

# Commercial Playbook

Produced by: ServiceTitan Customers and internal Industry Experts

Updated on: 6/1/2021

Welcome to ServiceTitan's Commercial Playbook—an aggregation of best practices from across the industry, written purposely for your Commercial business. After reading this playbook, you'll learn all the key tips and tricks (what we call "best practices") needed to take your business to the next level.

This playbook assembles the wisdom of some of the most successful companies that utilize ServiceTitan. It allows our customers to share their ideas and provide insight into the methods that have allowed them to become more profitable and achieve fantastic growth rates.

While not every principle covered in this book applies directly to all contracting markets, industries, or businesses, we aim to provide insights that help the industry grow as a whole.

This Commercial Playbook focuses on contracting businesses with more than 30% of their revenue in the Commercial Service & Replacement industry. Though geared toward Commercial, many of these tips apply much more broadly to other trades and other businesses.

We intentionally focused the playbook on the **best business practices**, independent of ServiceTitan. But we also note ways for you and your team to leverage ServiceTitan to either enable these best practices or take them to the next level.

If you have insights to share—and potentially be added to this playbook—please fill out this [Idea Submission Form](#).

# Table of Contents

|                                                                        |           |
|------------------------------------------------------------------------|-----------|
| <b>Table of Contents</b>                                               | <b>2</b>  |
| <b>Introduction - What is Commercial?</b>                              | <b>4</b>  |
| <b>Services &amp; Departments</b>                                      | <b>4</b>  |
| Departmentalization, Business Units, & Job Types                       | 4         |
| Single-Trade Businesses                                                | 4         |
| Multi-Trade Businesses                                                 | 5         |
| Job Types                                                              | 6         |
| Business Unit Best Practices                                           | 7         |
| Restrict Job Types to certain business units                           | 7         |
| Things to Know                                                         | 7         |
| <b>Marketing Commercial &amp; Defining Your Ideal Customer Profile</b> | <b>8</b>  |
| Plan & Prepare                                                         | 8         |
| Pick                                                                   | 9         |
| Perform                                                                | 9         |
| <b>Forms</b>                                                           | <b>10</b> |
| Best Practice Forms for Commercial Businesses                          | 10        |
| <b>Staffing</b>                                                        | <b>12</b> |
| <b>Work Orders</b>                                                     | <b>13</b> |
| <b>Invoicing Workflow</b>                                              | <b>14</b> |
| <b>Reports</b>                                                         | <b>15</b> |
| Most Impactful Reports                                                 | 15        |
| Automating and Scheduling Reports                                      | 15        |
| Best Practice Reports by Role                                          | 16        |
| Owner                                                                  | 16        |
| GMs                                                                    | 17        |
| Accountants                                                            | 17        |
| Office Managers                                                        | 18        |
| Payroll                                                                | 18        |
| Job Costing                                                            | 18        |
| Inventory/Purchasing                                                   | 19        |
| <b>Alerts</b>                                                          | <b>20</b> |
| Setting Alerts within your company                                     | 20        |
| Use alerts to monitor activity                                         | 20        |
| <b>Commercial Membership Types</b>                                     | <b>23</b> |
| Membership Types                                                       | 23        |
| To sell/add the commercial contract                                    | 23        |

|                                           |           |
|-------------------------------------------|-----------|
| <b>Recurring Service Types</b>            | <b>23</b> |
| <b>Custom Fields</b>                      | <b>24</b> |
| Customer PO#                              | 24        |
| Location Type                             | 25        |
| NTE (Not To Exceed)                       | 25        |
| Permits Tracking                          | 25        |
| <b>Job Types</b>                          | <b>25</b> |
| Sold Thresholds                           | 25        |
| Non-Opportunity Jobs                      | 26        |
| <b>Skills</b>                             | <b>26</b> |
| <b>Tagging and Tracking Jobs</b>          | <b>28</b> |
| <b>Workflow</b>                           | <b>30</b> |
| <b>Billing</b>                            | <b>30</b> |
| Billing Change                            | 30        |
| Customer Credits                          | 31        |
| Setup                                     | 31        |
| Process (Once payment is received)        | 31        |
| <b>Customer Portal</b>                    | <b>32</b> |
| <b>Content Portal</b>                     | <b>34</b> |
| <b>Project Tracking</b>                   | <b>34</b> |
| <b>Task Management</b>                    | <b>35</b> |
| <b>Commercial-Specific Features</b>       | <b>36</b> |
| Customer Specific Pricing                 | 36        |
| Project Tracking Suite                    | 36        |
| Multiple Invoice / Estimate Print Options | 37        |
| <b>Time &amp; Materials Pricing</b>       | <b>37</b> |
| <b>Customer Notifications</b>             | <b>38</b> |
| <b>Change Orders</b>                      | <b>38</b> |
| <b>That's all!</b>                        | <b>39</b> |

# Introduction – What is Commercial?

Search Wikipedia for “What is a Commercial Property?” By the wiki definition, “Commercial property includes office buildings, medical centers, hotels, malls, retail stores, multifamily housing buildings, farm land, warehouses, and garages.” Seems pretty straightforward but the real world, especially within the Trades, has nuances.

