Release Notes

March 31, 2017

New Features & Improvements

✢ Highly requested features are noted

New Feature Spotlight

Memberships enhancements: Selling memberships & membership add-ons ✢

Customer Communications enhancements: Booking confirmations and arrival windows ✢

More New Features & Improvements

Call Booking

Display warning when CSR overbooks jobs (Technician Capacity Planning) ✢

When a customer requests an appointment online, the booking confirmation email will become part of the job history

Customer Communications

Send automatic booking confirmations by email or text ✢

There will no longer be a limit to the number of photos you can attach to an email ✢

Customers will now receive an arrival window (when you turn on appointment reminders or booking confirmations)

Dashboard & Scorecards

Dashboard drilldown: See a detailed breakdown of data for each KPI ✢

Updates to the job list on the technician scorecard: It will be easier to compare the technician's job list to information on the dashboard

Invoices & Estimates

Introducing TURNS financing for ServiceTitan Mobile ✢

Memberships

Mobile 2.0

When you view projects, instead of a Pay Balance button you will see three blue dots

Credit card fields will no longer display if the business unit is not set up for credit card processing

When you sell/convert an estimate, the button will say Sell (not Sign)

Updates to clock in clock out: Improved view for scheduled events

Design Update: Members savings amounts are now bright green

Payroll

Worker's compensation reporting: enter classification codes on job types

The bill to customer name will now appear on payroll adjustments (Payroll Detail Report)

Ability to enter a technician's union, see the union for a job, and view union payroll

Projects

Single invoice for projects in Mobile 2.0: Configure your account so technicans working on a project will see the project invoice ✢

Create a project on the customer or location record, before a job has been booked ✢

Add a payment to multiple invoices through the project screen ✢

Columns added to Projects search export: Use the export to see a detailed breakdown of all your projects ✢

Reports

The Technician Activity Detail export will now display data in hours (including decimal for minutes), not 00h 00m

Improvements to Dispatch Performance Report

New Report: Failed Transaction Report ✢

Search

Settings (Business Hours)

Settings (Job Types)

Settings (Permissions)

New Feature Spotlight

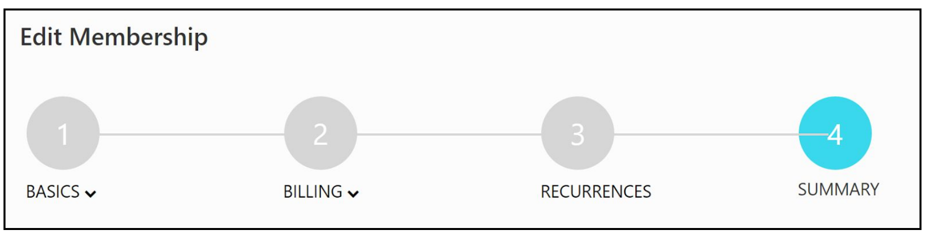
Memberships enhancements:
Selling memberships & membership add-ons

Account configuration is required to use membership add-on features

ServiceTitan has enhanced memberships features, making it easier than ever to sell memberships and membership add-ons.

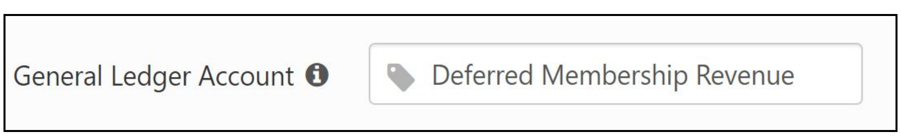
The Memberships Wizard will walk you through the memberships setup in four easy-to-use steps

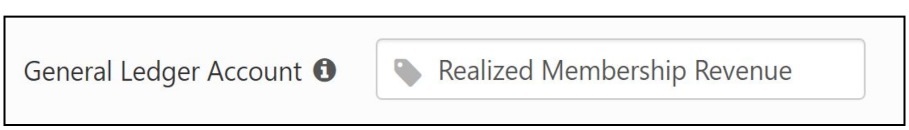
To access the *Memberships Wizard*, go to Settings > Membership Types.



You can set up the membership for **deferred revenue**, or to **realize revenue at the point of sale**

You can go directly into the Pricebook to map membership tasks to a Quickbooks liability or income account (*General Ledger Account*). More information about setting up deferred revenue is available in ServiceTitan Help - see the documentation links below.





You can set up **membership add-ons**, which will allow you to **sell customized membership plans**

Common uses for membership add-ons include:

➢ Additional monthly charges.

➢ Additional systems.

➢ Opt-ins for extra maintenance tasks.

➢ Membership upgrades for additional services.

When you sell the add-on, **add-on charges will be rolled into the membership price**

When you create the initial membership invoice, you will check *This is an add-on task*. Then you will select the membership as the *Parent Task*. Add-on charges will be rolled into the membership price (the customer will not see the individual price of the add-on).

Description	Quantity	Unit Price	Total
HVAC Membership includes:	1.00	$129.00	$178.00
Cooling Tune-Up in Spring Heating Tune-Up in Fall			
Plumbing Check-Up	1.00	$49.00	$0.00

➢ If this is a one-time charge membership, the membership and add-on charges will be for the full price of the membership.

➢ If there is membership billing, these are up front charges only (but you can also roll add-on charges into the billing template - see below).

You can also **roll add-on charges into membership billing**

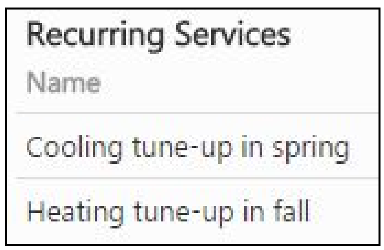
If there is an extra billing charge for the add-on, the billing template will be automatically adjusted - all you have to do is sell the add-on on the initial membership invoice.

You can **choose how add-on services will be added to the membership**

There are two ways to roll add-on services into the membership.

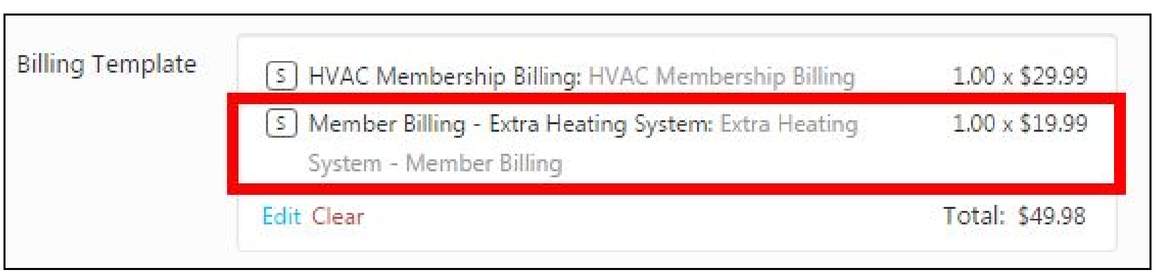
Option 1 - Add a new recurring service

The add-on can set up to create an additional recurring service on the membership (for example, the customer opts in for cooling maintenance in the spring).



Option 2 - Add to an existing recurring service

The add-on can be set up so it will be added to an existing recurring service (for example, two different heating systems need to be serviced for a duplex).



You can also **create add-ons for extra billing charges**

You can also create add-ons simply to add charges to the billing template (no services will be added to the membership).

ServiceTitan will help you **track upcoming appointments**, **follow up on membership renewals**, **process membership billing**, and review many kinds of **membership reporting**

Basic memberships workflows
Track & schedule upcoming appointments *You can use the Upcoming Appointments tab on the **Follow Up** screen to track upcoming appointments and book membership services.* *You can also book services by navigating to the location. The customer's upcoming appointments are listed in **Recurring events**. Click on any event to book the service.*
Sell membership renewals *You can use the Expiring Memberships tab on the **Follow Up** screen to generate renewal estimates, follow up on renewal estimates, and sell/convert renewals. Or, you can add the membership renewal task to any customer invoice.*
Process membership billing *You can process membership billing on the **Invoice** screen. Click **Charge Members** to generate membership invoices and process billing.* ➢ *If the customer has a payment method set on the membership, the customer will be automatically charged.* ➢ *If the customer does not have a payment method on the membership, an invoice will still be generated (so you can send the bill to the customer).*

*Note: For the customer to be charged, their preferred payment method must be entered on the membership (Navigate to the Customer or Location > Click on the membership > Click the **Edit Pencil** > Enter the Preferred Payment Method > Click **Save**). Do this only if the customer wants their credit card / bank account to be automatically charged for membership billing.*

Membership reporting

*Click **Reports** from the top navigation menu for membership reports. Popular reports include the Membership Sold By report (overview of membership sales) and the New Member Report (list of new members).*

Guide to Memberships

The following reference guides will walk you through memberships features in ServiceTitan, including how to set up memberships with add-ons and how to manage your existing memberships.

Note: A membership in ServiceTitan is the same as a maintenance plan or service agreement.

Setting Up Memberships

Go here for:
- ➢ Understanding membership settings in ServiceTitan
- ➢ Types of memberships you can set up in ServiceTitan
- ➢ Guide to the Memberships Wizard

How to Set Up Membership Add-Ons

Go here for:
- ➢ How to create a membership add-on
- ➢ How to automatically roll add-on charges into the billing template
- ➢ How to create an add-on so it adds a new recurring service to the membership
- ➢ How to create an add-on so it appears on an existing recurring service (the add-on would be for a service already included with the membership, that's being expanded or upgraded)

How to Set Up Deferred Revenue

Go here for:
- ➢ How to create deferred revenue tasks (+/-) in the Pricebook
- ➢ How to set up recurring service invoice templates for revenue recognition
- ➢ How to configure your account to automatically calculate deferred revenue amounts
- ➢ How to do your own calculations for deferred revenue

Setup Guides by Membership Type

These reference guides will help you understand the Pricebook tasks, recurring service types, and invoice templates you are setting up in the Memberships Wizard. These guides will also walk you through any additional setup required for your membership.

Go here for:
- ➢ Membership paid up front, revenue is deferred
- ➢ Membership paid up front, revenue is realized at the point of sale
- ➢ Membership has recurring billing, revenue is deferred
- ➢ Membership has recurring billing, revenue is realized at the point of sale

Selling Memberships & Managing Existing Memberships

Go here for:
- ➢ How to sell a new membership & add-ons
- ➢ How to make changes to a customer's membership
- ➢ How to sell membership renewals
- ➢ How to schedule upcoming membership appointments
- ➢ How to process billing
- ➢ Membership reporting

These memberships features can also be turned on for your account:

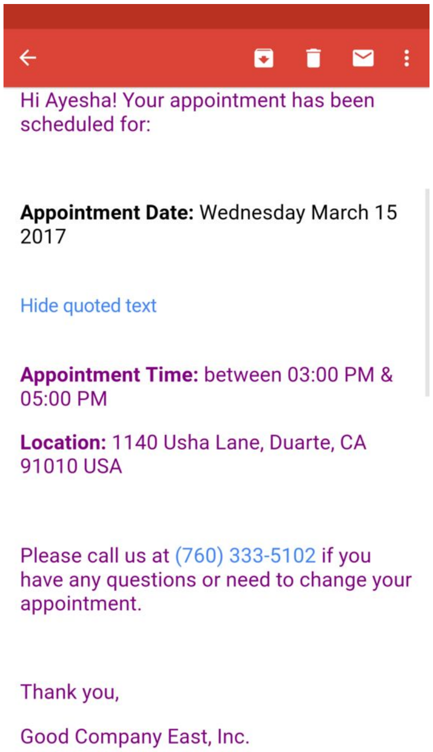
- How to customize *Opportunity Status* features on the *Expiring Memberships* tab
- How to adjust the job duration of recurring services when you sell membership add-ons

Related Articles:

How to charge members for recurring / monthly billing
How to update a customer's stored payment methods

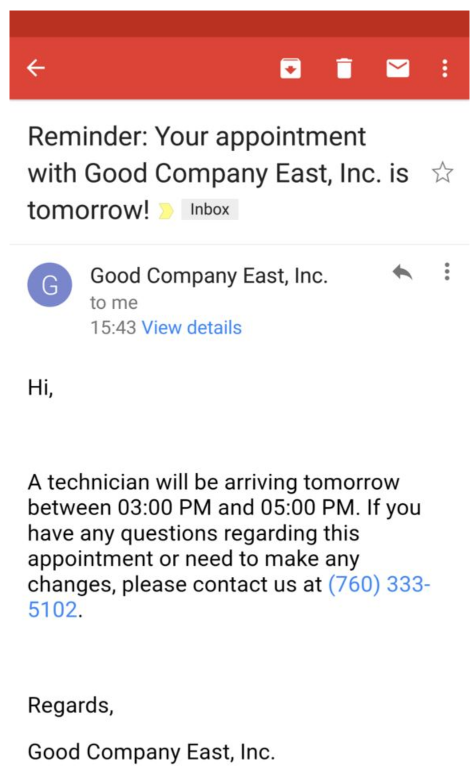
Customer Communications enhancements: Booking confirmations and arrival windows

Read the *Customer Communications* section below for more information on these enhancements.



You can now enable automatic **booking confirmations** by email or text

When you enable booking confirmations, every time a job is booked ServiceTitan will automatically send out an appointment confirmation to the customer.



Your **business hours table** will now be used to provide customers with an ***arrival window***

When you enable booking confirmations or appointment reminders (Settings > Communication Settings), your business hours table will now be used to provide customers with an arrival window.

New Features & Improvements

✷ If the feature requires configuration, please contact your Success Manager or Implementation Specialist to turn on the feature in your account.

Call Booking

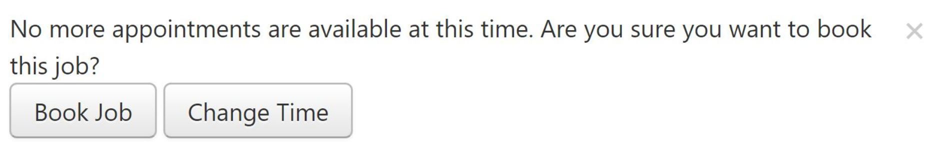
Display warning when CSR overbooks jobs (Technician Capacity Planning)

✷ *Account configuration required*

Overview

If you have set up technician capacity planning features, you will now be able to create a warning message if a CSR attempts to book a job that is over technician capacity.

When the *Open Capacity Table* shows that 0 technicians are available for any given time slot, the CSR will see the following warning if they attempt to book a job within that time:



- To proceed with booking the job, the CSR will need to click **Book Job** within the warning message. Otherwise, the CSR will click **Change Time** and schedule the job for an available time slot.

- The same warning will display if a CSR attempts to reschedule any job for that time slot.

Required Setup

Open capacity features (the *Open Capacity Table, Technician Availability Table, Forecast Demand*) are not enabled by default. To enable capacity planning, contact your Implementation Specialist or Success Manager.

Instructions / FAQs

How do I turn on the “over capacity” warning?

Go to Settings > Business Hours > Check Display warning when CSR overbooks jobs > Click Save.

How do I set up capacity planning?

Please refer to the documentation link below.

Documentation Links

- Technician capacity planning

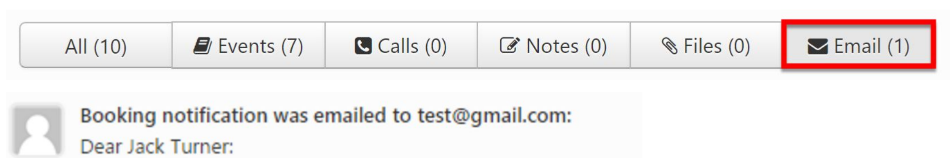
When a customer requests an appointment online, the booking confirmation email will become part of the job history

✷ *Account configuration required*

Overview

When a customer uses the web appointment scheduler to request an appointment, ServiceTitan automatically sends an email confirming the customer's appointment request.

When you book a job for a web appointment request, the booking confirmation will now be recorded in the *Email* tab of the job history.



Required Setup

The web appointment scheduler is not enabled by default. To enable this feature, contact your Implementation Specialist or Success Manager.

Instructions / FAQs

What's in the email that gets sent to the customer?

When you set up the web appointment scheduler, you will create a template for the confirmation email.

Documentation Links

- Setting up the web appointment scheduler

Customer Communications

Send automatic booking confirmations by email or text

Automatically available

Overview

When you enable booking confirmations, every time a job is booked ServiceTitan will automatically send out an appointment confirmation to the customer.

➢ You may enable booking confirmations by email or text.

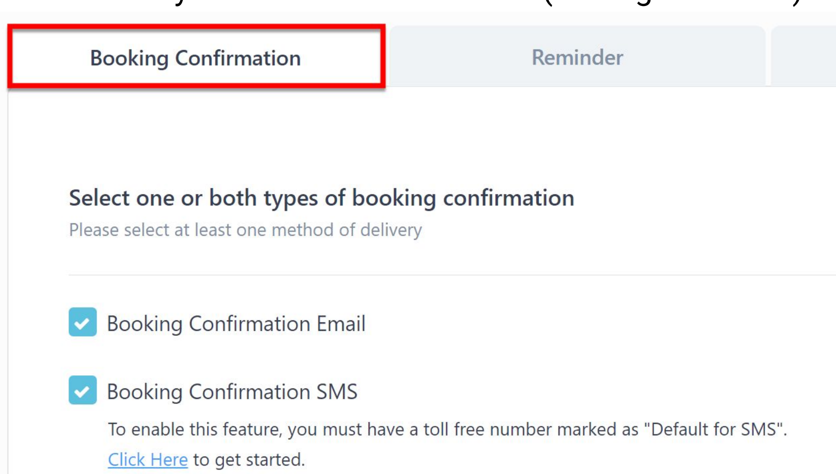
Note:

➢ The booking confirmation will be sent *only if the customer has notifications turned ON (look for the green bell next to the customer's email/phone).*

Instructions / FAQs

How do I enable booking confirmations?

1. Go to Settings > Communications Settings.
2. Click the *Booking Confirmation* tab.
3. Check *Booking Confirmation Email* or *Booking Confirmation SMS* as desired.
    a. If you choose *SMS*, you must set up a toll free number as your default SMS number (Settings > Phone).



Documentation Links:

- See the guide to Customer Communications.

There will no longer be a limit to the number of photos you can attach to an email

Automatically available

Overview

Currently in Service Mobile and ServiceTitan desktop, there is a limit of approximately 10mb for email attachments. From now on, there will be no limit to the number of images you can email to a customer.

If the attachments are too large, the email will contain image links instead of the actual files.

- If the attachments are more than 10mb, ServiceTitan will automatically create image links.
- When the customer receives the email, they will be able to click on the links to access the images.
- The customer will be able to copy or save any image.

Customers will now receive an arrival window (when you turn on appointment reminders or booking confirmations)

Automatically available

Overview

When you enable booking confirmations or appointment reminders (Settings > Communication Settings), your business hours table will now be used to provide customers with an arrival window.

Instead of receiving the exact start time for the scheduled job, the customer will receive an arrival window according to your business hour time slots (Settings > Business Hours).

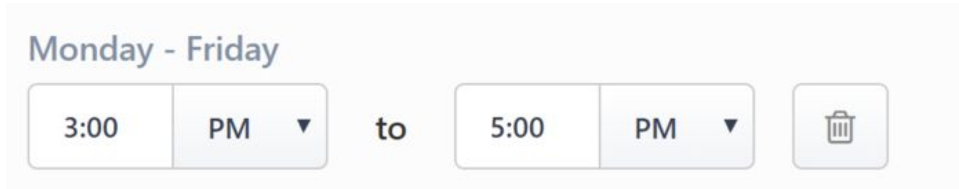
Note:

- This change will happen automatically if you have enabled booking confirmations or appointment reminders. No action is required on your part.

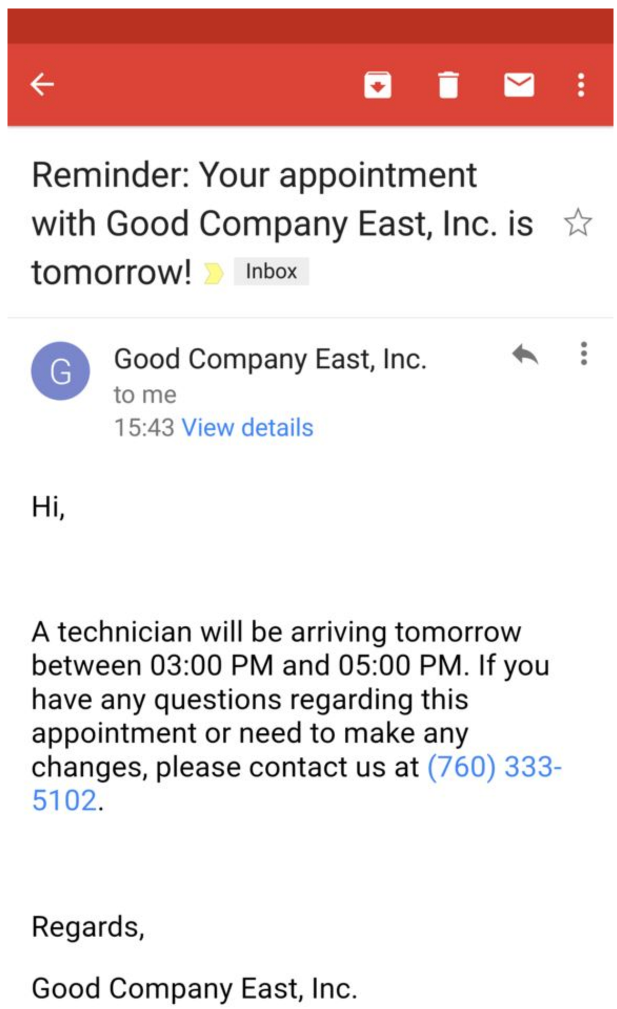
Example of how arrival windows work:

- A customer has a job booked for 3:00pm on Monday.

➢ In your business hours table, you have a time slot set up for 3:00pm to 5:00pm, Monday-Friday.



When the customer receives a booking confirmation or appointment reminder, the message will provide an arrival window of 3:00pm to 5:00pm:



What if I have not set up my business hours table?

If you have not set up your business hours table in Settings > Business Hours, ServiceTitan will calculate the arrival window based on the *Duration* entered for the job type (Setting > Job Type > Duration). The customer's arrival window will begin with the scheduled time for the job (the window will then be set by the job duration).

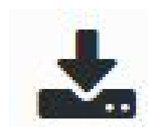
Dashboard & Scorecards

Dashboard drilldown: See a detailed breakdown of data for each KPI

Automatically available

Overview

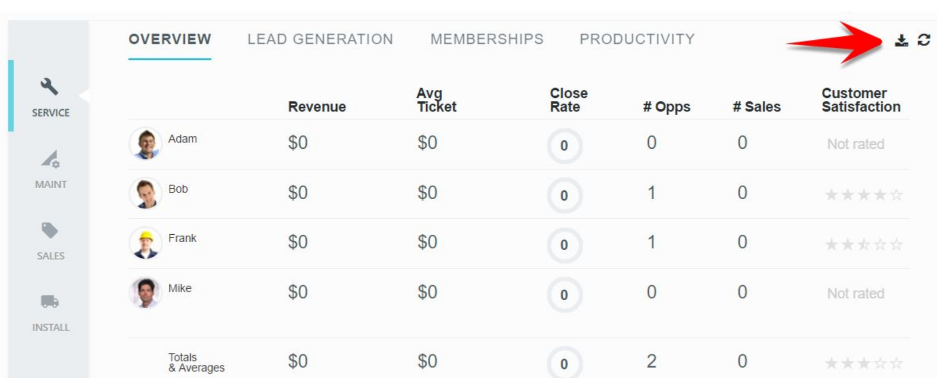
You can now download a drilldown of dashboard KPIs in Excel (.xlsx) format. If you want to see a breakdown of invoice / estimate / job data, simply download the drilldown.



Instructions / FAQs

How do I download the dashboard drilldown?

The **Download** button is located in the top right corner of your business unit KPIs (the *Maintenance, Service, Sales,* and *Install* section).



What does the drilldown look like?

The drilldown is an Excel document. The Excel document will be organized by dashboard section (see tabs/sheets at the bottom). Within the Excel document, you'll see all the data used for KPIs within that dashboard section.

Invoice Number	Revenue	Technician	Split	Above Sold Threshold	Convertible
A1528623	15500.00	Bob	100.00	yes	yes
A1528655	0.00	Frank	100.00	no	yes

Documentation Links

- Click here for the *Dashboard Drilldown* help article.
- Click here for *Dashboard KPIs*, which explains how every metric on the dashboard is calculated.

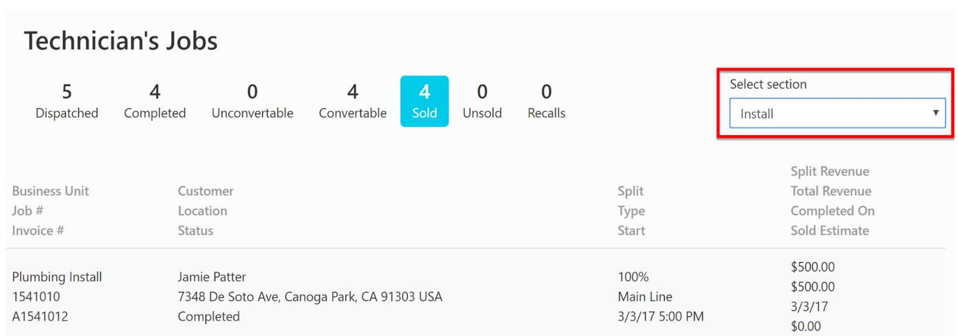
Updates to the job list on the technician scorecard: It will be easier to compare the technician's job list to information on the dashboard

Automatically available

Overview

New filter allows you to choose a dashboard section

When you view the job list on the technician scorecard, you will now see a *Select section* filter.



Updates to the Sold jobs list

The *Sold* job list has been updated, to better match information on the dashboard.

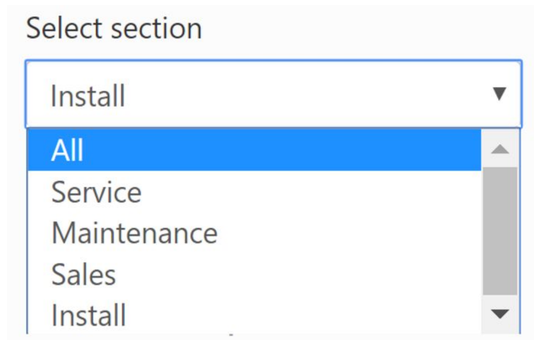
- *Sold* jobs will include all estimates sold within the dashboard date range, regardless of whether the estimate amount is above or below the sold threshold.
- *Sold* jobs will be filtered by the estimate sold date (not the job completion date).

To reach the technician scorecard, click on any technician from the dashboard.

Instructions / FAQs

How do I use the job list filter?

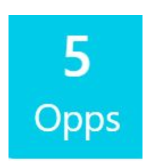
The job list filter will include options for *All, Service, Maintenance, Sales*, and *Install*. Choose any of these sections to view the technician's jobs that fall under that section of the dashboard.



For example, if you select *Service* you will see a list of the technician's jobs that fall under business units mapped to the *Service* section of the dashboard.

➢ When you select *Service, Maintenance,* or *Install* you will be taken to *Completed* jobs. The completed jobs list will be filtered according to the section you selected.

➢ When you select *Sales* you will be taken to a new section called *Opps*. This section will list sales opportunities / leads (jobs dispatched), based on the dispatch date.



Invoices & Estimates

Introducing TURNS financing for ServiceTitan Mobile

✷ Account configuration required

Overview

You can now integrate your ServiceTitan account with TURNS, which will allow customers to apply for TURNS financing directly within ServiceTitan Mobile.

- ➢ Technicians will be able to walk customers through the loan application process within ServiceTitan Mobile.
- ➢ Eligible customers will be able to accept their approved loan immediately.
- ➢ Once the customer is approved for a loan, TURNS can be used as a payment method within ServiceTitan Mobile or from the office.

Required Setup

These features are not enabled by default. Contact your Implementation Specialist or Success Manager for details.

Instructions / FAQs

Why should I offer TURNS as a financing option?

When you offer your customers financing options that meet their needs and credit criteria, technicians hear "yes" more often to high-cost jobs. This can often lead to a significant boost in revenue.

Documentation Links - For the office:

- ➢ Click here for *How to set up TURNS financing*.

Documentation Links - For technicians:

➢ [Click here for *How to walk a customer through the TURNS application process (ServiceTitan Mobile)*.]

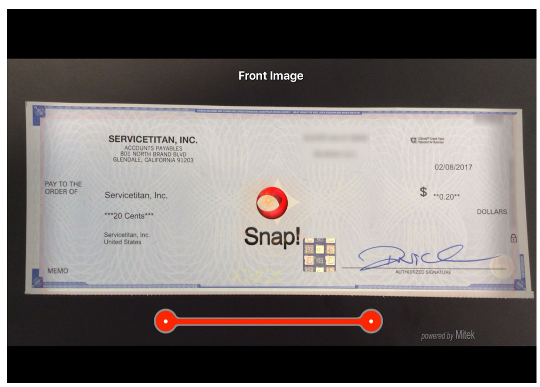
Mobile check capture now available with ServiceTitan Payments

✸ *Application required & Account configuration required*

Overview

ServiceTitan has partnered with industry leading payment processors to offer a fully integrated payments solution. ServiceTitan Payments allows you to process credits, bank transfers, and checks from the office or out in the field in ServiceTitan Mobile.

ServiceTitan Payments now comes with *Mobile Check Capture*. *Mobile Check Capture* allows technicians to take a photo of the check to process it.



Instructions / FAQs

How do I sign up for ServiceTitan Payments?

Please see the documentation links below.

Documentation Links

- Getting Started with ServiceTitan Payments
- ServiceTitan Payments - Overview

New loan option available from GreenSky

✷ To sign up for GreenSky, contact your Implementation Specialist or Success Manager

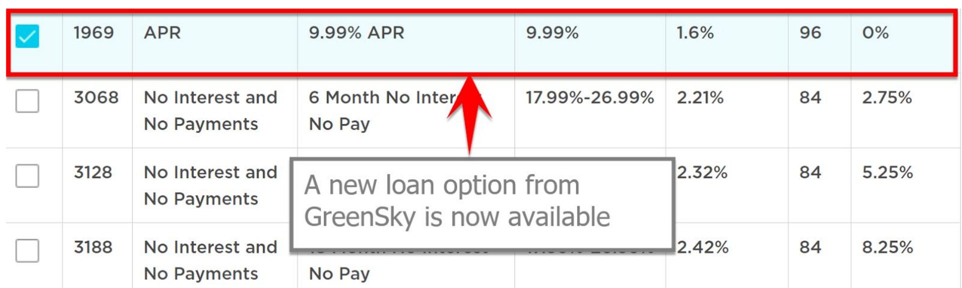
If you already have GreenSky, the payment calculator will be automatically available.

Overview

When your account is integrated with GreenSky, customers will be able to apply for financing directly in ServiceTitan Mobile. With GreenSky, you have the ability to select up to three loan options to offer to your customers.

A new loan option is now available from GreenSky with the following terms:

- 9.99% APR
- 96 Month Term
- 1.6% Payment Factor
- **No Dealer fee**



Instructions / FAQs

How do I set up GreenSky loan options?

Please refer to the documentation link below for setup information.

How do I sign up for GreenSky?

Contact your Implementation Specialist or Success Manager for questions about GreenSky. You will sign up with GreenSky® at: https://www.greenskycredit.com/sponsor/servicetitan.

Documentation Links

- How to set up integration with GreenSky

Hide payment types from use in Mobile

Automatically available

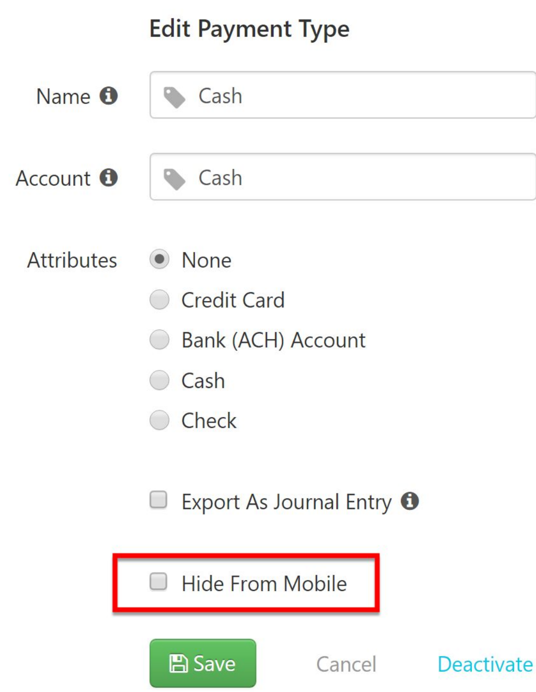
Overview

You can now hide any payment type from appearing in Mobile, so it will be available for office use only.

Instructions / FAQs

How do I hide a payment type from Mobile?

Navigate to Settings > Payment and Invoice Types > Click to Edit Payment > Check Hide From Mobile > Click Save.



Will Hide From Mobile be turned on or off by default?

Hide From Mobile is turned off by default for all payment types. This means that all of your payment types are visible in Mobile by default. You can navigate to any payment type to turn on *Hide From Mobile*.

Edits to the cost or quantity of materials will now appear in the job audit trail

Automatically available

Overview

When any changes are made to the *Cost* or *Quantity* of a material item on invoices/estimates, this change will be automatically recorded as part of the job audit trail.

Instructions / FAQs

The job audit trail can be found on the job page (Search > Job) under *History*.

Memberships

Recurring services can repeat within a specified number of days (30, 60, 90 days, etc.) & You can set recurring services to auto-adjust the next appointment date

Automatically available

Overview

Some states require that certain services, like grease trap cleanings, must be performed within a 30, 60, or 90 day period. Those who fail to do so can get fined.

When you set up your recurring service types (Settings > Recurring Service Types) you can now set the *Recurrence Type* to **Daily**. The *Recurrence Interval* can be used to specify the number of days.

In addition, you can also set recurring services to auto-adjust the next appointment date, based on the actual date of completion of the last appointment.

Instructions / FAQs

Repeat recurring services within a specified number of days

Go to Settings > Recurring Service Types. Set the *Recurrence Type* to **Daily** and enter the number of days in **Recurrence Interval**. Click **Save**.

For example, if you enter a *Recurrence Type* of **Daily** with a *Recurrence Interval* of 30 days, a recurring service appointment will be generated every 30 days.

Set recurring services to auto-adjust the next appointment

A new setting has been added to recurring service types called *Auto-adjust events based on previous completion date*.

To enable, go to Settings > Recurring Service Types > Check *Auto-adjust events based on previous completion date* > Click **Save**.

When auto-adjustment is enabled you will see a change in how upcoming appointments are generated for this recurring service.

- ➢ Only one recurrent event is generated at a time (instead of generating the whole series). If a recurring service is completed ahead of schedule, the next event will be generated according to the interval set on the recurring service.

- ➢ Note: Existing non-adjusting recurring services cannot be converted into auto-adjusting services. Only new recurring service types can be set to auto-adjust.

Overview

In ServiceTitan, the *Expiring Memberships* tab on the **Follow Up** screen is used to track membership renewals and sell renewal

Customize *Opportunity Status* features on the *Expiring Memberships* tab

✸ *Account configuration required*

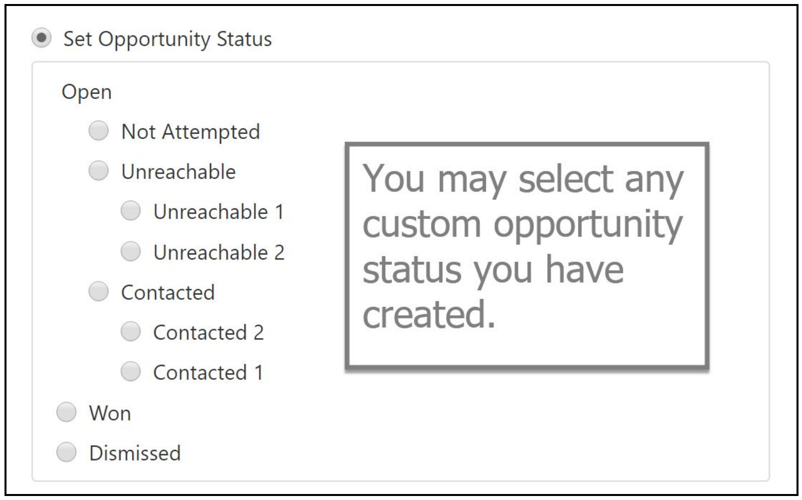
estimates.

Some companies use their own methods for tracking membership renewals. If this applies to your business, ServiceTitan now offers features that will support whatever renewals process you have in place.

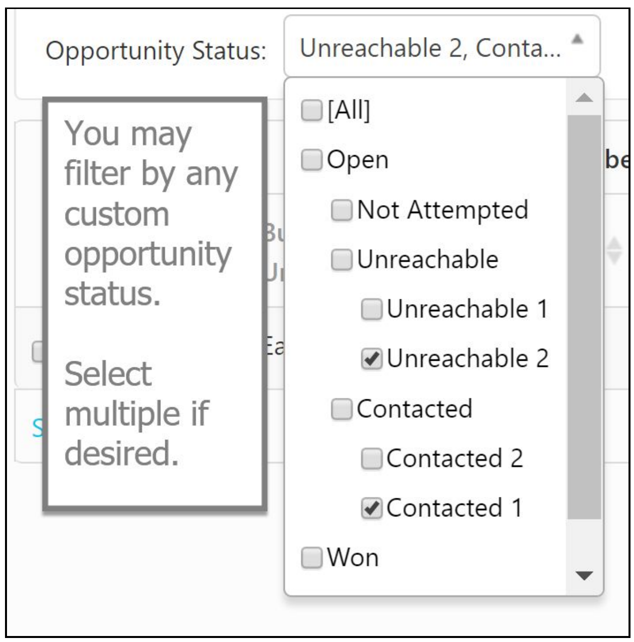
These new features will allow you to:

➢ Create a custom *Opportunity Status* for renewal opportunities.

➢ Make bulk changes to the *Opportunity Status* of renewal opportunities (you can override the *Opportunity Status* set by ServiceTitan).



➢ Filter the *Expiring Memberships* tab using any custom *Opportunity Status* you've created.



Required Setup

These features are not enabled by default. Contact your Implementation Specialist or Success Manager to configure your account.

Documentation Links

- ➢ [How to customize opportunity status features on the Expiring Memberships tab.]()

Job templates are no longer required for recurring services: Set all job details directly on the recurring service type

Automatically available

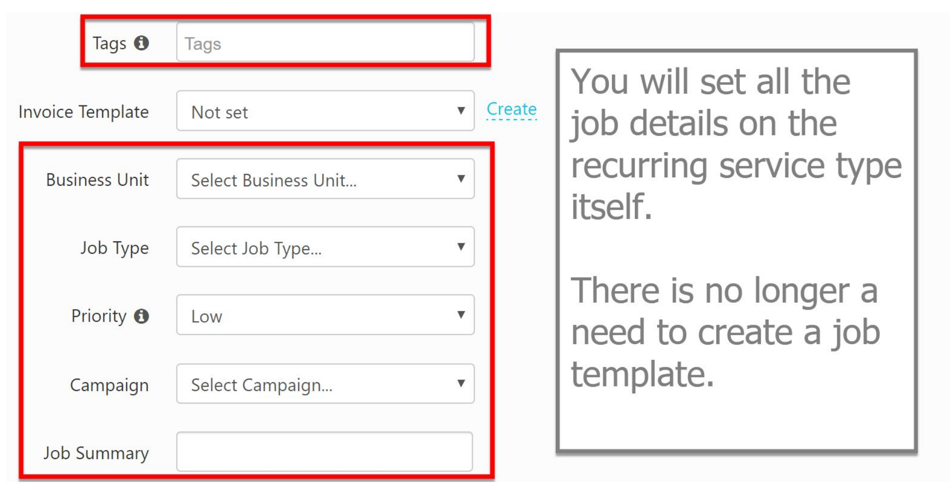
Overview

Job templates will no longer appear in Settings > Recurring Service Types

Previously in ServiceTitan, you would attach a job template to the recurring service type. From now on, recurring service types will no longer contain a job template. Instead, you will now have the ability to set all basic job details on the recurring service type itself.

The following job fields have been added to Settings > Recurring Service Types:

- ➢ Tags
- ➢ Business Unit
- ➢ Job Type
- ➢ Priority
- ➢ Campaign
- ➢ Job Summary



These job fields act just like the previous job template

Every time this recurring service is booked, all of these job fields will be prepopulated. This will save your CSRs a lot of time and reduce human error.

Instructions / FAQs

What happens to my previous job templates? Do I need to redo the setup on my recurring service types?

No, you will not need to perform any setup. No action is required on your part. If you had a job template on any of your recurring service types, these new fields will be automatically populated with the same information from the previous job template.

For example, let's say you set up a job template for HVAC Maintenance. The next time you navigate to the HVAC Maintenance recurring service type (Settings > Recurring Service Types), you will see that the *Tags*, *Business Unit*, *Job Type* and other job information have been filled in. All information will match the previous job template.

Display a credit card authorization / remittance slip on printed renewal estimates

✷ *Account configuration required*

Overview

You can configure your account to display a credit card authorization / remittance slip on printed renewal estimates.

Required Setup
This feature is not enabled by default. Please contact your Implementation Specialist or Success Manager to configure your account.

Instructions / FAQs

How do I generate renewal estimates?

You will generate renewal estimates using the *Expiring Memberships* tab on the **Follow Up** screen. See documentation links below for more information.

Documentation Links

- Selling Memberships & Managing Existing Memberships (includes instructions on renewal estimates)

You can show/hide membership savings on the invoice/project for individual customers only

✷ *Account configuration required*

Overview

If you have your account configured to show member savings on printed invoices and projects, this feature update will apply to you.

You will see a checkbox in the customer record that allows you to turn off membership savings on the invoice. This means if you do not want a particular customer to see a breakdown of their membership savings, you can simply turn off membership savings in their customer record.

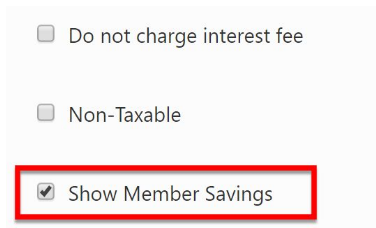
Required Setup
These features are not enabled by default. Contact your Implementation Specialist or Success Manager to configure your account.

Instructions / FAQs

Will Show Member Savings be turned on or off by default?

When show membership savings on the printed invoice/project is enabled for your account, the *Show Member Savings* checkbox will be turned on by default for all customers. You can go into any customer record to turn off *Show Member Savings*.

How do I turn off member savings for an individual customer?



Navigate to the customer record (Search > Customer). Click the **Edit Pencil** on the customer record. You will see *Show Member Savings* in the customer settings, right below the *Non-Taxable* checkbox.

Mobile 2.0

View a sales map showing where any service / equipment has been sold

✷ *Account configuration required*

You can now configure your Mobile account so a sales map will be available for equipment / services. The sales map will show all locations where the equipment / service has been sold.

Note:

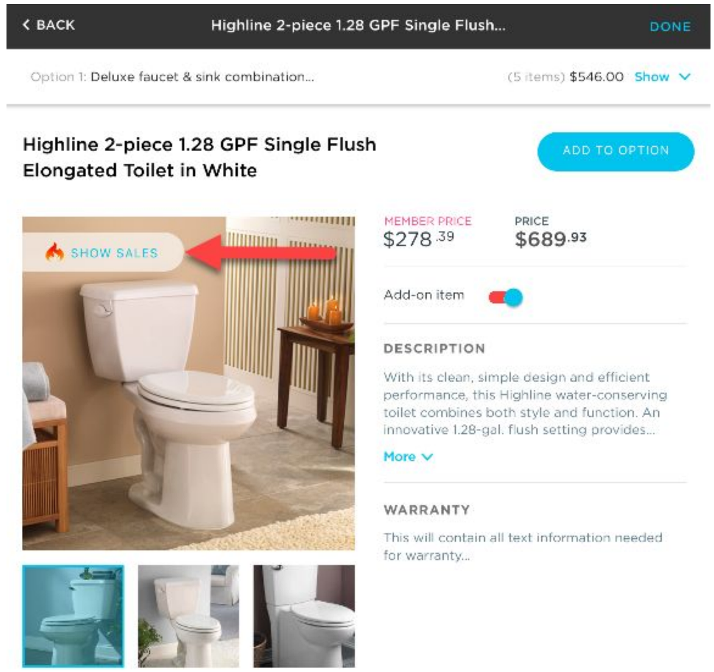
➢ The sales map will only be available if the equipment / service has had 5 or more sales.

How you might use this feature

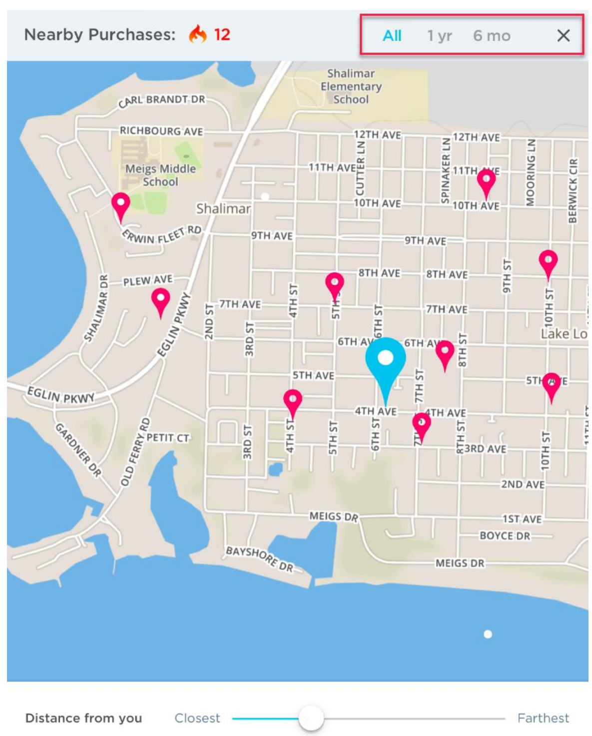
Sales technicians can use the sales map as they present estimates to customers, to show the customer the popularity of any given equipment / service in their area.

Instructions / FAQs

To see the sales map for any service or equipment, tap into the equipment / service from your Pricebook (or, tap into the item from the invoice / estimate). Once you are on the equipment / service screen, tap **Show Sales**.



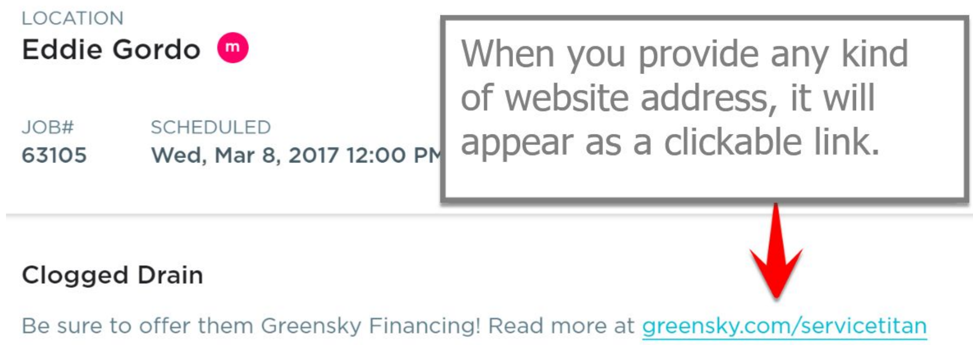
You can adjust the sale map to show all sales, or show sales for the past year or 6 months. To exit the sales map, simply tap the **X** in the upper right corner.



Website addresses will appear as a clickable link

Automatically available

Overview
When you provide a website address in the job summary, it will now appear as an actual link when the technician views it in Mobile.



How you might use this feature

This is a great way to provide your technician easy access to a manufacturer's website, or other kinds of information.

+Add Items button added to invoices and estimates

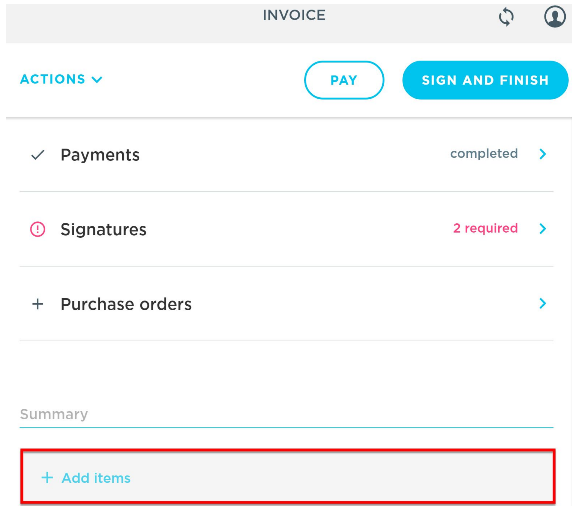
Automatically available

Overview

In ServiceTitan Mobile, there will now be an easy-to-locate button for **+Add Items** on both invoices and estimates.

Previously, **+Add Items** was located in the actions menu. The **+Add Items** button has been created, to make it easier and more intuitive to build estimates and options.

- ➢ Please Note: No functionality has changed.



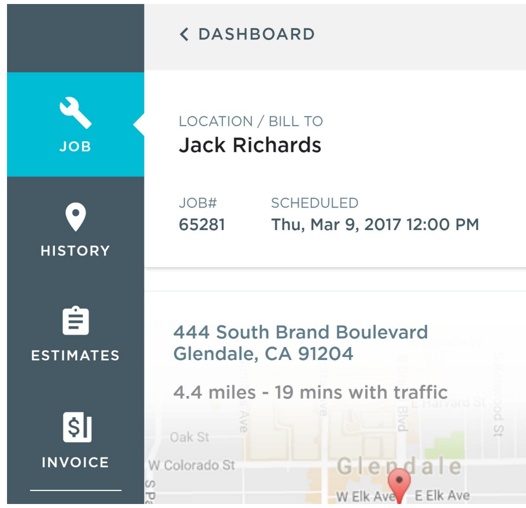
Access **Estimates** and **Invoice** before arrival at the job site

Automatically available

By default, when technicians are scheduled for a job their access to the job menu is limited until they have arrived at the job site.

From now on, technicians will be able to access **Estimates** and the **Invoice** before they have been dispatched to a job. If the technician has been scheduled for a job, and the job is available on the technician's dashboard in Mobile, the technician will have access to **Estimates** and the **Invoice**. This will help technicians get a head start on preparation for the job.

- Technicians will be able to *access* estimates/invoice, or *build estimates*.
- Technicians will *not* be able to present estimates or sell/convert estimates until they have arrived.
- Technicians will *not* be able to build or edit the invoice before they have arrived.



A payment calculator has been added to GreenSky

✷ To sign up for GreenSky, contact your Implementation Specialist or Success Manager

If you already have GreenSky, the payment calculator will be automatically available.

Overview

When you bring up the GreenSky application in ServiceTitan Mobile, the customer will now be able to use a payment calculator (payment estimator) to see what their monthly payment will be.

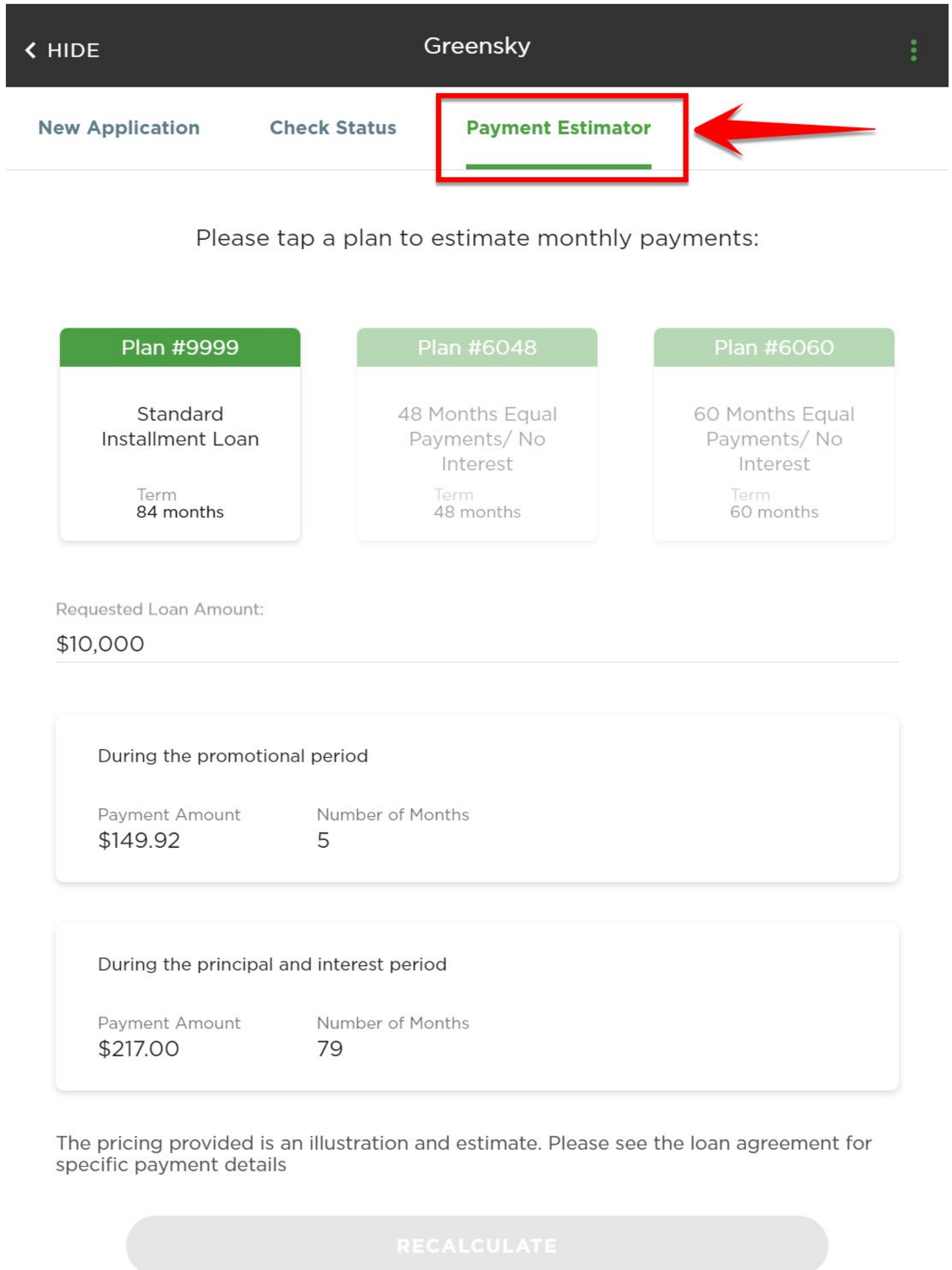
The payment calculator will encourage customers to move forward with the loan process, helping technicians close more deals.

Instructions / FAQs

How do I access the payment calculator?

To access the GreenSky application, tap **Pay** from the invoice. Then tap **Apply for Financing** and select GreenSky.

Once you are on the GreenSky application, you will see a tab called **Payment Estimator**. Tap here to access the payment calculator.



Required Setup

Contact your Implementation Specialist or Success Manager to sign up for GreenSky. If you already have GreenSky, the payment calculator will be automatically available.

When the technician taps **Dispatch**, there will no longer be a pop-up asking to confirm

Automatically available

Overview

Currently, when a technician taps **Dispatch** a pop-up will appear asking **Dispatch Now?**

*There will no longer be a **Dispatch Now?** pop-up*

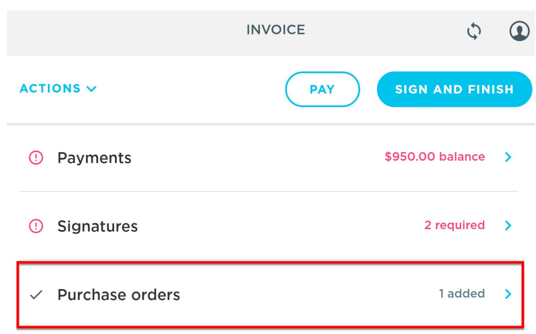
When a technician taps **Dispatch**, the dispatch will happen immediately without the technician needing to confirm. This will reduce the number of steps for technicians.

A section for **Purchase orders** has been added to the invoice

Automatically available

Overview

A section for **Purchase orders** has been added to the invoice screen, right beneath **Signatures**.



The **Purchase orders** section will be on the invoice whether or not POs have been added. This will serve as a reminder to technicians to add POs if any are necessary. If POs have been added, it will display how many.

Instructions / FAQs

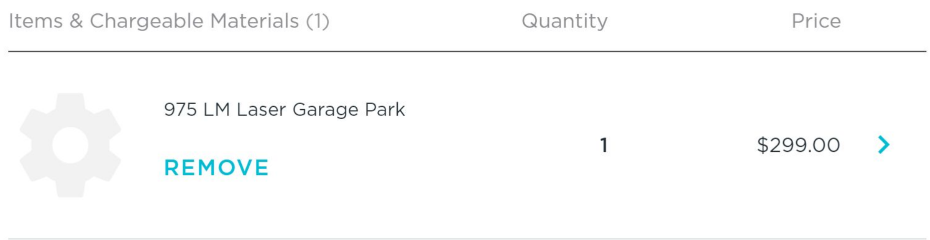
Simply tap the **Purchase orders** section to see purchase orders, or to add a new purchase order to the job.

Overview

Chargeable materials will display on invoices and estimates

Automatically available

If you add a material and tap **Charge for material**, the material will display as a chargeable material on the invoice or estimate.



The technician scorecard will now default to a one month view

Automatically available

Overview

When you open ServiceTitan Mobile, the technician scorecard defaults to *Today*. From now on, the scorecard will default to a date range of one month (*Trailing 30 days*).

When you view projects, instead of a Pay Balance button you will see three blue dots

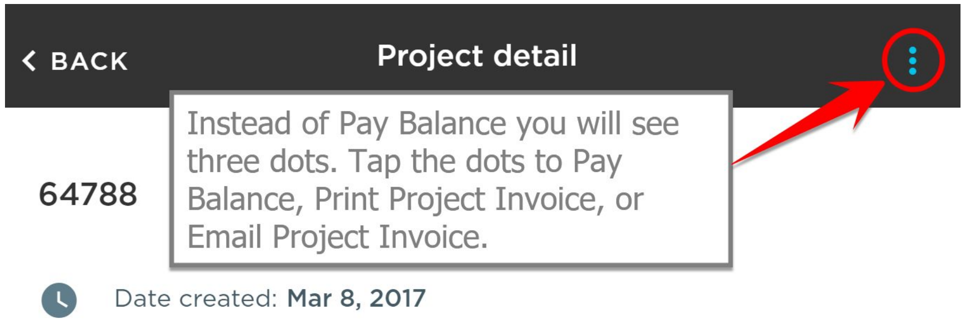
Automatically available

Overview

When you view a project, previously there was a **Pay Balance** button in the top right of the project flyout. From now on, instead of a **Pay Balance** button you will see three blue dots. Tap the dots to:

- ➢ Pay Balance
- ➢ Print Project Invoice
- ➢ Email Project Invoice

To view a project, tap **History**, then tap **Projects** and select the project you want to see.



Credit card fields will no longer display if the business unit is not set up for credit card processing

Automatically available

Overview

This feature applies to technicians who process payments in the field.

If the business unit of the job is not set up for credit card processing, credit card fields will no longer be displayed when you select *Credit Card* as a payment type.

You will see the amount field only, so you can create a record of the charge. However, the credit card fields will not display, making it more apparent to technicians that they are not able to process a charge.

When you sell/convert an estimate, the button will say **Sell** (not **Sign**)

Automatically available

Overview

When you sell/convert an estimate in Mobile, previously the button would say **Sign**. The button will now say **Sell**. You may want to use the Content Portal to inform your technicians of this change, to avoid any unnecessary confusion.

- ➢ Please Note: No functionality has changed.

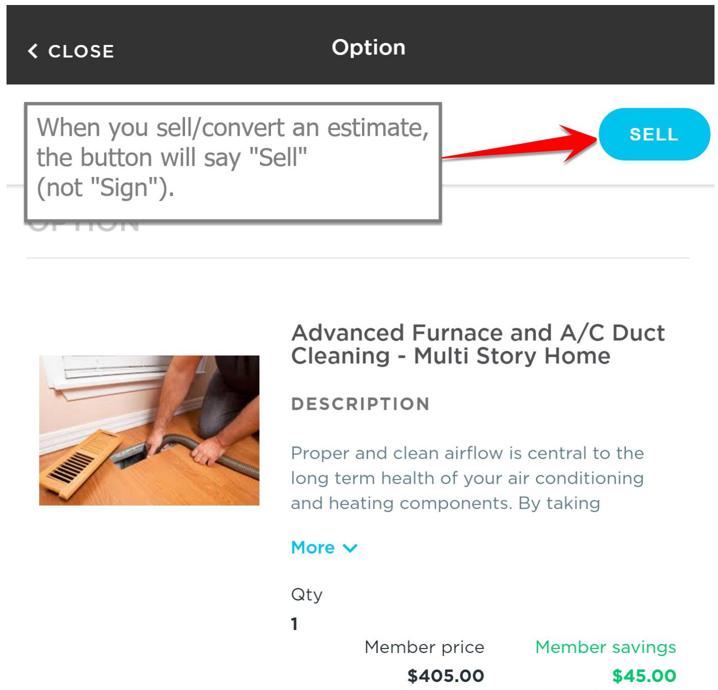
Instructions / FAQs

Why did the name of this button change?

We are always working to make Mobile as streamlined as possible. By changing the name of this button, it will make it more intuitive for technicians to sell estimates.

How do you get to the screen where you sell the estimate?

Tap **Estimates** to create your estimates. Once you're done, tap **Present** to enter presentation mode. Tap **View** on any estimate. This is where you will see the **Sell** button. When you tap **Sell**, you'll be prompted to have the customer sign to authorize the work.



Updates to clock in clock out: Improved view for scheduled events

✷ *Account configuration required*

If your technicians use clock in clock out features in ServiceTitan Mobile, they will notice a couple of small but useful enhancements:

➢ When the technician taps into an event, it will display the event time as well as the date (for example, "2:00PM - 4:00PM, 12/13/16").

➢ If the technician is scheduled for recurring events / appointments, the Mobile dashboard will only show the next upcoming appointment. This prevents the technician's dashboard from getting cluttered.

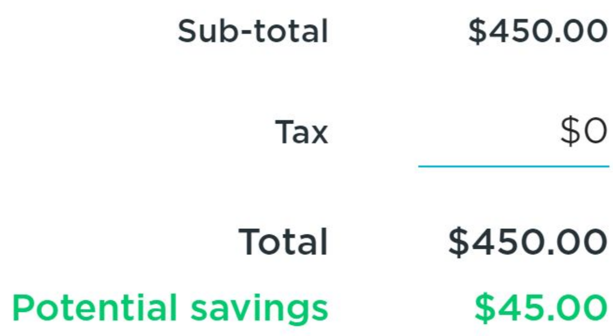
Design Update: Members savings amounts are now bright green

Automatically available

Overview

The color of member savings amounts displayed on invoices and estimates is now bright green.

➢ Please Note: No functionality has changed.



Payroll

Worker's compensation reporting: enter classification codes on job types

✷ *Account configuration required*

ServiceTitan now offers worker's compensation reporting.

Enter the Comp Code (worker's compensation class) on all of your job types

➢ You can enter the worker's compensation job classification code on your job types, with the *Standard Rate*, *Overtime Rate, and DO Rate* (double overtime).

Run the Worker's Compensation Report

➢ The *Worker's Compensation Report* will provide you with the invoice details, a breakdown of hours, and the total calculated pay.

➢ The report will be grouped by the worker's compensation class (*Comp Code*).

➢ The report will also list invoices with *No Comp Code*.

➢ You can filter the report by date range or technician.

5183(1) Comp Code

Invoice	Date	Technician	Job Type	Comp Code	Standard Rate	OT Rate	DT Rate	Standard Hours	OT Hours	DT Hours	Premium
61885	3/6/2017	Adam	No Hot Water	5183(1)	$4.68	$9.54	$12.87	2 h 50 m	0 h 0 m	0 h 0 m	$13.26
Total				5183(1)	$4.68	$9.54	$12.87	2 h 50 m	0 h 0 m	0 h 0 m	$13.26

Required Setup

These features are not enabled by default. Contact your Implementation Specialist or Success Manager to configure your account.

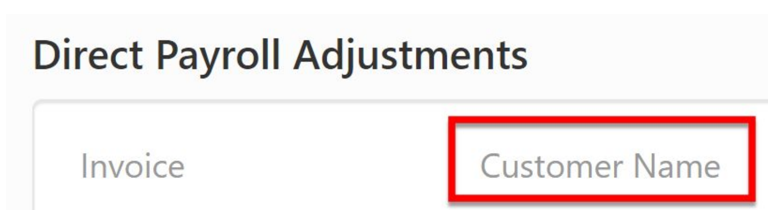
Instructions / FAQs

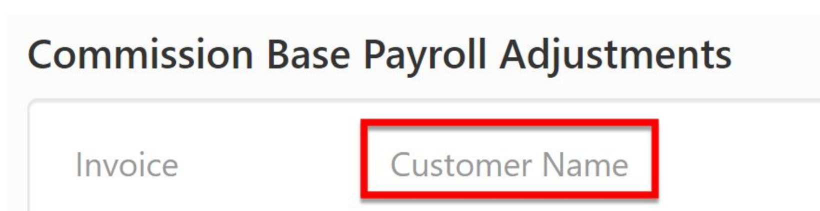
To enter the *Comp Code* and hourly rates, go to Settings > Job Types. To run the *Worker's Compensation Report*, click **Reports** from the top navigation menu.

The bill to customer name will now appear on payroll adjustments (*Payroll Detail Report*)

Automatically available

On the *Payroll (Detail) Report,* you will now see the bill to *Customer Name* for payroll adjustments. If a *Direct* or *Commission* payroll adjustment has been made, and an invoice is associated with the adjustment, the bill to *Customer Name* from the invoice will be displayed.





Ability to enter a technician's union, see the union for a job, and view union payroll

✷ *Account configuration required*

Overview

These features will allow you to keep basic track of union activity in ServiceTitan.

You will be able to:

- ➢ Enter a technician's union (Settings > Technicians > Payroll tab > Union).
- ➢ Enter the union for a job (Navigate to the job > Click the Edit Pencil > Union).
  - The union for the job will be automatically populated, if all technicians are part of the same union.
  - You can always edit or enter the union for any job.

In addition, the following columns will be added to the *Technician Activity Detail Report*:

- ➢ **Union**
  - Union of the job.
- ➢ **Hourly rate**
  - The technician's hourly rate (Settings > Technicians > Payroll tab > Hourly Rate).
- ➢ **Gross Pay**
  - The technician's gross pay. [Hours Worked] x [Hourly Rate].

Required Setup

These features are not enabled by default. Contact your Implementation Specialist or Success Manager to configure your account.

Projects

Single invoice for projects in Mobile 2.0: Configure your account so technicians working on a project will see the project invoice

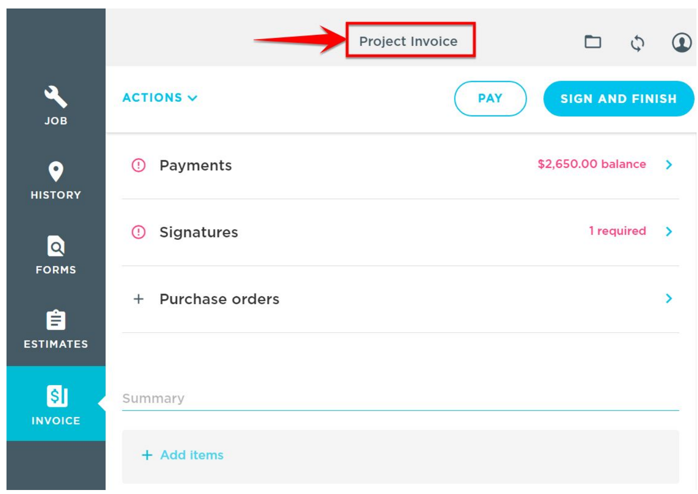
✷ *Account configuration required*

Overview

You can configure your account so there will be a single invoice view for projects in Mobile 2.0. There will still be a separate invoice for each job attached to the project. However, in Mobile 2.0 technicians will see the *Project Invoice* when they tap the **Invoice** button.

When you use a project invoice:

➢ The *Project Invoice* will include invoice items for all jobs attached to the project, as well as all sold estimate items on the project.



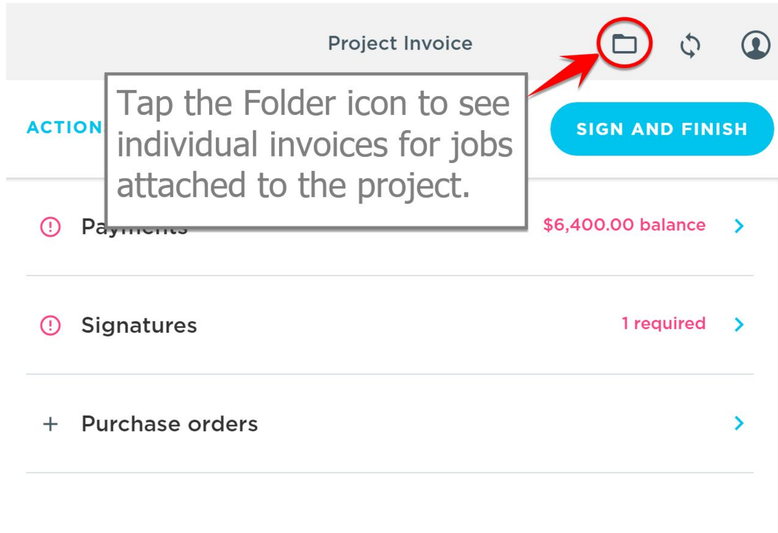
Instructions & FAQs

How do I access the Project invoice in Mobile 2.0?

