ServiceTitan®

Training
CSR 101

Objectives

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

- Click the green bubble to accept an inbound phone call
- Create or update a customer record
- Schedule a job

Goals

My goals for this session are:

_____

_____

Table of Contents

Call Bubbles

What does the number in the orange box mean?

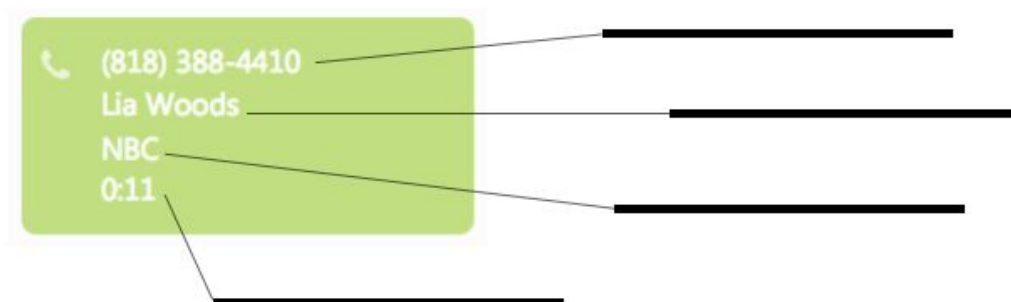_____

_____

What does an incoming call look like? Circle one of the below.

Call Playback download

Time	From
1:32 PM	(818) 787-1235
10/10/2016	Max Ambrose

Calls

(855) 899-0970
Tom Customer
AT&T
0:24

Green bubble

+

Calls

(855) 899-0970
Tom Customer
AT&T
0:21

Gray bubble

+
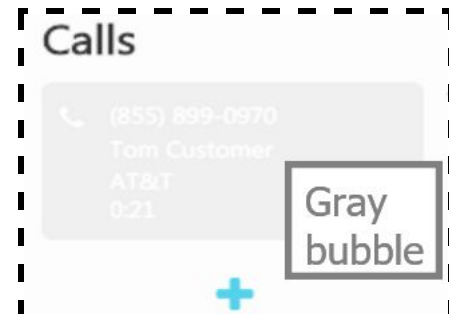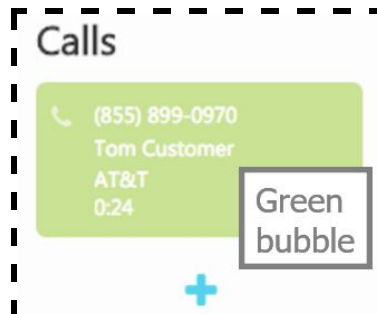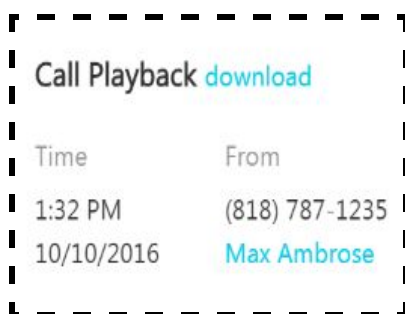
Can you identify everything below?

(818) 388-4410
Lia Woods
NBC
0:11

_____

_____

_____

_____

What is the purpose of clicking the **green bubble**?

_____

What happens **after** you click the **X** in a call bubble (close out the call)?

_____

True or False
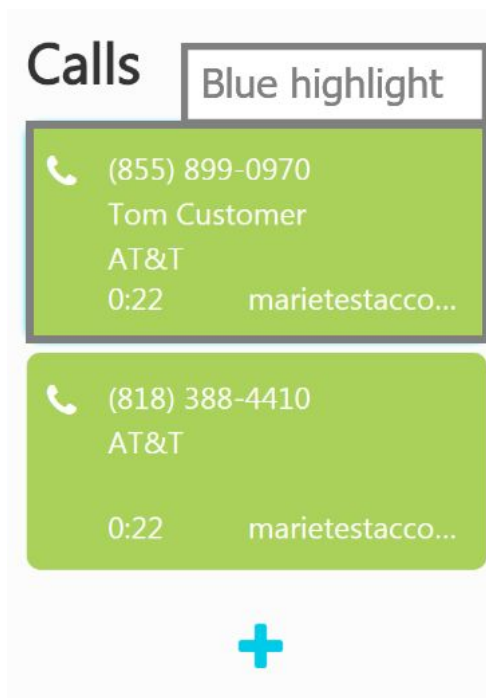
|	
When there is a blue highlight around a call bubble, that means I need to pick up the call within 10 seconds.	_True / False_
If I click on another call, the call I'm currently on will be put on hold until I come back to it.	_True / False_
Someone else in the office can click on a call I've answered, to take over the call.	_True / False_
ServiceTitan allows me to multitask.	_True / False_

Manual Calls

Calls
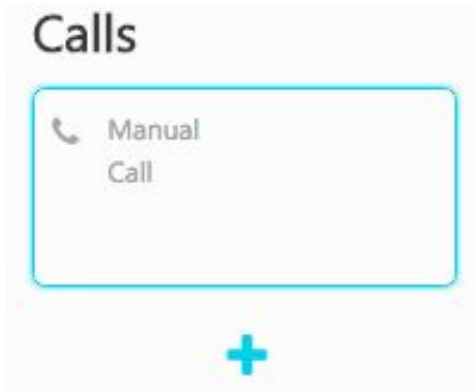
Manual Call

What is the **Manual Call** bubble used for?