Ultimately, the most important definition is the one your business uses to draw a clear distinction across your multiple business segments. That allows your team to operate efficiently and provide an amazing experience for every customer, whether you consider them “Commercial” or “Residential.”

The decision should be driven primarily by the ways in which you interact with your customers. Commercial customers should:

- Behave relatively similarly
- Be dealt with using relatively standard workflows
- Be obtained and retained in similar ways.

At ServiceTitan, we learn from thousands of customers who use our product. We’ve found that these are the kinds of properties they define as commercial: Any residence above a 4-plex; standalone businesses, plus those in malls and strip malls; restaurants; schools; government facilities; non-profits; and any business dealing with a facility maintenance company.

Still unsure of where to draw the line? Start with what you know, beyond any doubt, is residential. If this line is clearly defined, your team will be less confused about how to handle specific customers.

## Services & Departments

Regardless of how you classify your company’s customer focus, you must clearly delineate the business internally in a way that maximizes revenue, decreases costs, and provides the best customer experience. ServiceTitan provides this functionality via what we call “Business Units,” really just an internal division or department within your company.

For this Playbook, we’ll call this process “departmentalization.”

## Departmentalization, Business Units, & Job Types

### Single-Trade Businesses

Whether your business is predominantly Commercial or Residential, departmentalizing your financial statements is **an absolute must**. In ServiceTitan, this is easily accomplished by using Business Units (BUs), a key piece of our functionality that unlocks insights and reporting capability. Business Units are used to track performance at a

granular level, in this case a department, such as “HVAC Maintenance—Commercial” or “HVAC Install—Commercial.”

We recommend creating a Business Unit for **each** Department. Even if your company is a single-trade business, Departments help bring clarity to the business, enabling you to effectively drive performance on the revenue and cost side.

For instance, an HVAC-only company using ServiceTitan would typically have 4 departments:

- **Sales**, for your Comfort Advisors / Salespeople
- **Install**, for the installation of new units
- **Maintenance**, for annual maintenance visits or preventative maintenance work
- **Service**, for diagnostics, repairs, troubleshooting, etc.

## Multi-Trade Businesses

If your business is multi-trade, we **strongly recommend** creating a Business Unit for **each department** within **each trade**. For example, a company that does Residential HVAC and Plumbing, with a Commercial HVAC department would use the the following Business Units:

- **Residential HVAC Business Units:** HVAC Sales Residential, HVAC Install Residential, HVAC Maintenance Residential, HVAC Service Residential
- **Residential Plumbing Business Units:** Plumbing Sales Residential, Plumbing Install Residential, Plumbing Drains Residential, Plumbing Service Residential
- **Commercial HVAC Business Units:** HVAC Sales Commercial, HVAC Install Commercial, HVAC Maintenance Commercial, HVAC Service Commercial

Given the interconnected nature of ServiceTitan with your chosen accounting software (we recommend QuickBooks), it's crucial that these BUs match what you're using in your accounting software for true end-to-end visibility.

In QuickBooks, Business Units are called classes. Invoices should be properly exported to the corresponding classes in QuickBooks so you can get accurate, departmentalized reporting. This provides you with the ability to run a Profit and Loss statement per department, which can improve the quality of decision-making in your business.

If your business is losing money in a particular month or quarter, you should be able to open up your financial statements and **quickly find the departments that are underperforming**. With this level of insight, you can focus on fixing the underperforming department(s), instead of spending that time trying to find the problem.

Furthermore, you can juice the parts of the business that are working well, while you iron out the kinks in the underperforming department(s).

ServiceTitan allows you to see these trends on a daily, weekly, monthly, quarterly, and annual basis.

When you log in, your landing page is a dashboard giving you a snapshot of how your business is doing. Think of it as your “go-to hub.” You can also schedule reports to come to your email every day or deep dive into ongoing jobs with job costing. **Having this powerful tool allows you to correct your course quickly and keep jobs on track.**

As a rule of thumb: when a portion of your business is or will become **greater than 10% of your company's overall revenue**, it's a good idea to departmentalize and make this its own Business Unit.

We don't recommend separating services such as "Heating Calls" and "Cooling Calls" into their own BUs. This isn't typically required at the Business Unit level because you can still get reporting that divides calls by service provided, using ServiceTitan's Job Type functionality—essentially sub-categories within each BU.

## Job Types

Business Units and Job Types are **the two most important drivers of reporting within ServiceTitan**. They are the keys to unlocking that next level of insights that only ServiceTitan can provide your business.

Spend time to configure these appropriately up front. The way BUs and Job Types are set up within ServiceTitan for your business will have **major** downstream effects on your ability to track KPIs and business performance (and therefore your ability to take action within the business).

Here are some examples of common Job Types for a Commercial HVAC Business Unit that does Install (BU: "HVAC Install Commercial"):

- No Cooling
- Chiller Diagnostic
- Packaged Unit Repair
- Coil Cleaning
- RTU Diagnostic/Troubleshooting
- Not maintain temperature
- Compressor Repair
- Leak Locate

So what do Business Units and Job Types look like in action? When an existing customer of yours calls in a panic in the middle of the summer because their AC has stopped blowing cold air throughout their restaurant, one of your CSRs may quickly select the HVAC Service Commercial business unit and within that, book the job type as "No Cooling." **You can now use this granular level of information to find and dispatch the right technician with the right level of urgency based on the customer who called in and the issue they are experiencing.**

ServiceTitan mandates that both Business Units and Job Types be chosen at the time of booking a call, enabling the level of insights and actions you will need to take your business to the next level. This information becomes critical because it affects not only your reporting, but also **so many other operational parts of the business**.

For instance, ServiceTitan tracks the time a technician spends on a job. Since ServiceTitan knows the Business Unit of the call, it can automatically attribute the time charged for the job to that BU. This saves countless hours that would be needed to reconcile time spent on each job as an input into overall job profitability.

ServiceTitan Pro tip: A single Job Type can work with multiple business units. For instance, you may have a Job Type called "Warranty," which could be selected under either Plumbing Service Residential, HVAC Service Commercial or a number of other Business Units.

Job Types also reduce the number of overall Business Units to track. Ultimately, companies can run reports to gain insights from all over the business using BUs and Job Types.

### **Why does departmentalization matter?**

For businesses in the trades, departmentalization is critical to the growth and sustained management of the company, specifically when you start hiring individual department managers.

For instance, if you are a plumbing contractor with an install department that focuses on sewer line replacements and the installation of water heaters, you may want to hire a specific install manager for this department. Incentivizing that manager based on the metrics and outcomes they can control (either partially or entirely **will drive accountability AND ensure that your manager is focused on the outcomes that you value most as a business owner.**

In the case of a plumbing manager, that metric would likely be the gross margin of the plumbing department. For a sales department, a sales manager may be incentivized by the close rate and average ticket of the department. ServiceTitan, with Business Units and Job Types set up properly, provides the easiest way to report these numbers, set goals against them, and hold your team accountable to those goals.

And, when BUs and Job Types are set up properly, getting to those numbers is a pretty simple task. The process is the same for starting a commercial business from scratch or augmenting your current residential business with commercial work.

### **A commercial case study**

Vanessa Gonzales, Co-Owner and Co-Founder at Albuquerque Plumbing, Heating & Cooling Inc, learned some lessons when adding commercial units to the business.

At first, they tried mirroring the residential side as much as possible. That didn't work.

"Ultimately, we realized our commercial customers had different needs than our residential customers," she said.

That led to new Business Units, such as Fire Protection, Kitchen Equipment and, later, Low Temp Refrigeration.

"Once we had our new Business Units established, managers who could build their departments from the ground up, setting appropriate goals for key metrics that mattered most to their division, their Business Units, and their job types and ultimately driving the business to that next level."

She also separated the dispatchers for the residential and commercial divisions, after realizing that commercial customers required much more in-office action compared to the residential business. In residential, field technicians performed some key job-related tasks, such as creating estimates, taking pictures or videos, creating site maps and locating parts/equipment.

Albuquerque Plumbing, Heating & Cooling has been using ServiceTitan to run their commercial business for four years.

The first year we saw a 33% increase in revenue to our 2 core commercial departments,” Gonzales said. “In 2018, those departments brought in \$2.98 million. In 2019, the same departments brought in \$3.95 million.

“I truly believe the main reason this was possible is the level of insights and actions from our reporting, powered by ServiceTitan,” she said.

## Business Unit Best Practices

### Restrict Job Types to certain Business Units

As we mentioned above, you can assign Job Types to multiple Business Units, which helps cut down redundancy of Job Types and provides unique cuts of reporting for your business.

In your Job Type settings, you should assign Job Types **only to the Business Units that apply to the job type** (e.g. set all install Job Types only to your Install Business Units). This will help prevent CSRs from booking jobs under the incorrect business unit (e.g. booking an Estimate Job under a Service Business Unit).

### Things to Know

Your BU settings are also used to **automate tasks and streamline workflows, allowing you to use ServiceTitan to eliminate as many manual steps as possible.**

For example, if your installation BU uses a different authorization agreement from your maintenance BU, you can upload separate agreements for each BU so that your technicians always use the correct one. This simple action saves countless hours correcting errors in the back office and makes your technicians quicker and more efficient in the field.

If you want to take your knowledge of Business Units to the next level, review these Knowledge Base articles on how to properly set up and use Business Units in ServiceTitan:

[Add and Edit Business Units](#)

[Use Business Unit Categories](#) (particularly helpful when running reports on multiple Business Units that are part of the same trade or division.)

[Map Business Units to the Dashboard](#)

[Using Classes in Quickbooks Online](#)

[Using Classes in Quickbooks Desktop](#)

## Marketing Commercial & Defining Your Ideal Customer Profile

Marketing your Commercial business is completely different from marketing your Residential business (if you have one). More likely than not, your Commercial business is going to be generated via word-of-mouth, referrals, relationship-based marketing, or your ability to turn someone else’s misfortune (such as a demand call from someone unhappy with their current contractor) into a long-time customer through a top-notch experience.