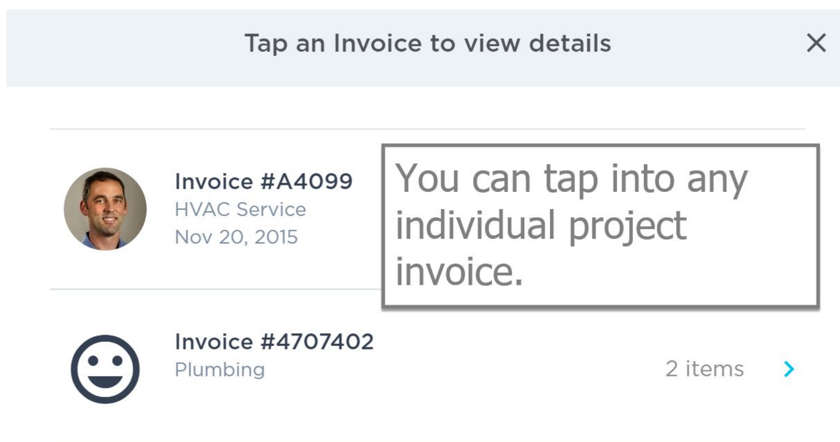
You will see the *Project Invoice* when you tap **Invoice**. If the job is part of a project, you will automatically see the *Project Invoice* (not the job invoice) in Mobile 2.0.

Can you see the individual invoices attached to the project within Mobile 2.0?

Yes. You can tap the **Folder** icon at the top of the *Project Invoice* to see individual invoices for each job attached to the project.



Once you tap the **Folder** icon, you can tap into any individual project invoice.



What if I sell an estimate and work will be completed "Later" (a separate job)?

If you sell an estimate, whether you choose to complete work now or later, the estimate items will appear on the *Project Invoice*.

Required Setup:
These features are not enabled by default. Contact your Implementation Specialist or Success Manager to configure your account.

Create a project on the customer or location record, before a job has been booked

Automatically available

Previously in ServiceTitan, you could only create a project from a job that's already been scheduled.

Now you can create a project before booking a job. This allows you to set up a project in advance, and then add jobs to the project as the work is scheduled.

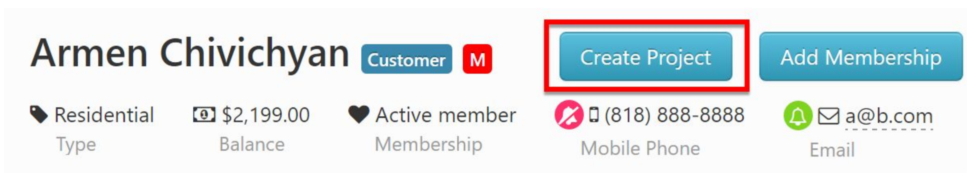
Simply navigate to any customer or location record to create a new project.

Instructions / FAQs

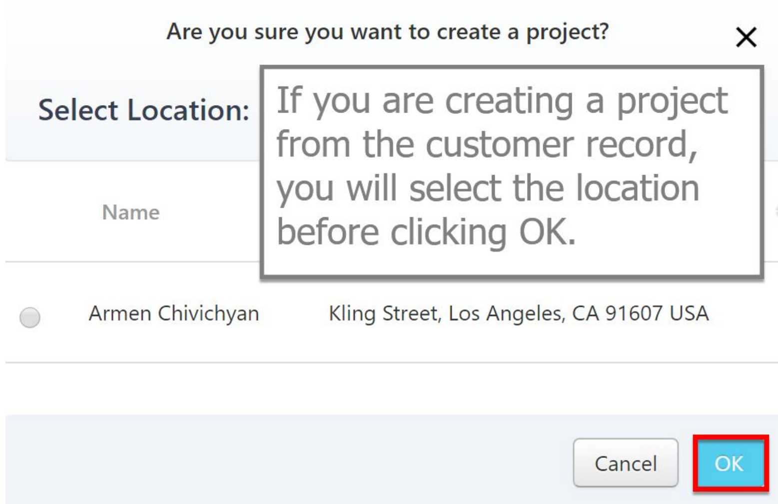
How do you create a new project before booking a job?

1. Navigate to the customer or location (Search > Customer or Search > Location).

2. Click **Create Project**, located at the top of the screen.



3. A pop-up will appear asking you if you want to create a project. Click **OK**.
    a. Note: If you are creating the project from the customer record, you'll need to select the location before clicking **OK**.

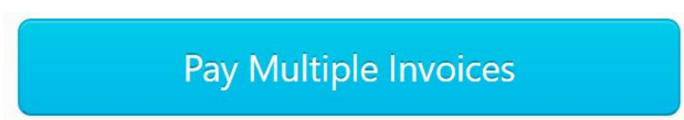


4. As soon as the project is created, you will be taken to the project screen. You can use the project screen to book a new job (the job will automatically be attached to the project), or attach an existing job to the project.

Add a payment to multiple invoices through the project screen

Automatically available

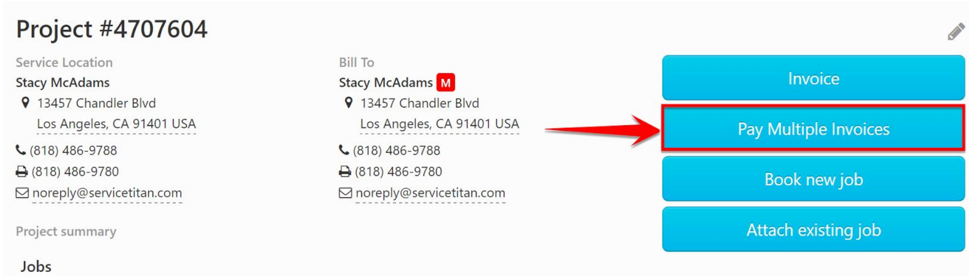
A **Pay Multiple Invoices** button has been added to the project screen. This will allow you to add a payment across multiple project invoices. As you add the payment, you can choose the amount to be applied to each invoice.



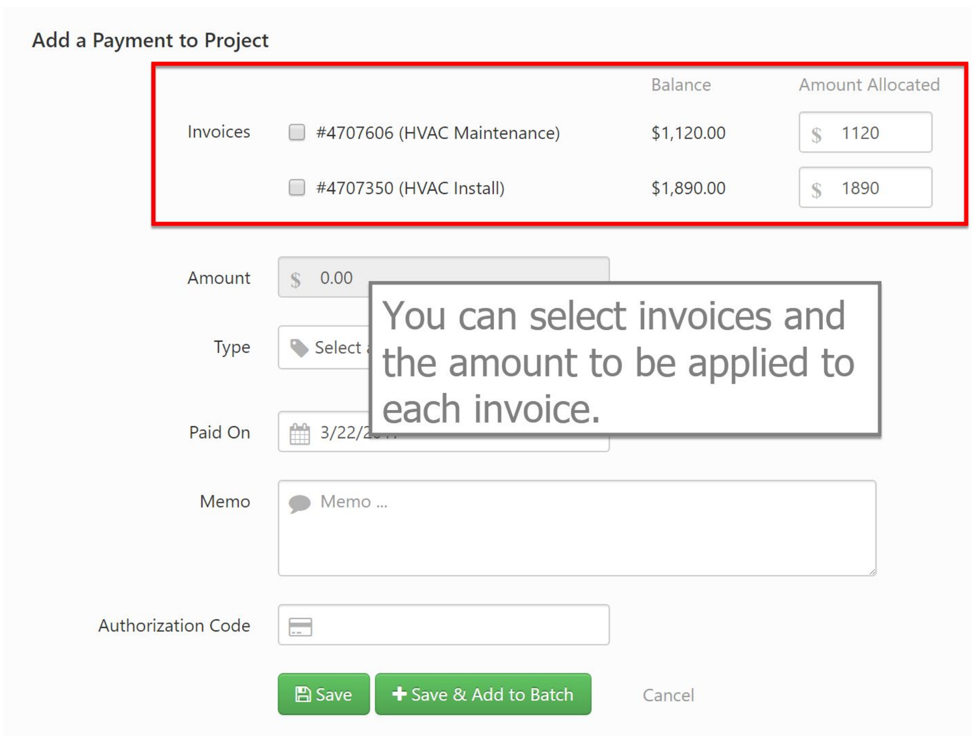
Instructions / FAQs

To apply payment to project invoices:

1. Navigate to the project (Search > Project).
2. Click **Pay Multiple Invoices**.



3. Select the invoices where you would like to apply the payment. Then, enter the amount to be applied to each invoice (the amount will default to the full balance, but you can enter a different amount if desired).



4. Continue entering the payment information.

5. When you are done, click **Save.** If you want to batch the payment immediately, click **Save & Add to Batch**.

Columns added to Projects search export: Use the export to see a detailed breakdown of all your projects

Automatically available

Overview

ServiceTitan gives you the ability to search projects (Search > Project) and download your search results in Excel (.xlsx) or .CSV format.

The *Projects* export is a powerful reporting resource that will give you a detailed breakdown of all your projects.

L	M	N	O	P	Q
Job Status	**Invoice Number**	**Sku Total**	**Invoice Total**	**Balance**	**Payments**
Scheduled	16553	0.00	0.00	0.00	

Instructions / FAQs

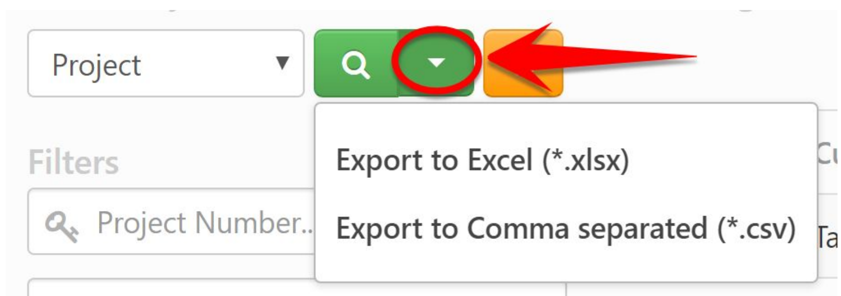
The following columns have been added to the *Projects* search export:

- **Job Number**
- **Job Status**
    - *Scheduled, In Progress, Complete*
- **Invoice**
    - Invoice number for the job.
- **SKU Total**
    - Sum of services on the invoice (not the invoice total).
    - The SKU total will help you compare Pricebook prices with the total amount charged by the technician.
- **Invoice Total**
- **Balance**
    - Unpaid balance on the invoice.
- **Payments**
    - Payments made by the customer, separated by commas.
- **Paid On**
    - *Paid On* date of all payments, separated by commas.
- **Estimate Sold On**
    - *Sold On* date for any estimates sold on the opportunity, separated by commas.
- **Estimate Total**
    - Totals of sold estimates, separated by commas.
- **Lead Tech**
    - If this was a tech generated lead, name of the tech credited for the lead (*Lead Generated By*).

- **Sold By**
  - Name of the technician credited with selling the job (*Sold By*).
- **Install Tech(s)**
  - Names of all technicians with splits on the job.
- **Tags**
  - All tags on the job, separated by commas.

How do I search Projects and export the data?

1. Go to Search > Projects.
2. Enter the desired search criteria, then click the green **Search** icon.
3. Once you see your search results, click the **Dropdown Arrow** next to the search field.
4. Select *Export to Excel* or *Export to Comma separated* as desired.
5. You will be able to retrieve the export file in your downloads.



Reports

The *Technician Activity Detail* export will now display data in hours (including decimal for minutes), not 00h 00m

Automatically available

Overview

When you export the *Technician Activity Detail Report* to Excel, you will notice that data is no longer displayed in hours and minutes.

From now on, data will be displayed in hours. If there are minutes, it will be displayed in decimals (for example, instead of “00h 34m”, you will see “0.57”).

H	I	J
Duration	**Hours Worked**	**Regular Time**
0.57	0.57	0.57

This will make it easier to run calculations off the exported report.

- Note: This change applies to the export only. When you view the report in ServiceTitan, data will still display as 00h 00m.

Improvements to *Dispatch Performance Report*

Automatically available

Overview

The *Dispatch Performance Report* gives you a detailed breakdown of dispatcher activity within any given date range. Several improvements have been made to the *Dispatch Performance Report*.

- The report is now called the *Dispatcher Performance Report*.

Instructions / FAQs

The following columns have been added to the report:

- **Job average**
  - Equal to *Total Job Avg* on the dashboard.
- **Conversion rate**
  - Dispatcher conversion rate. [Sold jobs] / [Convertible Jobs].
- **Sold estimates ($)**
  - Revenue generated from estimates. [Sum of estimate totals].
- **Sold estimates (#)**
  - Number of estimates sold by the employee. [Number of estimates with the employee credited with the *Sold by*].
- **Sold estimates average**
  - Average amount of sold estimates.
- **Leads (#)**
  - Number of jobs dispatched. Note: This does <u>not</u> include technicians who did a self-dispatch.
- **Leads ($)**
  - Revenue generated by the dispatcher's leads. [Invoice subtotals for dispatched leads].
- **Lead sales**
  - Number of jobs assigned by the dispatcher that resulted in a lead with a sold estimate.
- **Lead conversion rate**

- The dispatcher's conversion rate. [Lead sales] / [Number of leads dispatched].

➢ **Recalls**
- Number of dispatched jobs that resulted in a recall.

➢ **Recall %**
- Percentage of dispatched jobs that resulted in a recall. [Recalls] / [Number of jobs dispatched].

Instructions / FAQs

How do I run/schedule the Dispatcher Performance Report?

Click **Reports** from the top navigation menu and search for *Dispatcher Performance*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

New Report: *Failed Transaction Report*

Automatically available

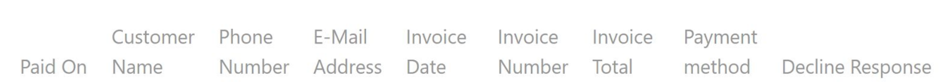
Overview

The *Failed Transaction Report* provides a list of all failed transactions, including declined credit card and declined ACH / bank transfer transactions. You can run the report by *Batch Number*, *Business Unit*, or date range.

Instructions / FAQs

What's included in the report?

The report includes the following columns:



➢ **Paid On**
- Date the transaction was attempted.

➢ **Customer Name**
- Bill to customer on the invoice.

➢ **Phone Number**
- Bill to customer phone.

- **Email Address**
  - Bill to customer email.
- **Invoice Date**
- **Invoice Number**
- **Invoice Total**
- **Payment method**
  - *Credit card, ACH, etc.*
- **Decline Response**
  - Decline response from the processor.

How do I run/schedule the Failed Transaction Report?

Click **Reports** from the top navigation and search for *Failed Transaction*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

Documentation Links

- ServiceTitan Payments - Overview

State and *Zip* of the location address will now appear on the *Job Completed Detail Report*

Automatically available

Overview

The *Job Completed Detail Report* provides a breakdown of technician invoices by job completed date.

The *State* and *Zip* of the location address have been added to the report.

Instructions / FAQs

How do I run/schedule the Job Completed Detail Report?

Click **Reports** from the top navigation and search for *Job Completed*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

Leads added to *Web Booking Summary Report*

Automatically available

Overview

The *Web Booking Summary Report* provides you with a detailed list of your online appointment requests, including any appointments coming in through your integrations (such as HomeAdvisor). The report shows you which online appointment requests are generating revenue.

A *Leads* column has been added to the report. *Leads* will tell you the total number of appointment requests that came in through the booking source.

Instructions / FAQs

How do I run/schedule the Web Booking Summary Report?

Click **Reports** from the top navigation and search for *Web Booking*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

Customer email added to *Survey Report*

Automatically available

Overview

The *Survey Report* provides you with a breakdown of all completed customer surveys, including the rating for each job.

The customer's bill to email address has been added to the report. This will make it easier to use the report to follow up on surveys as necessary.

Instructions / FAQs

How do I run/schedule the Survey Report?

Click **Reports** from the top navigation and search for *Survey Report*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

Documentation Links

- Guide to customer surveys

Job type and *Campaign* added to *Canceled Calls Report*

Automatically available

Overview

The *Canceled Calls Report* provides you with a detailed breakdown of all your canceled calls.

The following columns have been added to this report:

- *Job type*
- *Campaign*

Campaign	Job Type
Radio LTI	Fixture Install

This will allow you to sort the report by job type or campaign, and perform follow up on canceled calls.

Instructions / FAQs

How do I run/schedule the Canceled Calls Report?

Click **Reports** from the top navigation and search for *Canceled Calls*. Click **Schedule** to schedule the report. Or, click on the name of the report to run the report or download it.

Search

Ability to access the payment batch from the **Search** screen

Overview

When you search payments on the **Search** screen (Search > Payments), the batch number will now be listed in the search

Automatically available

results. You will see the batch number to the right of the authorization code (*Auth Code*).

Business Unit Invoice #	Paid On Amount	Type Status	Auth. Code Memo	Batch
Main 67383	3/15/2017 $0.00	Credit Card Pending		222

- ➢ When you click on a batch number, this will take you directly to the batch.
- ➢ When you export search results to Excel, you will also see a column for batch number.

Search customers by *Member Status*

Automatically available

Overview

When you search customers (Search > Customer), you will now have the option to filter the search by *Member Status*.

The *Member Status* filter will have two options:

- ➢ Active
- ➢ Inactive

Search invoices by *Invoice Status*

Automatically available

Overview

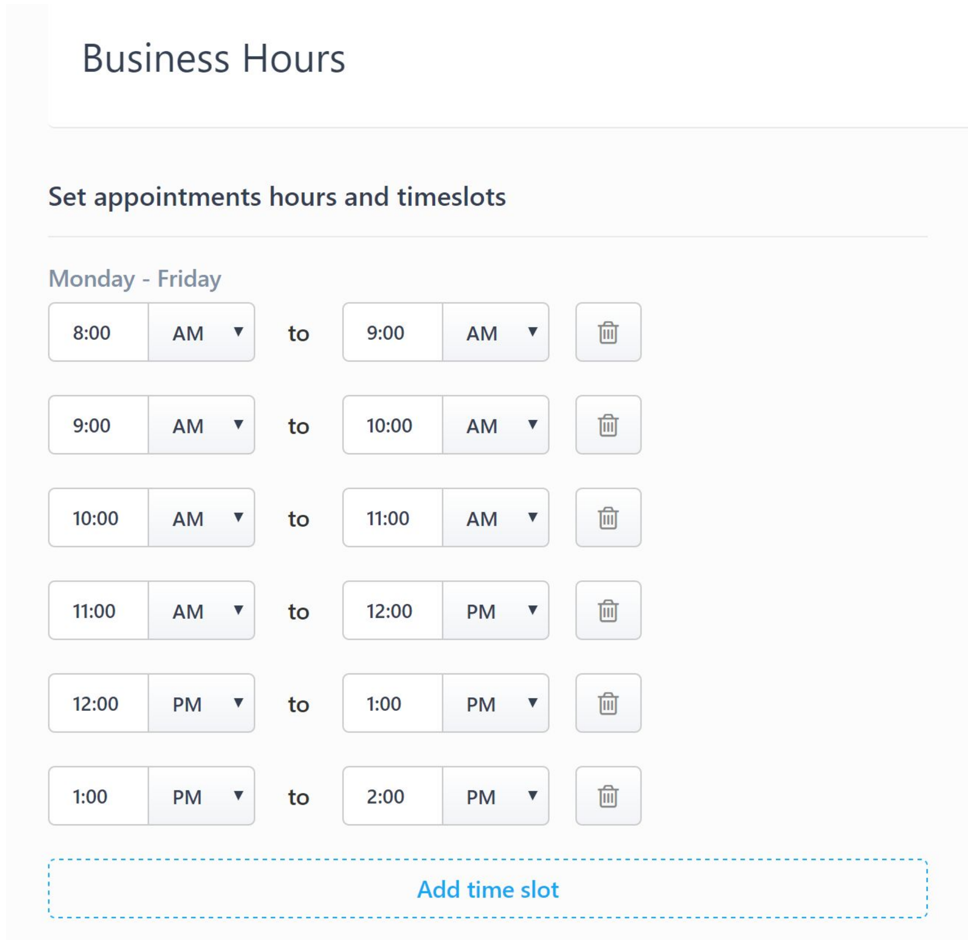
When you search invoices (Search > Invoice), you will now have the option to filter the search by *Invoice Status*.

The *Invoice Status* filter will have the following options (you may filter by multiple):

➢ Select all
➢ Pending
➢ Posted
➢ Exported

Settings (Business Hours)

Design update to the *Business Hours* table *Automatically available*	**Overview** When you navigate to Settings > Business Hours, you will notice a more modern, updated design. The new design has a dropdown to set AM/PM, making it easier for you to enter your business hour time slots. ➢ If you have already set up your business hours, your business hour time slots will automatically appear in the new template. No action is required. ➢ No functionality has changed. You can edit business hour time slots just as you would before.



New customers will no longer be provided with default business hours

Please be aware that if you are a new customer, or if you have not set up your business hours, default business hours will no longer be provided. Your business hours table will be blank until you set up your business hours in Settings > Business Hours.

If you use any of the following features, business hours must be set up:

- ➢ Technician capacity planning (Account configuration required).
- ➢ Appointment reminders (Settings > Communication Settings).
- ➢ Booking confirmations (Settings > Communication Settings).

➢ Web scheduler (Settings > Web Appointments).

➢ HomeAdvisor booking requests (Account configuration required).

➢ Any features that utilize the business hours table.

Documentation Links:

- [Setting up business hours]()

Settings (Job Types)

Ability to set a job type as a *No Charge* job

Automatically available

Overview

You now have the ability to set any job type as a *No Charge* job (Settings > Job Types).

Any job booked with that job type will be automatically set as a *No Charge* job.

You can use this feature for:

➢ Sales opportunities (when a technician is dispatched to provide an estimate only)

➢ Any type of no charge job (jobs that should not be considered as convertible)

Instructions / FAQs

To set a job type as no charge:

1. Navigate to Settings > Job Types.
2. Click **Add job type**, or click to edit an existing job type.
3. Check **No Charge/Unconvertible by default.**

4. Click **Save**.

Settings (Permissions)

New permission to control which technicians can self-dispatch

Automatically available

Overview

A new technician permission has been created which allows you to control which technicians can self-dispatch in Mobile 2.0. The permission is called *Mobile Self Dispatching*.

➢ This permission will be on by default for all technicians.

Instructions / FAQs

To turn permissions on or off for individual technicians, go to Settings > Technicians > Permissions tab. To turn permissions on or off for an entire technician role, go to Settings > Permissions.

Documentation Links:

- [Guide to ServiceTitan Permissions]

We hope you enjoy these new features!

Feel free to contact your Implementation Specialist or Success Manager should you have any questions.