_____

_____

Scheduling

When I click **Show calendar . . .**

Show calendar

Where does this take me? (circle one of the below)

Schedule   Dispatch

Booking a Job

How do you book a job while you are on the phone with an **existing customer**? Circle the correct steps below.

Step One

Circle the correct step below:

Click on the incoming call. Then, click on the location the customer is calling about.

Which one is correct?

*Use **Search** to navigate to the customer's record.*

Step Two

Circle the correct step below:

Tell the customer you'll call back if a technician is available.

Which one is correct?

Get information from the customer,

Job Type

Then enter job details.

Step Three

Circle the correct step below:

You can check on technician availability while on the phone with the customer.

Schedule   Dispatch

Or, just skip this step for now (you can always assign a technician later).

Which one is correct?

Call the customer back to see what kind of job it is.

What's the final step when you book a job?

C __ __ C K __ O __ K   J __ __

True or False

Every time I answer an incoming call, I should click the incoming call bubble.	*True / False*
If I answer a call, but do not click on the incoming call bubble, ServiceTitan will classify the call as an abandoned call.	*True / False*
Any call in ServiceTitan can be re-classified.	*True / False*
After a call has ended, the call can still be re-assigned to another CSR (even if a job was booked).	*True / False*
If I forget to click on an incoming call, the call will still be recorded.	*True / False*

Notes:

Adding Addresses

| 👤 Name ... | 🏠 Street ... | 🏠 Unit ... | 📍 Zip ... | 📞 Phone ... | 🔍 Search | ✚ New |

Use the filters above to search for the caller.

Job Details

Job Type	Business unit	Date	Time
▼	▼	10/11/2016	5:00 PM

Marketing Campaign	Priority	Technician
▼	▼	

Tags

Draw an **arrow** ↗ where you would click to add a **new customer who has never called in before**.

| 👤 caruso | 🏠 Street ... | 🏠 Unit ... |

👤 Tom Caruso

🏠 928 Richard Place, Glendale, CA 91206 USA

🏠 52 Cezanne, Irvine, CA 92603 USA

Why are there two different addresses for Tom Caruso?

A. One of the addresses is an old address.

B. One of the addresses is his billing address, the other is the service location address.

C. This is an error. The customer record should be corrected.

D. This customer has two service location addresses.

Where will the service be performed?

caruso

Address...

Unit...

MobilePhone ...   Memo...   ✕

Email ...   Memo...   ✕ ✚

Save   Go back

Who will pay for the job?

The customer is the same as the tenant ▾

Residential   Commercial

> Where do you click to add a separate billing address?

Draw an **arrow** ↗ where you would click to add a **separate billing address**.

Why is it important to **validate** an address?

_____

If I am trying to enter an address and Google can't find it, what should I do?

A.   Skip entering the address.

B.   Check to make sure I have the correct address before entering it into the system.

C.   Click **Enter manually** to enter the address without Google verification.

D.   Both B and C are correct.

Memberships

How can you look up a customer's upcoming membership visits, including appointments that still need to be scheduled? Circle all that apply.

Follow Up — Use the *Upcoming Appointments* tab on the **Follow Up** screen	**Calls** — Click on the location from the **Calls** screen, and scroll down to *Recurring Events.*
Reports — Run the *Membership Appointment Report* or *Recurring Service Report*	**Search** — Navigate to the **location** record, and scroll down to *Recurring Events*.
Dispatch — Go to the dispatch board, and click on *Future* jobs.	**Schedule** — Go to the schedule board, and filter by job type.

Notes:

Outbound Calling

How do you place an outbound call?

Step One
Circle the correct step below:

	Dial the customer's number.	**Which one is correct?**	(855) 899-0970 Mobile Phone *Click on the customer's number.*

Step Two
Circle the correct step below:

	Your office phone will ring.	**Which one is correct?**	*The customer will call you.*

Step Three
Circle the correct step below:

	Pick up your phone. You are now connected to the customer.	**Which one is correct?**	PHONE RINGS DON'T ANSWER

Managing Calls

Call Playback download

Time	From	To	Duration	Job
3:01 PM	(855) 899-0970	(424) 373-6237	3m 25s	N/A
10/7/2016	Tom Caruso	AT&T	marie	

Tags

Forms

Home Inspection Form

00:05   03:23

ServiceTitan determined this was a service request that marie did not book.

✔ Correct   I'd like to reclassify the call

List **four** different things you (or your manager) can do when clicking on a call.

Who will do this?

1. _____ *Me / Manager*

2. _____ *Me / Manager*

3. _____ *Me / Manager*

4. _____ *Me / Manager*

Recap

How do you book a job for a customer? List the main steps (feel free to enter additional steps according to your company's best practices).

_____

_____

_____

_____

_____

_____

_____

Notes: