, you're in safe hands with Dan!

You may contact the office at (818) 877-4675 if you have any questions.

Thank you.

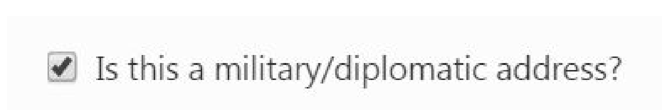
Good Company East, Inc.

*Email **customer surveys** when a job is completed*



Calls & Job Booking	When searching a customer with multiple locations, the order of search results will match search criteria *Automatically turned on*	When you have a bill to customer with multiple location addresses, all of these locations will come up when you perform a search on the **Calls** screen (even if you are searching one address, all locations tied to the bill to customer will appear in the search results). From now on, the location with the closest match to your search criteria will appear first. For example, let's say you have a corporate client with multiple rental properties. If you enter the address or customer name for a specific service location, the search results will bring up that specific location first.

Calls & Job Booking	Military & diplomatic addresses *Account configuration required* ✷	Your ServiceTitan account can be configured to support USPS-sanctioned military and diplomatic addresses. When this feature is enabled for your account, you will be able to enter military and diplomatic addresses anywhere you enter a billing address in ServiceTitan. When you create a new customer or edit a customer's address, you will see a checkbox stating *Is this a military/diplomatic address?*



When you check this box, you will notice that address fields change to accommodate a military or diplomatic address.

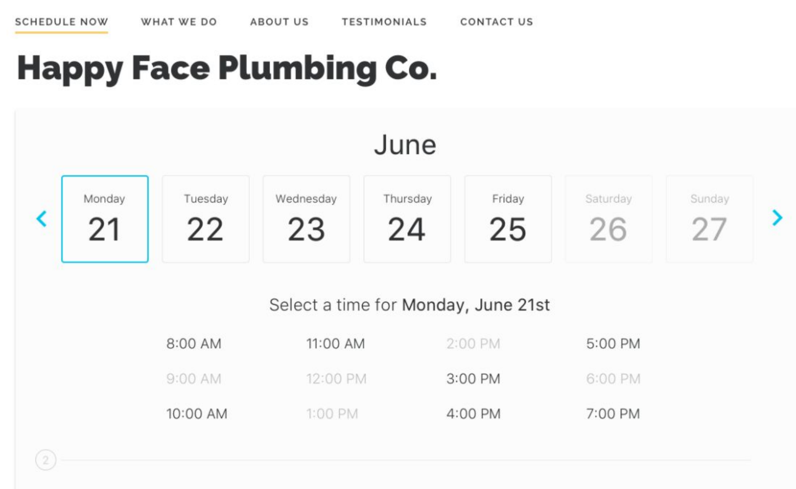
For more information, please refer to the *Military and diplomatic addresses* how-to article in ServiceTitan Help.

Calls & Job Booking

New, modern design for the web appointment scheduler - Search for existing customers when appointment requests come in, and more

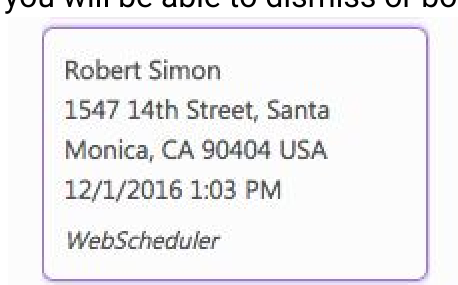
Automatically turned on

The ServiceTitan web appointment scheduler now has a new, more modern design.



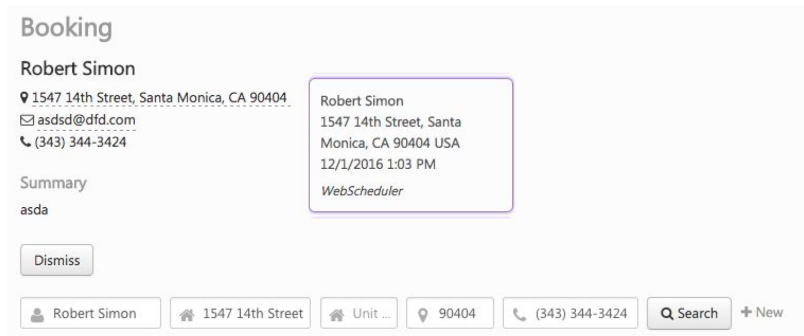
*Web appointment requests will appear on the **Calls** booking screen*

When customers request appointments online, you will see the appointment request in the *Bookings* section of the **Calls** booking screen (the booking will be tagged as a *WebScheduler* request). As with any booking request, you will be able to dismiss or book the appointment.



When web appointment requests come in, you can search to see if it is a new customer or create a new customer

When you click on a web scheduler booking, you can search to see if it is an existing customer. Click on the booking, then click **Search** to see if the customer already exists in your system. If it is a new customer, click **+New** to create the customer record (ServiceTitan will not create a new customer record unless you click **+New**).



Customize the dimensions of the web scheduler, so it will fit in seamlessly with the design of your website

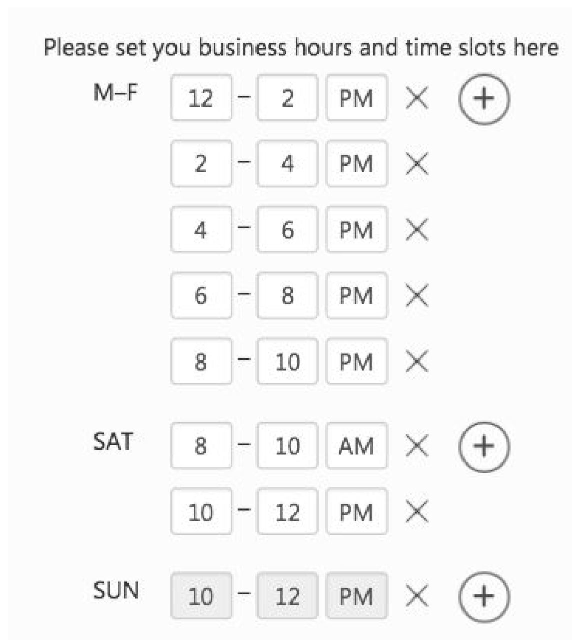
It's easier than ever to embed the web scheduler into your company website. In addition, you can customize the dimensions of the web scheduler, so it will fit in seamlessly with the design of your site.

- **How to embed the web scheduler and customize the dimensions:** To provide the embed code to your web designer, go to Settings > Web Appointments > Widget tab. Under *Widget embed code*, click **Copy to clipboard**. You can now paste the code in an email, or use the code in whatever way you like. To customize the dimensions of the web appointment scheduler, all your web designer needs to do is adjust the width and height within the line of code.

Set your own business hours and appointment time slots

When customers request appointments online, they will see a set of appointment time slots. If you have set up your business hours in ServiceTitan, you will be able to set the time and duration of each appointment time slot. Note: If you do not see business hours in your ServiceTitan settings, talk to your Implementation Specialist or Success Manager.

➢ **How to set up appointment time slots:** Go to Settings > Business Hours. For each day you are open, enter time slots you want to offer to customers. Click the **+** button to add a time slot. Click **X** to delete a time slot.



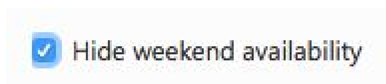
➢ **Example #1 - Appointment requests should come in for the morning or afternoon:** Let's say your Monday to Friday business hours are 8am to 6pm. You want appointment requests to either come in for the morning, or for the afternoon. In Settings > Business Hours, you could set up the following time slots for *M-F*: 8am-12pm and 12pm-6pm. Once the appointment request comes in, you can contact the customer to schedule a specific time.

➢ **Example #2 - Customers should request specific appointment times based on technician availability:** You want customers to request more specific appointment times. In Settings > Business Hours, you set up time slots to match technician availability for consultations and standard maintenance: 8am-10am, 10am-12pm, 12pm-2pm, 2pm-4pm, 4pm-6pm.

Hide Weekend Availability

Some companies do not want customers to be able to request weekend appointments directly due to high demand.

➢ **How to hide weekend availability:** Go to Settings > Web Appointments > Widget tab > check *Hide weekend availability* > Click **Save**.