Ultimately, when marketing your Commercial business, you’ll need to focus on the best way to plan, prepare, pick

and perform, to acquire and retain customers sustainably.

## Plan & Prepare

- **When** do you want to target new customers?
  - Are you planning for a shoulder season? If yes, you will need to start marketing to these new customers about 3 to 6 months in advance. This can take the form of emails, commercials, billboards, Facebook ads, etc.
- **Where** are these new customers?
  - Are they in your existing customer base? If yes, Awesome! You can start a targeted email or mailing campaign and link the webpage featuring your commercial services. Or send an email announcement introducing your new commercial department, like one ServiceTitan customer did:
    - “When we added our electrical department, we sent an email blast announcing the addition. ServiceTitan has made this **so much easier for us**. We now use [MarketingPro](#) to send out an email after a customer receives service, thanking them for their business and reminding them of the other services we offer. If it’s an HVAC-R customer, the email would highlight our plumbing, drains and electrical services. This is the surest way to drum up new business from existing customers.”
  - Are they companies you already do business with (e.g. your office supplies vendor)?
    - If yes, this part should be easy. Keep doing business with them and ask what you can do to earn their business. This is the revenue circle. Revenue spent at your customers’ business comes back when they use your services, too.
    - If not, evaluate why you have not done business with them yet. If their company values align with yours, start the first revolution of the revenue circle. Make sure you bring pens, business cards or magnets which can be left behind. **Remember to be the customer you would want them to be.**
  - Are there geographical locations you would like to add?
    - Zip or Tax codes
    - Counties
    - States
  - Are new customers available through third-party facilitator groups? If yes, make sure you are aware of the group’s requirements BEFORE approaching them. Most large groups have the requirements listed on their website.
    - SMS, PVC, DirectSupply, and National Hot Water are just a few examples of facility groups some ServiceTitan contractors are able to service.

## Pick

- Pick your ICP (Ideal Customer Profile). Answering the questions above can guide you. Some questions ServiceTitan customers ask:
  - Are they a local business?
  - How much money do they bring in annually?
  - Are they a non-profit?
  - Is this customer a retail location or are they a strip mall?
  - What about restaurants?
  - Will you work with government entities or the local municipalities.?

Once you know what your commercial customer looks like, you can effectively market to them.

- Think of ways to keep the revenue circle moving by becoming your customer's customer. Encourage your team to do business with them. Think of businesses you already work with and purchase from, and start there. Ask them if they know any business who could benefit from your services. Spend money where you make money.

## Perform

- Perform every task like the contract and the continued business depends on it—from booking the call to collecting payment and everything in between. Not only will this keep their business but can secure their referrals.
- Some businesses are willing to take a chance on a new contractor but the large majority would prefer to go with a referral from someone they trust. This is one of the reasons Commercial Marketing can be described as "taking care of a garden"—some seeds require little work to grow, while others require nurturing and constant care. You will run into the same experience with commercial customer relationships. How will these customers find you? Not in the way you may think.
- Have someone from your team start making site visits. A commercial site visit can be as simple as going and having lunch at a location whose business you want to win.
- Start doing business with the businesses you would like to serve in the future. Leave behind a pen, business card, brochure, etc. Say thank you for great service and ask to speak to the manager to let them know how much you appreciate the amazing service from their team.
- Mail a letter or send an email to the business asking if you can be their backup HVAC, plumbing, drains or electrical company. Follow this letter up with a phone call to ensure they received the letter. This piece is very important, be friendly and if the answer is no, ask if you can follow up in six months. **Then mark the date in your calendar six months later so you do not forget to follow up with the customer.**

**ServiceTitan makes following up on these potential customers more efficient.** Whether you create a task with the due date six months in the future or schedule the estimates follow up for six months out, ServiceTitan allows you to track everything. No more trying to remember who to call on which day or depending on Outlook, smartphone reminders or other software to keep track of your follow ups.

The other perk is accountability. No more asking if your sales team, techs or follow up coordinator has completed their follow ups, it is all tracked and recorded in ServiceTitan. You will also be able to track their closing rate.

## Forms

For most contractors, getting the staff to fill out any sort of form properly can be challenging. In most cases, the technicians take the path of least resistance and simply don't fill out the form at all.

In most cases, a process that **mandates that forms are filled out correctly** is the only solution. This may be a standard practice that only allows a technician to receive the parts they need if a proper part order form is filled out.

Still, unless your software requires a form to be filled out before the technician can proceed, the process is close to impossible to enforce.

**ServiceTitan solves this problem via “Smart Forms,”** which are typically triggered at the beginning or end of a technician’s visit and are usually tied to a specific Job Type.

For instance, a business owner or GM can choose to have a warranty form filled out on every warranty job. Just set up the form, tie it to your warranty Job Types, and create a trigger that forces this form to be filled out anytime a tech is dispatched to a warranty job.

After that, every time a warranty job is dispatched, a technician is unable to close out the job until the form is filled out with the proper information, **ensuring a true system of record.**

The best part about forms is their configurability. There are tons of fields that can be used to **create the perfect form for each job type.** As the business owner, you can make fields required, optional, or not appear at all.

Based on the data from thousands of ServiceTitan customers, we’ve aggregated the most useful and most popular forms used by Commercial companies and included them below. These forms can be input into your instance of ServiceTitan and tied to any job types you wish!

**All forms in ServiceTitan can be modified within your account to best suit your business needs.**

## Best Practice Forms for Commercial Businesses

Dozens of forms can be found in Titan Exchange (an easy way to source and share in-app content) and downloaded. Access TitanExchange via Settings > Titan Exchange > Networks > ServiceTitan Commercial Best Practices.

**AC Service Call Checklist (Condensed):** Used on an AC service call, this form gathers basic information from the AC unit without requiring a technician to put gauges on the system. Recommended for companies that want to collect general information on every AC Service Call.

**Arrival Checklist (Commercial):** Ensures the technician does things such as check in with the responsible party. We recommend this for all commercial jobs where the decision maker or responsible party is not the one who answers the door.

**Comprehensive AC Evaluation:** Like the AC Service Call Checklist (Condensed) but it collects more information. It is recommended for service calls such as a real estate evaluation, which requires a more in-depth analysis.

**Electrical System Report Card:** Allows an electrical contractor to verify that certain items in a building are inspected before the technician leaves the property, and helps ensure that pictures are taken as well.

**HVAC Estimate Process Checklist Commercial:** Ensures that the estimator gets certain information on every job walk, reducing the chances they will have to return to check something.

**Job Completion Checklist Commercial:** Helps remind the technician of tasks such as ensuring all materials were added to the job when the job is complete, that the job site is cleaned, etc.

**New System Start-Up Form:** This HVAC form ensures that pictures are taken at the end of an install job and that certain tasks, such as a proper vacuum taken on the system, were completed.

**Part Order Form:** Used in commercial companies that are not using truck replenishment, or for a special part that has to be ordered.

**Sewer Scope Report:** Used by plumbers to demonstrate the value of a sewer inspection to a customer, and potentially help sell a sewer replacement.

**Warranty Form:** Can be triggered any time a warranty call is created to ensure that part numbers are obtained on every warranty call.

**Water Heater Check-up Checklist Commercial:** Created to give instructions to a plumber on what to do and what to inspect when they go out on a water heater call.

For more information on form creation and triggers, see the knowledge base articles listed below.

<https://help.servicetitan.com/Content/Settings/add-a-form.htm>

<https://help.servicetitan.com/Content/Settings/question-types-on-forms.htm>

<https://help.servicetitan.com/Content/Settings/publish-unpublish-forms.htm>

<https://help.servicetitan.com/Content/Settings/set-form-triggers.htm>

## Staffing

For any company affected by seasonality, staffing for peak demand can be one of the most difficult tasks, but also the most rewarding when it's done well. Proper staffing increases revenue and employee happiness by ensuring your techs are always working the proper amount (with no idle time or overwork), and reduces inefficient cost by ensuring you are only paying when there's work to do.

**Proper staffing starts with accurate workload forecasting.** As long as you have a tracking mechanism to determine workload volume for your company in previous years, the task becomes a lot easier.

Don't assume that increasing revenue by 20% in a year requires an increase in staffing of 20%. In the Commercial space, a 20% increase in revenue doesn't necessarily mean you need 20 % more dispatchers. It may not even mean you need to increase the field staff by 20%. You may be able to increase your revenue by 20% by changing your product mix or by doing more large tenant improvements that don't require as much staff per dollar of revenue as service calls. Conversely, if you are doing more service calls you may need to increase field staff by 30% to see a 20% increase in revenue.

One of the best ways to make informed decisions is to track historical volumes and metrics. ServiceTitan unlocks the power of your internal data.

First, for dispatchers or CSRs, ServiceTitan tracks inbound call volumes. This can be done by:

1. Clicking on the magnifying glass in the upper right hand corner of the screen when you are looking at the dispatch board or dashboard.

2. From there you can select “Calls” from the dropdown on the top of the search screen and set the dates on which you want to check call volumes.
3. Be sure to click on “Call Direction” and click “inbound” to ensure that you are selecting inbound calls only.
4. Search for inbound calls in the same month of the previous year, then compare them to current call volumes.
  - a. If the inbound call volume is up 10%, you may need 10% more call takers than last year.
  - b. Alternatively, you could choose to free up 10% more call capacity for your existing CSRs by delegating some of their work elsewhere or automating some of their workflows entirely.

Also, check the number of calls each person is answering via the main dashboard. If three of your call takers are answering 400 calls per month on average and one is only taking 200, the data will point out the gap. The data also allows you to set a standard for calls taken before bringing on more people.

You can also set daily, weekly, and monthly goals, reward high performers and identify coaching opportunities with ServiceTitan data.

| CSR METRICS                                                                         |                   |       |       |        |                |                   |               |                           |
|-------------------------------------------------------------------------------------|-------------------|-------|-------|--------|----------------|-------------------|---------------|---------------------------|
| Agent Scorecards                                                                    |                   |       |       |        |                |                   |               |                           |
|                                                                                     |                   | CALLS | LEADS | BOOKED | PERCENT BOOKED | BOOKED FROM TOTAL | EXCUSED CALLS | AVERAGE INBOUND CALL TIME |
| JJ                                                                                  | Jennifer Johnston | 13    | 2     | 2      | 100 %          | 8.3 %             | 0             | 03:42                     |
| AT                                                                                  | Alissa Taylor     | 4     | 1     | 1      | 100 %          | 4.2 %             | 2             | 09:49                     |
| EM                                                                                  | Emily Mabie       | 24    | 11    | 9      | 81.8 %         | 37.5 %            | 0             | 05:24                     |
|  | Theos Rector      | 24    | 11    | 7      | 63.6 %         | 29.2 %            | 2             | 07:39                     |
| HH                                                                                  | Hailey Hodges     | 11    | 4     | 2      | 50 %           | 8.3 %             | 2             | 05:37                     |

As long as your employees who answer phones are booking calls correctly, you should be able to see your call booking rate per employee on the dashboard.

Many companies notice a decrease in call booking rate in the busy months because the schedule gets filled up and the customers don't want to wait. If this is the case, it's a sure sign that there was more demand than could have been filled during that time period. Keep that in mind when forecasting for the field staff.

The search screen is powerful, with tons of other metrics, including ways to track field performance. For now, we will limit the notes to back-office employees, but we'll talk about other ways to monitor field performance for staffing as well. To find out even more about the search screen, check out [this Knowledge Base article](#).

For forecasting field performance (and therefore staffing appropriately against it), use performance dashboards or automated reports within ServiceTitan. There is another article about reporting in this playbook and it can be found here:

<https://www.servicetitan.com/field-service-management/reporting>

When staffing for the busy season, most contractors are going to look at two metrics:

- 1) Average ticket of a technician in a given Business Unit (again highlighting their importance).
- 2) The number of jobs a technician can complete per day.

The math after having these two items is pretty simple.

- Take your total revenue goal for the month and divide it by the average ticket per job to figure out how many jobs must be done in order to achieve the goal.
- Then divide that number by the amount of jobs that a technician can do in a day. The result is how many technician days you need to fill for the month.
- Divide that number by the number of working days in the month and you get the number of techs you need for the month.

It's critical here to know these numbers well in advance of the need for those technicians. For instance, if your goal shows you need five more technicians in May than you currently have, you need to know that in January or sooner to begin the hiring and training process.

Given the difficulty in hiring technicians, the more notice, the better.

**The best part? All of these numbers can be pulled from the reporting section in ServiceTitan.** We know these are mission-critical to running your business and have set up different reports and knowledge base articles that showcase how to best access and use these (and other) key metrics:

<https://help.servicetitan.com/Content/Reports/custom-reports.htm>

<https://help.servicetitan.com/Content/Reports/schedule-reports.htm>

## Work Orders

When work has been approved and ordered, the work for the job can be started. In ServiceTitan, this is simply referred to as a Job (for us Work Order = Job).

 Creating a Project

 3rd Parties/Portals

Work can be approved in several different ways. The technician may be on site and get approval from a responsible party. In this case, the technician will be asked in the app if they are going to do the work now or later.

If they click on the button that says they are going to do the work now, the items proposed by the technician will be added to the invoice/job the technician is working on. They can begin work and then when they are finished, they can get a signature from the responsible party stating that the desired work has been completed.

If the technician needs to get parts (or for some other reason requires a delay of several days), then they would click on the button that says that they will do the work later. This will create a new appointment to be scheduled from the office for a later date.

The Job/work order that they are working on, usually a diagnostic job, is still valid. **In this case, we consider it best practice to bill for the time on the current job, which is usually diagnostic time.** That way the diagnostic work can be billed while the part that the technician needs comes in. At that point, the work that was approved will be done and billed upon completion.

A technician can also create estimates for approval online. These online estimates can be set up using the Knowledge Base article below:

<https://help.servicetitan.com/Content/Estimates/online-estimates.htm>

If an online estimate is used, a notification can be set up to alert the office staff that an online estimate is signed and a work order needs to be issued. Find out how to set up these alerts via the [article about online estimates](#) in the Knowledge Base.

Once the office gets the notification, they can dispatch the technician to the job to complete the work ordered, enhancing the customer experience by sending a technician as soon as humanly possible.

Finally, estimates can be created and sold from the office. When that happens, the approval can be received via email or online estimate. An article on writing estimates from that office can be found below.

<https://help.servicetitan.com/Content/Estimates/build-est-call-booking-screen.htm>

With the exception of the technician doing the work while they are on site for the initial service call, when a work order or job is put on the technician, for a given day, it will show up on their mobile device. They can click into the job and complete the work.

In the Commercial arena, it is quite common to receive signed proposals in many ways, but ServiceTitan is able to funnel that work to the technician in a way that is easy for them to track and complete.

## Invoicing Workflow

In Commercial, most companies have a formal invoicing process outside of the technician simply collecting payment while on site. In most cases, collecting payment on site in a commercial environment is just not possible.

In ServiceTitan, technicians do not have to email invoices directly to the customer from the field. In fact, most of our Commercial contractors discourage it. Commercial companies typically use the batching, posting, and exporting process in ServiceTitan to ensure that the invoices are sent properly to the customer, with no errors and no need to reprocess invoices at the end of a payment term cycle.

After a job is created in ServiceTitan, an invoice is considered “pending”. The technician can go out to the job, complete work, have the invoice reviewed by the person in charge of commercial billing to make sure that the requirements that the customer has have been met.

The customer may get a special discount or they may require a certain identification number on the invoice or ensure the correct tax rate is applied. For now, this is a manual process in ServiceTitan, but we have plans to automate it).

The completed invoices appear on the accounting screen.

Here is a link on how to make sure the customer PO is searchable and transfers to the invoice.

 Customer PO

After ensuring that the invoice is ready, it should be sent to the customer **before Batching, Posting, and Exporting**. That way, as the invoice is mailed out (either via email or standard mail), the employee responsible for the invoicing can batch the invoices one at a time, to make sure none fall through the cracks.

Think about Batching, Posting and Exporting this way:

- Batching your invoices is like placing all of them in an envelope for that day.
- Posting seals the envelope.
- Exporting is mailing the envelope to your accounting software.
- Once in your accounting software, the envelope is opened and organized based on your system.

After the invoice is mailed out, follow the standard process for batching, posting and exporting. A link to a Knowledge Base article on how to batch, post and export can be found below:

<https://help.servicetitan.com/Content/Invoicing/overview-invoicing-process.htm>

If you find you need to adjust or correct an invoice after it has been posted. Take accountability for the mistake and assure the customer you are updating your process to make sure the mistake does not happen again. Get with your team and make the necessary adjustments.

Here is the link to the Knowledge Base article to walk you through this process. [Creating an Adjustment Invoice.](#)

## Reports

### Most Impactful Reports

The most impactful KPIs for your business appear on the dashboard within ServiceTitan for easy and fast monitoring in real time. There are additional dashboards in the upper-left-hand dropdown, providing additional information. Easy-to-understand dropdowns that compile the data behind the metrics.

You can also add the reports you find most impactful for quick access and customize these dashboards in a way that suits your business and your goals.

Within ServiceTitan you get a customized reporting experience with hundreds of easy-access KPIs. You can get quick insights into every area of your business. Don't like the report? Simply add or remove KPIs so the most relevant information is right at your fingertips.

## Automating and Scheduling Reports

Reports that should be monitored continuously throughout the day should be added to the custom dashboard so that your team has quick access to everything they need to see at a glance.

For reports that should be monitored less frequently, once a day/week/month scheduling is best.

Scheduling reports to come to your team's email box at certain times **improves efficiency and encourages consistency in monitoring impactful business trends.**

Collaborate with your teams to determine what reports should be monitored, and when. Be sure to set clear expectations for what they are monitoring for and the steps that should be taken when things are not trending to goal or are not performing as expected. Anyone receiving a report should be given clear direction for what is expected.

Here's a [guide to setting up custom reports](#) and another [guide to scheduling them](#).

## Tags

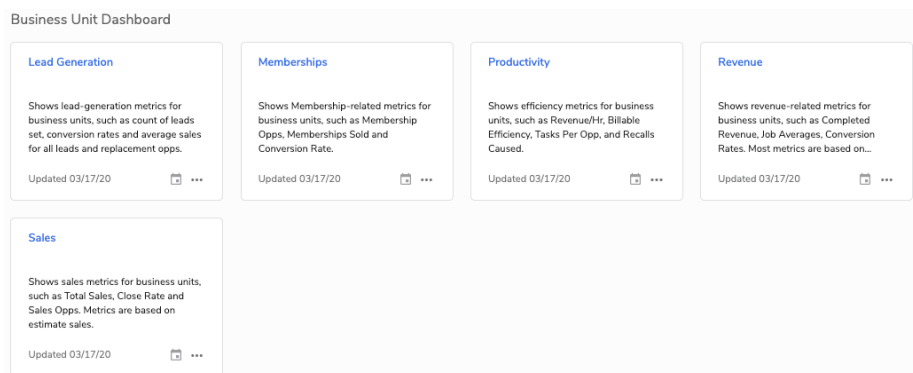
Having CSRs, dispatchers and other office staff add tags when booking jobs enables the filters for your reports. Tags can also communicate the stage of a job in the hold queue. Tags also allow you to narrow the data your report creates.