Sync the web scheduler with real time technician availability

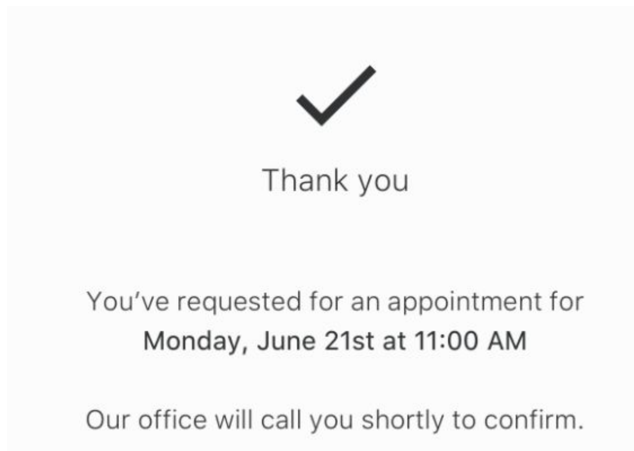
If you use technician capacity planning features in ServiceTitan, you can sync the web appointment scheduler with real time technician availability. Customers will be able to request appointments only if a technician is available during that time slot (if no technician is available, the time slot will be greyed out).

➢ **How to sync the web scheduler with technician availability:** To turn on technician capacity planning and to get started with these features, contact your Implementation Specialist or Success Manager. Once capacity planning is enabled *and* you have set up your technician availability table, you can sync your web scheduler with your technician availability. Go to Settings >

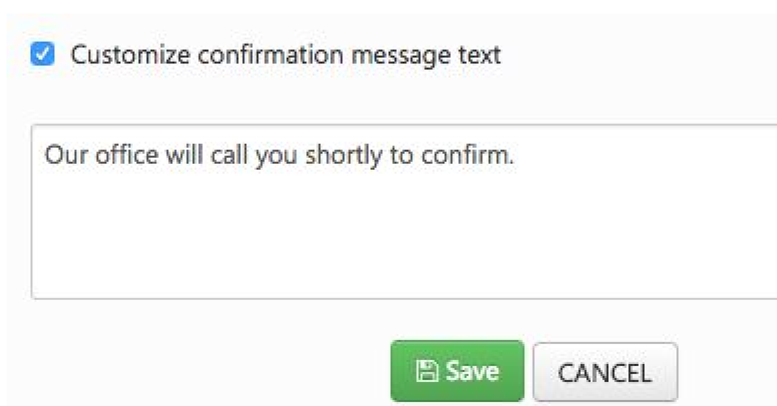
Web Appointments > Widget tab > Check *Display real time availability* > Click **Save**.

Customize the confirmation message customers will see when they request an appointment online

When customers submit an appointment request online, the confirmation screen will appear. You can customize the message that appears at the bottom of the confirmation screen.



➢ **How to customize the confirmation message:** Go to Settings > Web Appointments > Widget tab > Check *Customize confirmation message text* > Enter message text > Click **Save**.



Dashboard 2.0

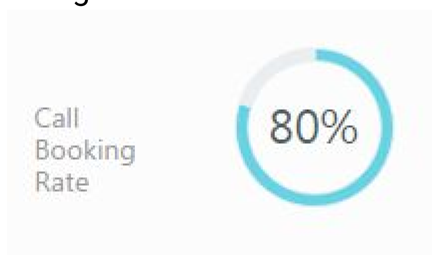
Total jobs won has been renamed to *Call Booking Rate*

Automatically turned on

On the ServiceTitan Dashboard 2.0, you will notice that under **Company Metrics** at the top you no longer see total jobs won.

Total jobs won has been renamed to *Call Booking Rate*. *Call Booking Rate* is percentage of jobs booked by your CSRs, the same as the previous total jobs won.

Note: This is a name change only. The KPI itself has not changed.



Dashboard 2.0

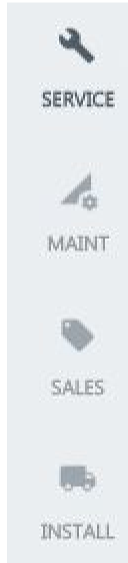
Name changes and reordering of several KPIs on Dashboard 2.0

Automatically turned on

Several KPIs on the main dashboard have been renamed to make it easier to understand data on the dashboard. In addition, some KPIs have been reorganized to make the dashboard easier to use.

Important Note:
KPI calculations have <u>not</u> changed. These are name changes only. An updated version of *Dashboard KPIs* will soon be available in ServiceTitan Help. Should you have any questions about these name changes, please reach out to your Implementation Specialist or Success Manager.

- Please take special note that *NPS* (net promoter score) has been renamed to *Customer Satisfaction*. This is a name change only. *Customer Satisfaction* is calculated the same way as the previous *NPS.*

Dashboard 2.0	**Service** now appears at the top of the menu on the KPIs table (Dashboard 2.0) *Automatically turned on*	 On the ServiceTitan main dashboard, you will notice a slight change to the left menu of the KPIs table. **Service** is now at the top of the menu (previously, **Maintenance** was at the top).
Dashboard 2.0	In the **Maintenance** and **Service** sections on the dashboard, *Replacements* will now appear under *Lead Generation* *Automatically turned on*	In the **Maintenance** and **Service** sections of the dashboard, you will no longer see a tab for *Replacements*. *Replacements* KPIs have moved under lead generation. When you click the *Lead Generation* tab, you will see two options to the left of the column headers: *All* and *Replacements*. Click *All* to see KPIs for all leads (this will include all leads within the dashboard date range, including replacement opportunity leads). Click *Replacements* to see KPIs for replacement opportunity leads only.

Dispatch Board

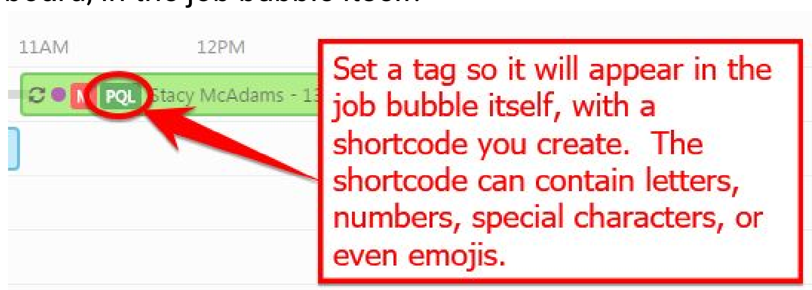
Set a tag to display in job bubbles on the dispatch board, with a custom shortcode you create

Highly requested feature ✢

Automatically turned on

If you are familiar with ServiceTitan tags, you may already know that you can set a tag so it will show on the dispatch board when you hover over any job.

You can now set tags to always display on the dispatch board, in the job bubble itself.



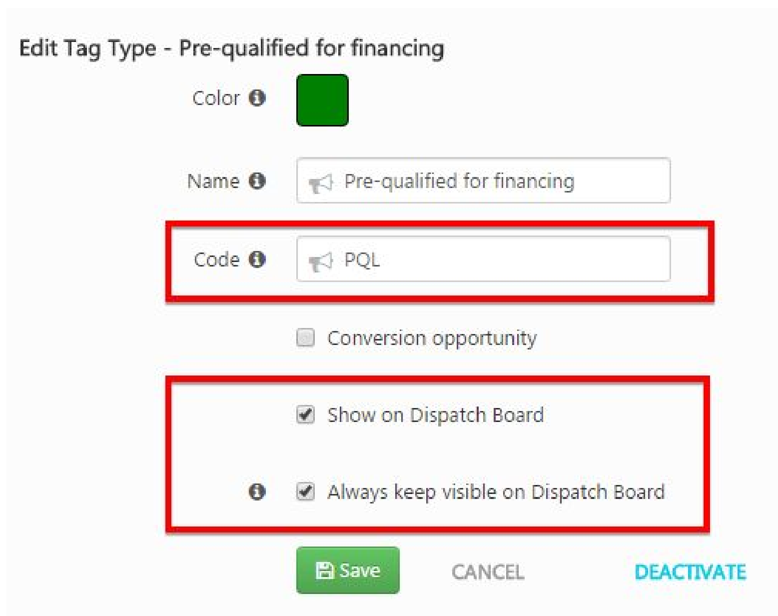
Create shortcodes to display inside the tag

You can create a shortcode that will appear inside the tag (in the image above, the tag has a shortcode of "PQL" for "Pre-Qualified"). The shortcode can contain letters, numbers, special characters, or even emojis. It is recommended that you limit shortcodes to 4 characters.

To set a tag to display in the dispatch board job bubble:

1. Navigate to Settings > Tag Types.
2. Click to add a new tag or edit an existing tag.
3. Set a color for the tag and enter a tag *Name* if necessary.

4. In the *Code* field, enter the code you would like to display inside the tag (recommended limit is 4 characters).
    a. Your shortcodes can contain letters, numbers, special characters, or even emojis.
    b. To insert an emoji, use the top navigation bar in Google Chrome (Chrome header > Edit > Emojis & Symbols).
5. Click *Conversion opportunity* if desired.
6. If you want the tag to always display on the dispatch board in the job bubble, you must click *Show on Dispatch Board* and *Always keep visible on Dispatch Board*.
7. When you are done, click **Save**.



Follow Ups

Use log templates to make it faster and easier to save a follow-up note

If you are familiar with the **Follow Up** screen in ServiceTitan, you already know that you can use the *Upcoming Appointments* and *Expiring Memberships* tabs to log follow-ups (all you have to do is click into an upcoming appointment or expiring membership, and click **Log a follow-up**).

Highly requested feature ✢

Automatically turned on

Up until now, it was necessary to manually enter all follow up notes. You can now use the *Log Templates* dropdown menu to select some of the most commonly entered notes, instead of manually typing them in. When you click **Log a follow-up**, you will see the *Log Templates* dropdown in the follow-up section.

Click the *Log Templates* dropdown to select the appropriate follow-up note:

- *Left message*
- *Call back another day*
- *Customer will call back*
- *Already completed*
- *Customer churned/using another service provider*
- *Sent email*

The *Notes* field will automatically populate with the selected text. If desired, you can edit this text and add your own notes as well.

Follow Ups

Save a follow up note to the customer or location record

Automatically turned on

When you log a follow-up on an upcoming appointment or expiring membership, you now have the option to save the note to the customer or location record. When you click **Log a follow-up**, you will see two checkboxes to the right of the **Save** button:

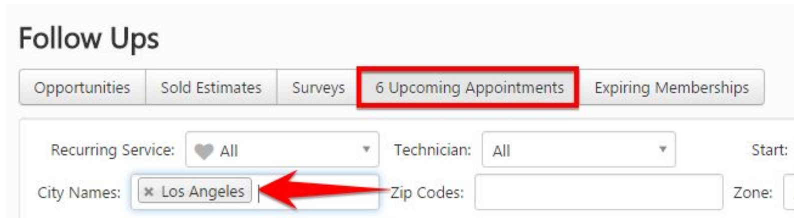
Simply check *Copy to Customer Notes* or *Copy to Location Notes* prior to clicking **Save**, to save the note to the customer or location record.

Follow Ups

City Names filter added to the *Upcoming Appointments* tab

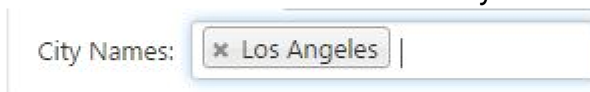
A *City Names* filter has been added to the *Upcoming Appointments* tab. You can filter your upcoming service appointments for one specific city, or for multiple cities. This filter is useful if you want to see appointments for a city, but you do not want to enter all the city's zip codes. Note: The *Zip Codes* filter will still be available.

Automatically turned on



To filter upcoming service appointments by city name:

1. Click **Follow Up** from the top navigation menu.
2. Click the *Upcoming Appointments* tab.
3. Enter a city name in the *City Names* field, then click return. Enter more city names if desired.



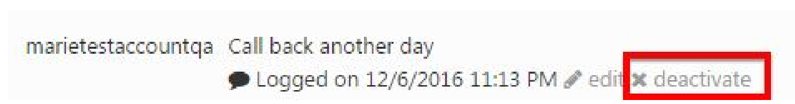
4. Once you enter a city name, the filter will be automatically applied. You will see upcoming appointments only for the city or cities you have entered.

Follow Ups

Deactivate a logged follow up

Automatically turned on (with permissions enabled for Owner and Admin only)

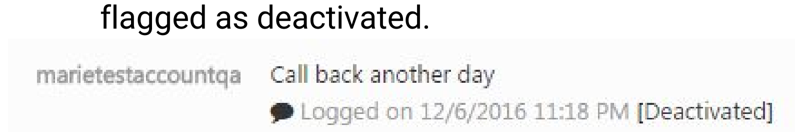
A new permission has been created called *Deactivate Follow Up Log*. When this permission is enabled, the office user will be able to deactivate a logged follow up note. This feature is useful if follow-ups have been logged in error.



To deactivate a logged follow-up, click **deactivate** next to the logged follow-up. You will be able to deactivate logged follow-ups for upcoming appointments, estimate opportunities, or memberships.

What will happen when you deactivate a follow-up:

- ➢ The number of logged attempts will be reduced by one.
- ➢ The logged follow up note will be greyed out and flagged as deactivated.



Note: Permission to deactivate logged follow-up notes will be ON by default for the Owner and Admin, and OFF by default for all other office users. To enable or disable permissions, go to Settings > Permissions.

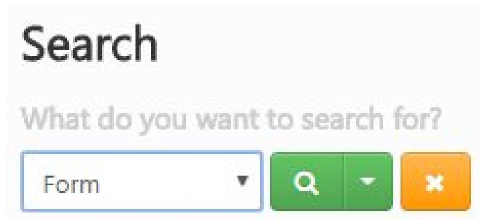
Forms

Ability to search forms

Automatically turned on

Highly requested feature ✢

You can now use the **Search** screen to search forms. Click **Search**, then select *Form* under *What do you want to search for?*.



Required fields when searching forms

There are two required search fields: *Select Form* and *Assigned To*. These fields allow you to narrow your search by choosing a specific form.

- *Select form* - Select the form you want to search under
- *Select assigned to* - You will choose *Job, Call, Equipment*, etc., depending on form settings.

Additional forms search fields

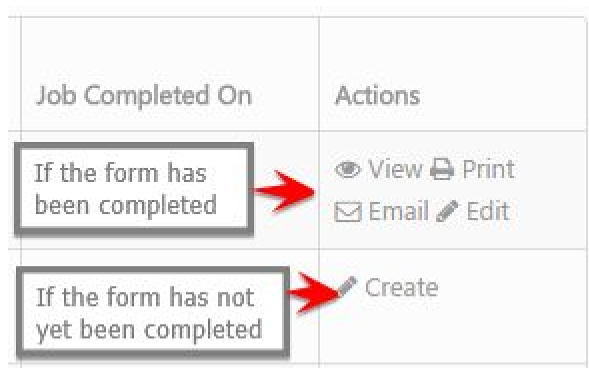
Once you select a form and where the form is assigned, you will have the option to set other search filters. The following filters are available:

- *Select form state* - You can narrow your search to *Completed, Saved,* or *Incomplete* forms (this field will default to *All States*).
- *Form completer (by name*) - You may enter the name of the person who completed the form.

- Several other search filters are available, depending on the *Assigned To* selected. For example, if you selected *Job* as the *Assigned To*, you would be able to search by *Job Type, Job Status*, *Job Summary*, etc.

*View, Create, Print, Email, or Edit Forms from the **Search** screen*

When you search forms, you will see an *Actions* column in the search results. If the form is completed or partially completed, you will be able to *View, Print, Email,* or *Edit* the form (if you have permission to perform these actions). If the form has not yet been completed, you will see a button to *Create.*



Note:

➢ When you view search results, you will not see all available data on the **Search** screen. However, this data *will* be available when you export search results to an Excel (.xlsx) or CSV (.csv) file.

Forms

Form questions and answers will be included when exporting forms to Excel

Automatically turned on

When you use the **Search** screen to export a forms search to Excel, all questions and answers for each form will be included in the Excel document. This will allow you to filter forms directly in Excel.

In the Excel document, you will also see which version was used when the form was completed. For example, if you have updated a form, the original form will display as version 1, and the updated version will display as version 2 (this is so you know which respondents used the

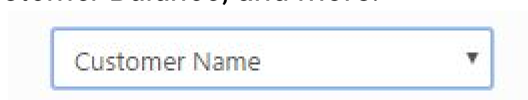
		original form, and which respondents used the new form).
Forms	Select *Assigned To* when you add or edit a form (not on the form's triggers) *Automatically turned on*	Previously in ServiceTitan, you would assign a form to *Job, Call, Customer, Location,* or *Equipment* through the form's triggers. You no longer need to create a form trigger in order to select the *Assigned to* options. From now on, when you add or edit a form in Settings > Forms, you will see an *Assigned to* section for the form itself. Simply check the desired areas to assign the form to *Job, Call, Customer, Location,* or *Equipment*.  **Important Note:** If you already have forms set up in your ServiceTitan account with triggers, there is no need to worry. The *Assigned To* options you have configured in form triggers will be automatically carried over. For example, if you have already set up a form with triggers assigned to *Job* and *Location*, when you click to edit the form in Settings > Forms, you will see that the *Job* and *Location* boxes have been automatically checked for you.
Forms	Smart fields for forms (form fields will fill in automatically, based on information pulled from the job, customer, or location) *Highly requested feature* ✢	When you create or edit forms, you will now be able to add a **Smart Field** to the form. **Smart Fields** allow you to add fields into Forms that will be automatically populated, based on information from the job, customer record, or location record. *Example of how you might use this feature:* For example, instead of having the technician or office manually enter the location address on a form, you can use a **Smart Field** on the form so the location address will be automatically filled in. *How to add a **Smart Field** to a form*

Automatically turned on

1. Navigate to Settings > Forms. Click **Add Form** or click to edit an existing form.
2. Click +**Add New Item**.

3. In the *Type* field, select **Smart Field**.

4. Beneath the *Type* field, you will see another dropdown. Use this dropdown to select the type of **Smart Field** you would like to add. Several options are available, including *Customer Name, Bill-to address, Job start time, Technician name, Customer phone number, Customer email, Customer Balance*, and more.



5. When you are finished creating **Smart Field** form item, click **Done**.
6. When you are done with the form, make sure to click **Save**.

Forms

Dropdown fields on forms (create a dropdown menu for form questions)

Highly requested feature ✢

Automatically turned on

You can now create your own dropdown menu for any form question.

Example of how you might use this feature:

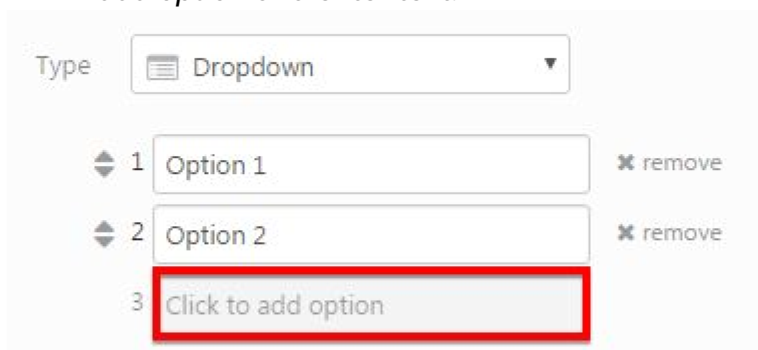
You can save your employees a lot of time by creating dropdown menus on forms. Dropdown menus will help employees fill in form fields quickly and easily.

How to add a dropdown menu to a form:

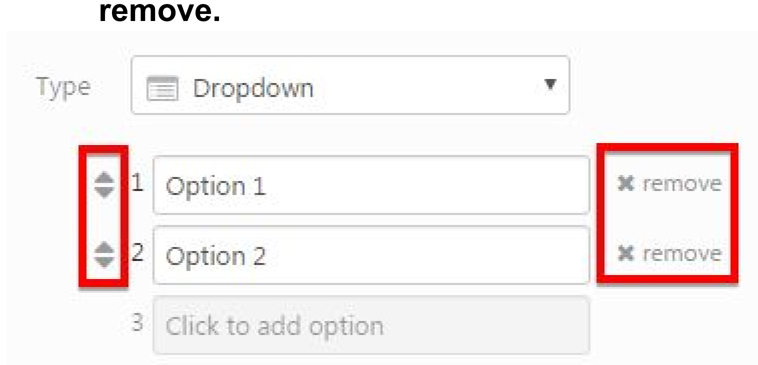
7. Navigate to Settings > Forms. Click **Add Form** or click to edit an existing form.
8. Click +**Add New Item**.

9. In the *Type* field, select **Dropdown**.

10. Enter the *Header* and *Description* for the form question. Click *Required* if this question will be required.
11. Enter the dropdown menu. To add additional dropdown options, click where you see *Click to add option* and enter text.



12. Note: You may save an empty field as an option, if you want to provide the option to leave the question blank.
13. You can edit the dropdown menu if desired. Use the grey arrows on the left to move options up/down. You may also delete options by clicking **remove.**



14. When you are done creating the dropdown, click **Done**.
15. When you are done with the form, make sure to click **Save**.

Invoices & Estimates

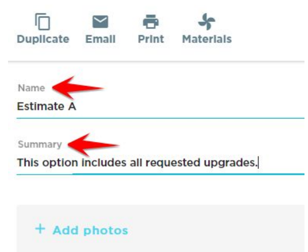
Ability to enter an estimate *Name* in addition to the estimate *Summary*

Automatically turned on

Office users and technicians will now be able to enter an estimate *Name* in addition to an estimate *Summary*.

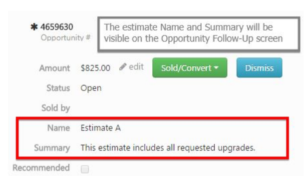
Estimate Name and Summary in ServiceTitan Mobile

Technicians using ServiceTitan Mobile will see the *Name* and *Summary* fields when they create a new estimate. Note: The estimate *Name* will be displayed when the technician enters presentation mode.

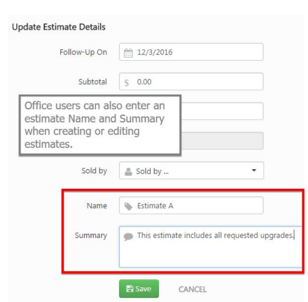


Estimate Name and Summary in ServiceTitan Desktop

Office users will see the same fields for *Name* and *Summary* when they view estimates on the *Opportunity Follow-Up* screen, create/edit estimates, or view full estimate details.



Office users can also enter an estimate *Name* and *Summary* when creating or editing estimates.



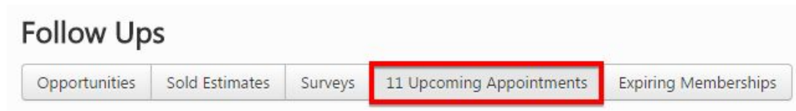
Memberships

New columns in the Upcoming Appointments and Expiring Memberships tabs

Automatically turned on

New columns have been added to the *Upcoming Appointments* tab on the **Follow Up** screen. These columns will give you more detailed information about appointments you are trying to schedule.

When you go to the *Upcoming Appointments* tab, you will see the following additional columns:



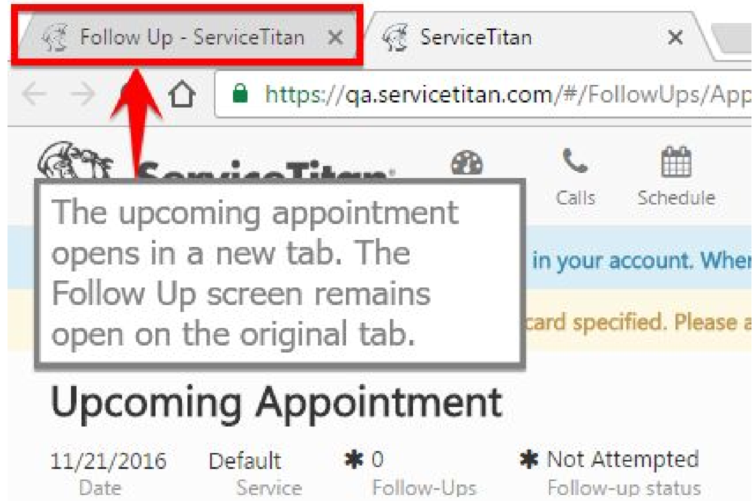
- *Preferred Technician* - The technician who sold the membership (the technician who was given *Sold by* credit).
- *Zone* - The customer's zone.
- *Follow Up Attempts* - Number of follow-ups that have already been logged.
- *Expired Equipments* - If the customer has any expired equipment that might need replacing, you will see the equipment listed here.
- *Expired Equipments Age* - Age of expired equipment.
- *Membership Expiration Date* - Date the membership will expire.

Memberships

The Upcoming Appointment booking page will now open in a new tab

Automatically turned on

When you click into an upcoming appointment from the **Follow Up** screen, the booking page will open in a new tab. This will allow you to schedule appointments more easily. The **Follow Up** screen will always be open in the original tab, so you can proceed with scheduling the next appointment without needing to go back.

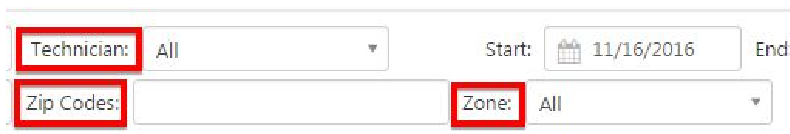


Memberships

New filters available on the *Upcoming Appointments* tab (technician, zip codes, zone)

Automatically turned on

Three new filters have been added to the *Upcoming Appointments* tab on the **Follow Up** screen. These filters will help CSRs prioritize and organize upcoming service appointments.



- *Technician* - Filter by the technician given *Sold by* credit for selling the membership.
- *Zip Codes* - Filter by service location zip code(s).
- *Zone* - Filter by customer zone.

Memberships

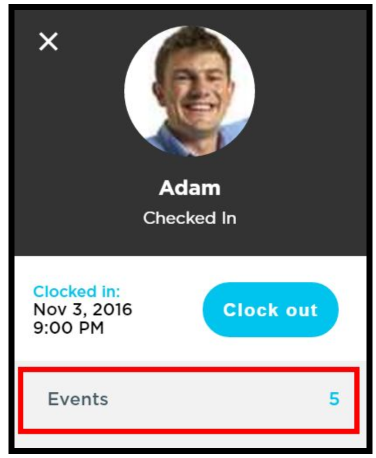
Phone and email columns added to *Upcoming Appointments* exported list

Automatically turned on

When you export the upcoming appointments list from the *Upcoming Appointments* tab, you will now see two separate columns for the customer phone number and email address. This will give you the option of exporting your upcoming appointments for use as a contact list.

E	F
Phone Numbers	**Email Addresses**
8186601192	noreply@servicetitan.com

Memberships	Sell memberships from the office, without needing to assign a managed tech to the job *Automatically turned on (if you are on managed tech billing)*	This feature applies to customers on managed tech billing. If you sell a membership task and an office employee sold the membership (an office user is the *Sold by* on the membership), you no longer need to assign a managed tech in order to close out the job and finalize the invoice.
Mobile 2.0	Technician clock in / clock out from Mobile 2.0 *Highly requested feature* ✢ *Account configuration required* ✷	Technicians will now be able to clock in and clock out to jobs, as well as non-job appointments.  To clock in or clock out, technicians will go to settings (simply tap the profile picture in the upper right corner of the app). Clock in and clock out times will be reflected on timesheets. You can set up timesheet codes for technicians to use when they clock in / clock out within ServiceTitan Mobile. The technician can do a general clock in, or the technician can tap *Events* to see available timesheet codes.



Before technicians can use clock in / clock out, the office manager must enable technician permission for *Mobile Clock In and Clock Out*.

Note:

- ➔ If a technician forgets to clock out, the technician will be automatically clocked out as of their last job completion, or last non-job appointment.
- ➔ For more information on clock in / clock out features, search for the *Clock in / clock out* how-to article in ServiceTitan Help.

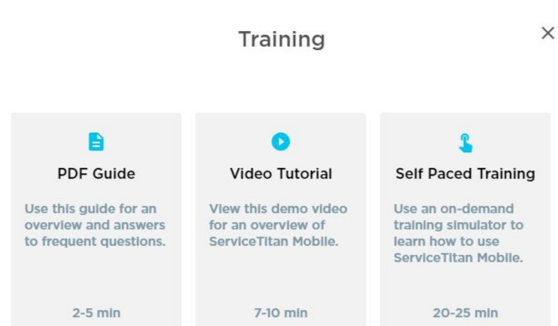
Mobile 2.0

Training portal in Mobile 2.0

Highly requested feature ✢

Automatically turned on

Technicians will now be able to access a training portal from ServiceTitan Mobile 2.0. Technicians can use the training portal to access several resources, including a PDF guide to Mobile 2.0, video tutorial, and self-paced training modules. To get to the training portal, technicians should click their profile picture in the upper right corner, then select **Training** from the main menu.



Mobile 2.0

Technicians can now sell membership add-ons in ServiceTitan Mobile

Highly requested feature ✢

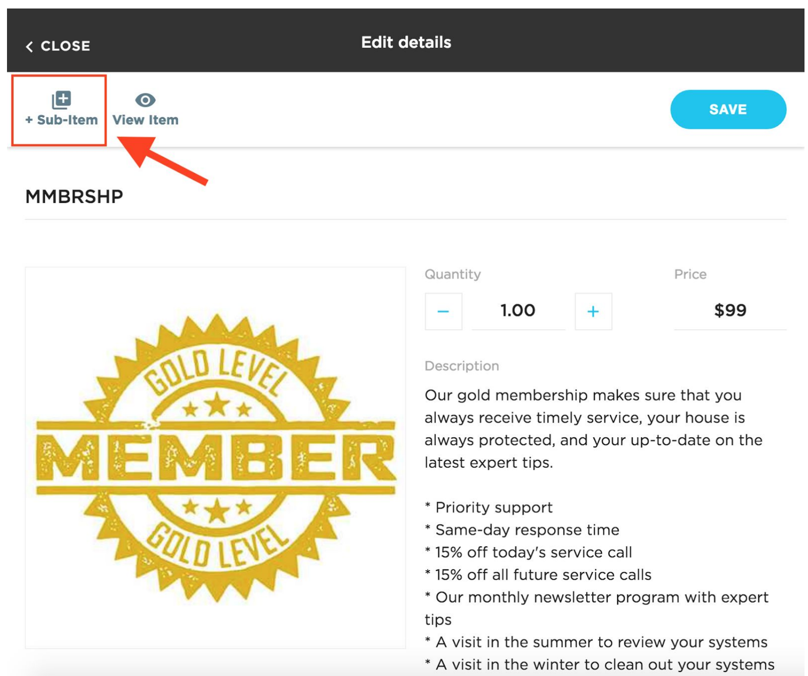
Automatically turned on

Technicians will now be able to sell membership add-ons in ServiceTitan Mobile.

The technician can sell add-on recurring services, or use any item from the Pricebook as a membership add-on.

How to sell a membership add-on in ServiceTitan Mobile

When the technician adds a membership task to an invoice, the technician will tap **Sub-item** to add a membership add-on. The price of the membership add-on will be rolled up into the membership.



Mobile 2.0

View photos in fullscreen mode in ServiceTitan Mobile 2.0

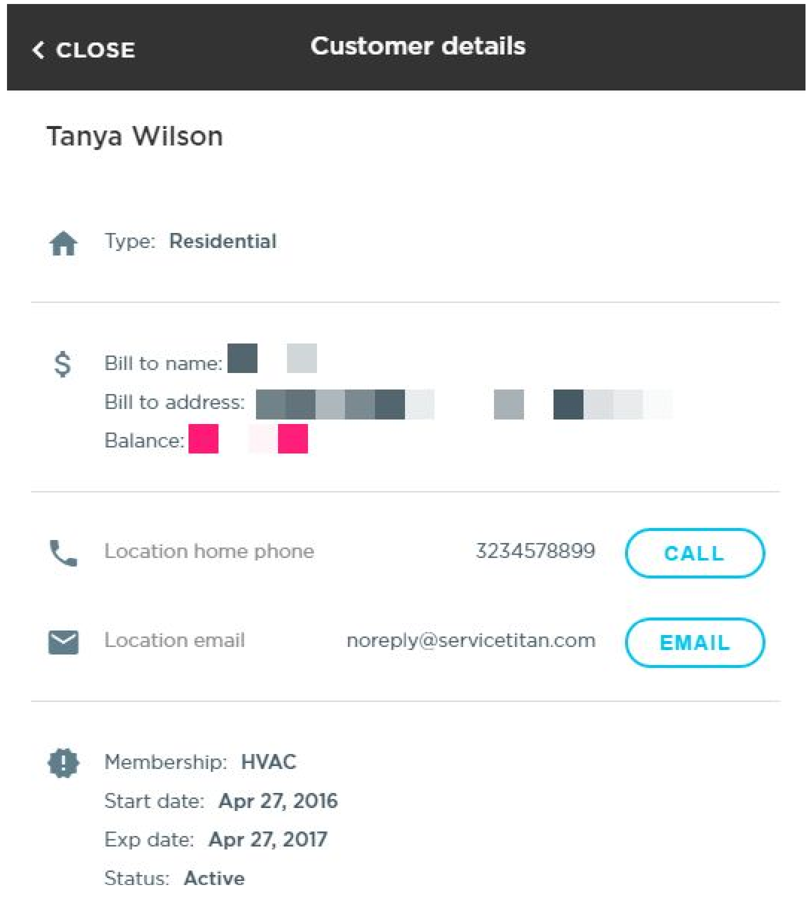
Highly requested feature ✢

In ServiceTitan Mobile 2.0, Technicians will now be able to tap photos to view images in fullscreen mode. This will allow technicians to better see photos and photo details, and improve their work efficiency.

Technicians will be able to view photos in fullscreen whether they have uploaded the photo, or whether the photo has been attached to a form question.

	Automatically turned on	Technicians will also be able to use the **Doodle** feature to mark up photos in fullscreen mode.
Mobile 2.0	Renaming on the technician scorecard *Automatically turned on*	Several KPIs on the technician scorecard have been renamed to make it easier to understand data. **Important Note:** KPI calculations have <u>not</u> changed. These are name changes only. An updated guide to the technician scorecard will soon be available in ServiceTitan Help. Should you have any questions about these name changes, please reach out to your Implementation Specialist or Success Manager. ➢ Please take special note that *NPS* (net promoter score) has been renamed to *Customer Satisfaction*. This is a name change only. *Customer Satisfaction* is calculated the same way as the previous *NPS.*
Mobile 2.0	Warranty information will be displayed when presenting estimates and invoices *Automatically turned on*	When technicians present invoices and estimates in ServiceTitan Mobile, the warranty information for equipment items on the invoice/estimate will be displayed. The start and end of the manufacturer warranty and service warranty will both be displayed, if this warranty information is entered in the Pricebook.
Mobile 2.0	**Customer Details** flyout on the main job screen *Automatically turned on*	Technicians using ServiceTitan Mobile 2.0 will now be able to tap **Customer Details** at the top of the main job screen. CUSTOMER DETAILS › When the technician taps **Customer Details**, a flyout will appear displaying the customer type (residential or commercial), bill to name, bill to address, customer

balance, location phone, location email, and membership information.



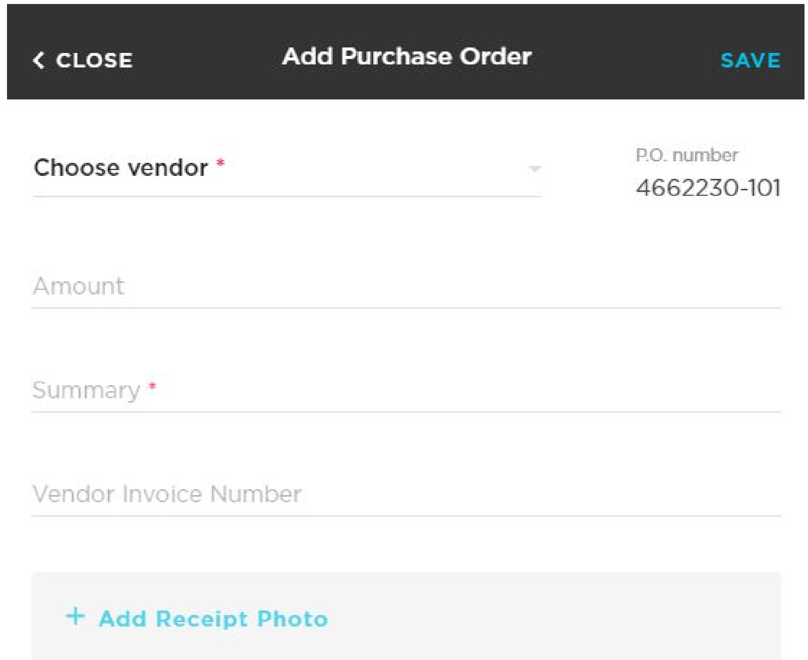
Mobile 2.0

Add POs link now appears on the main job screen

Automatically turned on

An **Add PO** link has been added to the top of the main job screen in ServiceTitan Mobile 2.0.

When technicians tap **Add PO** (located at the top of the job screen), a flyout will appear allowing the technician to add a PO to the job.



Mobile 2.0

See recommended estimates when in presentation mode

Automatically turned on

When technicians present estimates, they will now be able to see which estimates are recommended while in presentation mode. Note: Technicians must have permission enabled in order to mark estimates as recommended.

Mobile 2.0

Technicians can still add new payments, even if they do not have permission to edit payments

Automatically turned on

When you enable permission for technicians to edit payments in ServiceTitan Mobile, the technician will be able to edit payment memos only. Note: Technicians will not be able to delete payments or edit transaction details.

Even if the technician does *not* have permission to edit payments, the technician will *still* be able to *add new payments.*

To enable or disable permission to edit payment, navigate to Settings > Permissions or Settings >

		Technicians > Permissions tab. The name of the permission is *Mobile Edit Payment*.  For more information on permissions, search ServiceTitan Help for *Reference Guide: ServiceTitan Permissions*.
Mobile 2.0	Forms will now be listed alphabetically *Automatically turned on*	When the technician taps **Forms** in ServiceTitan Mobile, forms will now be listed alphabetically.
Mobile 2.0	Credit card authorization signature required for all credit card payments (authorization signatures will appear on printed or emailed invoices) *Automatically turned on*	Every time a credit card is used for payment, the credit card authorization signature is required. *Authorization signatures will appear on printed or emailed invoices* If any credit card payment has been made on an invoice, you will see the credit card authorization signature when you print or email the invoice. If multiple payments have been made with the same credit card or with different credit cards, a separate authorization signature will appear for each transaction. *Disclaimer* When a customer signs a credit card authorization, the customer will see the following disclaimer at the top of the screen: “I authorize 'Company Name' to charge the agreed amount to my credit card provided herein. I agree that I will pay for this purchase in accordance with the issuing bank cardholder agreement.”

Payroll

New overtime settings are now available: 10 hour workday and 8 hour workday

Highly requested feature

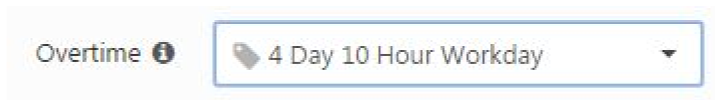
Automatically turned on

New overtime settings are now available for a *4 Day 10 Hour Workday* and *5 Day 8 Hour Workday*. You can now choose from the following overtime options:

- *Standard*
  California
- *4 Day 10 Hour Workday* (new overtime setting)
- *5 Day 8 Hour Workday* (new overtime setting)

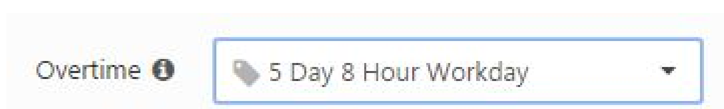
Below you will find an explanation of new overtime settings.

4 Day 10 Hour Workday



- Standard hourly pay for first 40 hours in a pay period (one week).
- Overtime for hours worked in excess of 10 hours in any single day.
- Once technician has worked 40 standard hours in a pay period, then every other hour worked is overtime.

5 Day 8 Hour Workday



- Standard hourly pay for first 40 hours in a pay period (one week).
- Overtime for hours worked in excess of 8 hours in any single day.
- Once technician has worked 40 standard hours in a pay period, then every other hour worked is overtime.

Changes to the Technician Timesheet Summary and Technician Activity Detail reports:

- If you select one *4 Day 10 Hour Workday* or *5 Day 8 Hour Workday* overtime settings, *Double Time* will always be left blank (since double time will not apply).
- If you select one *4 Day 10 Hour Workday* or *5 Day 8 Hour Workday* overtime settings, you will be able to run and schedule the *Technician Timesheet Summary* and *Technician Activity Detail* reports by payroll period <u>only</u>. You will be able to schedule these reports by weekly intervals <u>only</u>.
- Regular hours, overtime hours, and hourly pay will be calculated according to which overtime setting you have selected.

Payroll

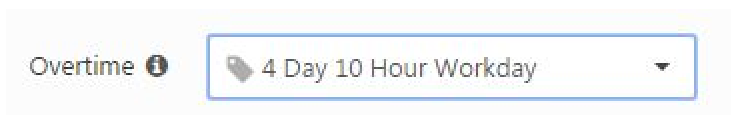
Ability to set overtime rules in individual technician profiles

Highly requested feature ✛

Automatically turned on

You can now set overtime for an entire business unit <u>or</u> technician-by-technician.

If you want to apply different overtime rules to different technicians, you may set overtime in individual technician profiles (Settings > Technicians > Payroll tab > Overtime).



Note: Overtime settings in individual technician profiles will <u>override</u> business unit overtime settings.

Projects

Ability to move payment from one project invoice to another

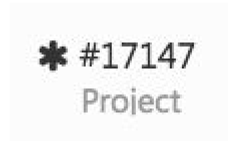
Automatically turned on

If you are familiar with project features in ServiceTitan, you already know that you can attach multiple jobs to a single project. The project screen lists all jobs, invoices, and payments attached to the project.

On the project screen, you now have the ability to move a customer payment from one project invoice to another.

To move payment on the project screen:

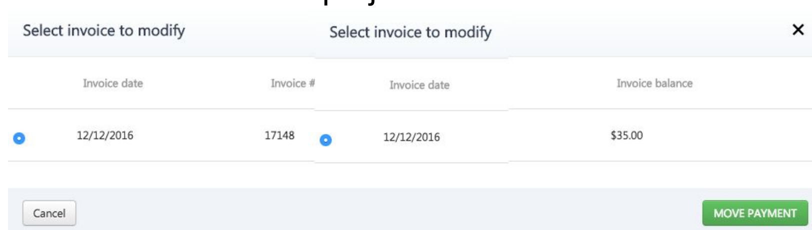
1. Navigate to the project screen (click on the project number in the upper right corner of the job screen, or use **Search** to search for the project).



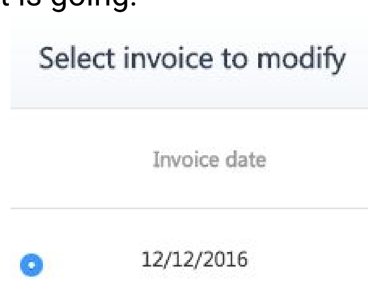
2. Scroll down to the *Payments* list. You will see a blue **Move Payment** button next to each pending payment.

    a. Note: You cannot move posted or exported payments. If you need to move a posted payment, go to the **Invoice** screen to unpost the payment.

3. When you click the blue **Move Payment** button, you will see a pop-up that says *Select invoice to modify*. The pop-up will list all the other invoices attached to the project.

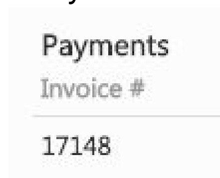


4. Click the button next to the invoice where the payment is going.

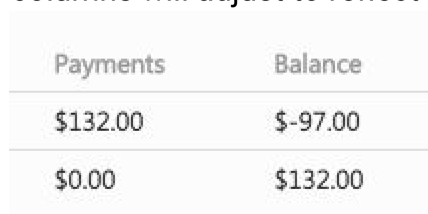


5. Click the green **Move Payment** button.

6. The payment will be moved immediately. On the project screen, you will see the moved payment reflected in the *Payments* and *Invoices* section.
    a. Under *Payments*, the invoice number attached to the payment will be updated to the invoice you selected.



    b. Under *Invoices*, you will see that the payment has moved to the invoice you selected. The *Payments* and *Balance* columns will adjust to reflect the change.



Reports

New Report: *Customer by Service Spend History Report*

Automatically turned on

The *Customer by Service Spend History Report* allows you to track how much customers spend after buying a certain task, particularly a membership. You will be able to gauge the value of certain tasks to see whether they resulted in an increased spend amount by that customer.

When you run the *Customer by Service Spend History Report,* you will choose a task from your Pricebook.

The report will provide you with important sales data relevant to that Pricebook task. The report will display customer name, customer location, job number, invoice number, invoice subtotal, task code, amount spent since task was used, technician, campaign, invoice date, and other information.

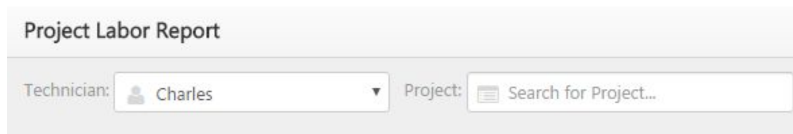
Reports

New Report: *Project Labor Report*

Automatically turned on

The *Project Labor Report* will break down all the time worked on a project by job.

The report will allow you to search by technician or by project to view a breakdown of timesheets. On the report you will see job numbers listed for each job attached to the project, along with the timesheet entries for each job.



Reports

New Report: *Web Booking Summary Report*

Account configuration required ✹

The *Web Booking Summary Report* will show you the effectiveness of your online leads.   The report will pull in data directly from your web booking sources (the web scheduler, HomeAdvisor etc). Use this report to see jobs booked, jobs completed, job average, conversion rate, and more.

Reports

Job Costing Report now includes adjustment invoices

Automatically turned on

The *Job Costing Report* will now include adjustment invoices. Job costing calculations will include adjustment invoice subtotals, as well as material costs on adjustments invoices.

Reports

Job Business Unit column added to the *Technician Activity Detail Report*

Automatically turned on

A column displaying the job business has been added to the *Technician Activity Detail Report*. The *Job BU* column will allow you to see where the technician is accruing hours, by business unit.

You will see the *Job BU* column when you view the report in ServiceTitan, and when you export the report in Excel (.xlsx) or CSV (.csv) format. Note: *Job BU* displays the business unit of the job, <u>not</u> the business unit of the technician.

Thursday 12/1/2016

Invoice #	Job BU	Start
4659584	HVAC Install	2:30 AM
4659584	HVAC Install	3:04 AM

Reports

Job Business Unit column added to Technician Dispatch Report export

Automatically turned on

A column displaying the business unit of the job has been added to the *Technician Activity Detail Report*. The *Job BU* column will allow you to see where the technician is accruing hours, by business unit.

You will see the *Job BU* column <u>only</u> when you export the report in Excel (.xlsx) or CSV (.csv) format. Note: *Job BU* displays the business unit of the dispatched job, <u>not</u> the business unit of the technician.

I	J	K	L	M
Status	**Job BU**	**Inv. #**	**Total**	**Payments**
Completed	Plumbing	A4654759	$ 0.00	Check-$0.00
Completed	Plumbing	A4654895	$ 199.00	Credit Card-$199.00

Reports

It will be faster to generate and print account statements with the *Accounts Receivable (Summary) Report*

Automatically turned on

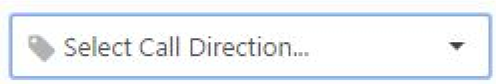
Improvements have been made to the *Accounts Receivable (Summary) Report*, so it will be faster to generate and print account statements. This will greatly improve office efficiency for companies that generate and print account statements in large quantities.

Search

Call Direction filter (inbound or outbound) added to the **Search** screen

Automatically turned on

When you search *Calls* on the **Search** screen, you will now be able to filter by *Call Direction* (inbound or outbound). The *Call Direction* dropdown is located right beneath *Call Type*. Use the *Call Direction* dropdown to filter your search if you wish to see inbound calls or outbound calls only.



Settings
(Custom Fields)

Create dropdown menus with any custom field

Automatically turned on

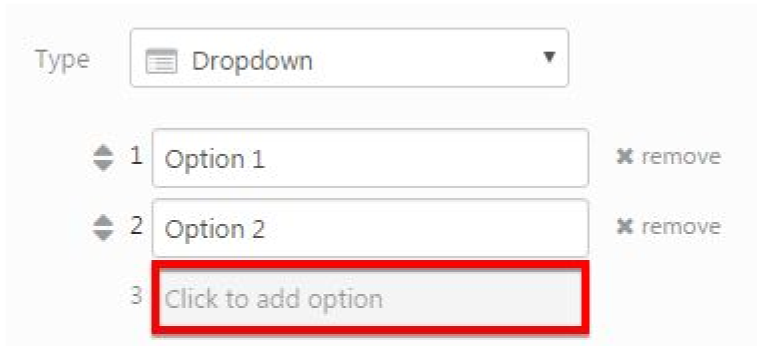
If you are already familiar with custom fields, you know that ServiceTitan allows you to create custom fields in the customer record, location record, job record, purchase order page, equipment record, employee settings, or technician settings.

You will now have the option to create a dropdown menu with any custom field. Using dropdown menus can improve work efficiency and reduce human error.

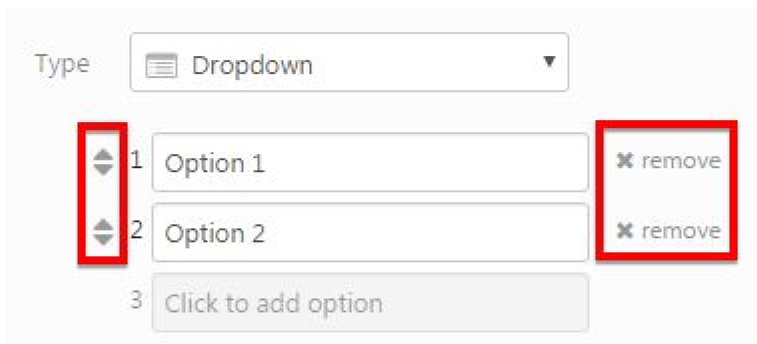
How to create a dropdown menu for a custom field:

1. Navigate to Settings > Custom Fields. Click **Add Custom Field**.
2. Enter a *Name* for the field and select *Where it appears*.
3. In the *Type* field, select *Dropdown*.

4. Then, enter dropdown menu items. To add additional dropdown options, click where you see *Click to add option* and enter text.



5. Note: You may save an empty field as an option, if you want to provide the option to leave the question blank.
6. You can edit the dropdown menu if desired. Use the grey arrows on the left to move options up/down. You may also delete options by clicking **remove**.



7. When you are done, make sure to click **Save**.

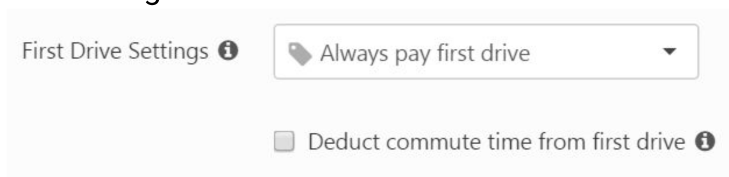
Settings
(Technicians)

First drive settings will be located in individual technician profiles (when you use clock in / clock out features)

Account configuration required ✷

When you configure your account for technician clock in / clock out, the *Include first driving time* checkbox will be removed from the *Technician Timesheet Summary Report*.

First Drive Settings and the ability to **Deduct commute time from first drive** will be located in individual technician profiles (Settings > Technicians > Payroll). This will make it possible for accounting users to control technician payroll, without needing to access business unit settings.



➔ Note: **First Drive Settings** will dictate whether or not first driving time is included in working hours on the *Technician Timesheet Summary Report* as well as the *Technician Activity Detail Report*.

Settings
(Billing)

Invoice and *Payments* tabs added to Billing

Highly requested feature ✢

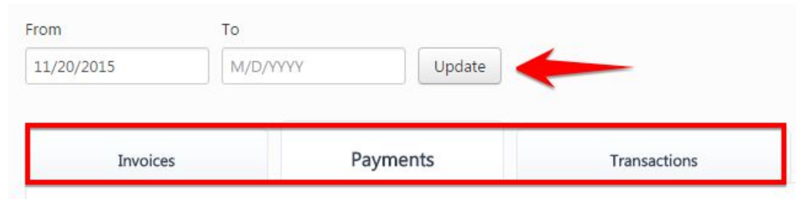
Automatically turned on

When you navigate to Settings > Billing, you will now see three tabs: *Invoices*, *Payments*, and *Transactions*.

Important Note:
No action is required on your part. There has been no change to ServiceTitan invoicing (your billing will be processed automatically every month, as it always has). These new billing features are for your convenience, to provide an easier-to-use format for reviewing your ServiceTitan billing history.

Adjust the billing history date range

At the top of the billing tabs, you'll be able to set the date range, so you can see your billing history for any desired period. Note: The date range will apply to all three tabs.



Descriptions of billing tabs

Invoices

The *Invoices* tab will provide you with a quick and easy summary of all your ServiceTitan fees for each calendar month. If you are on non-managed tech pricing, the *Invoices* tab includes monthly transactional invoices summarizing all your ServiceTitan fees for the calendar month. Note: You may click into any invoice to view the full invoice. Click the **Printer** icon to print the invoice, or download in PDF format.

Payments

The *Payments* tab provides a history of your payments to ServiceTitan.

Transactions

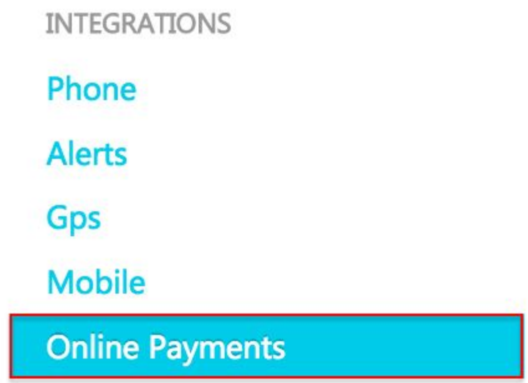
Use the *Transactions* tab to see the transaction history for your ServiceTitan account, as you have always been able to do. At the bottom of the Transactions tab, you will find a summary of each transaction type. The summary will include all transactions for the date range you have set.

Settings
(Business Units)

Online Payments added to settings menu (moved from Business Units settings)

Automatically turned on

You will notice that there is a new menu item in your ServiceTitan settings. *Online Payments* has been added to the settings menu under *Integrations*. *Online Payments* contains payment processor settings and bank accounts (ACH) settings.



If you have a payment processor configured for your account, such as WorldPay or Authorize.net, you will notice that these settings are now located in *Online Payments* under the *Credit Cards* tab.

These settings were previously located under *Business Units* (Settings > Business Units > CC integration tab). The *CC integration* tab has been removed from Settings > Business Units.

Important Note: No action is required on your part, and there has been no change to your payment processor settings. This is a reorganization of the settings menu only. No functionality has changed.

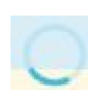
Settings
(General)

The page loading graphic has changed

Automatically turned on

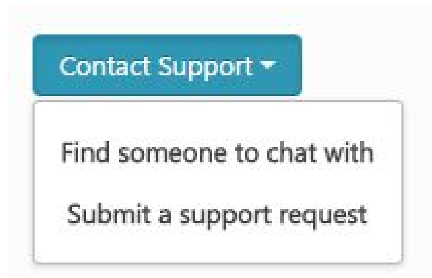
Previously in ServiceTitan, you would see three bars as a page loads.

This graphic has been updated. Now you will see a spinning circle graphic as a page loads.

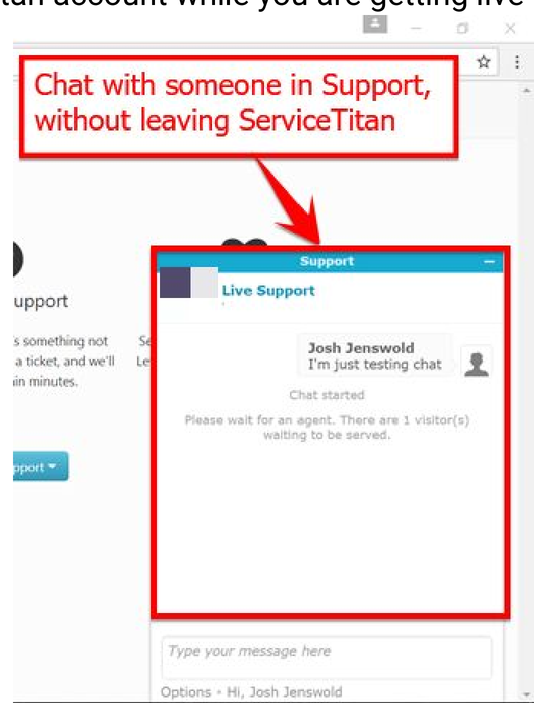


Please note: This is a design update only. No functionality has changed.

Support	Chat with Support directly within ServiceTitan *Automatically turned on*	When you use ServiceTitan, you can chat live with someone from Support by clicking **Help** from the top navigation menu. Once you are on the **Help** screen, click **Contact Support** and select *Find someone to chat with*. A chat window will open up, allowing you to get immediate live help.



From now on, when you chat with someone in Support, the chat pop-up will open directly in ServiceTitan, instead of in a new window. This will allow you to view your ServiceTitan account while you are getting live help.



We hope you enjoy these new features and improvements!

Should you have any questions, please do not hesitate to contact your Implementation Specialist or Success Manager.