## Best Practice Reports by Role

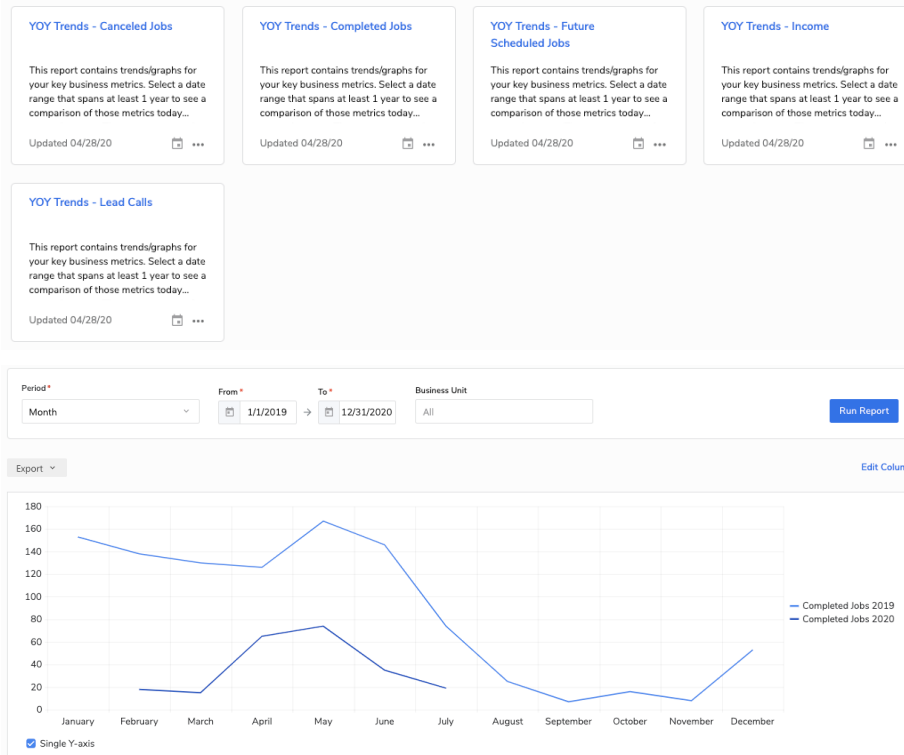
Below is a list of best practice reports for your Commercial business by role. These are the reports ServiceTitan customers to LOVE because they help drive insights and key actions to improve their businesses:

### Owner

- **Any of the reports in the “Business Unit Dashboard” Section.** Business owners want an aggregate view of the business, by business unit. Each report is specific to a certain area of interest and will match the metrics on the Dashboard.

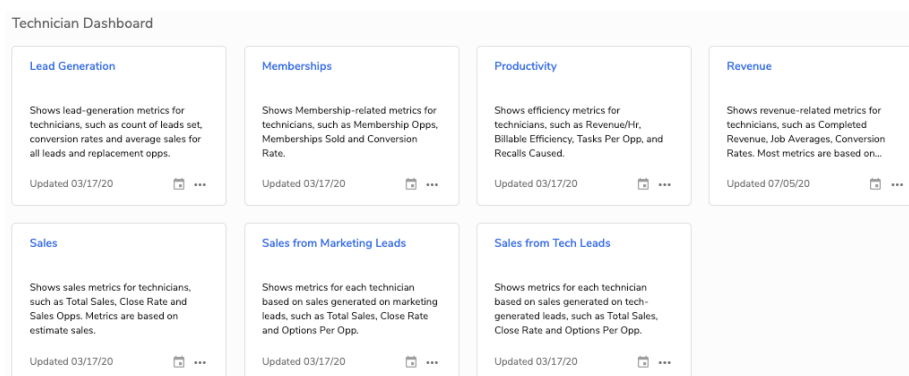


- **Any of the YOY Trends reports located in the “Other” section.** This macro view allows owners to view year-over-year trends based on month, week or daily periods for key business metrics.



## GMs

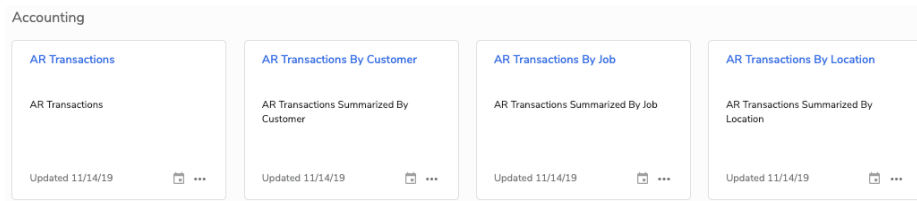
- Daily Huddle Report.** Can be run daily for detailed information at the Business Unit level. Metrics include goal and pace reporting, revenue, different conversion rates, and job averages.
- Technician Performance Board.** Shows performance at the individual technician level. ServiceTitan customers use it to track completed revenue, conversion rate, job average, replacement lead conversion, and work in progress.
- Any of the reports in the “Technician Dashboard” Section.** GMs will need to report on the metrics specific to their workflows and individual technicians. Each report is specific to a certain area of interest and will match the Technician Scorecards on the Dashboard.



## Accountants

- The “AR Transactions” Reports.** These reports match with the AR Management section of the invoice screen and allow accountants to see outstanding balances that need to be collected. **NOTE:** The “AR

Transaction” report is the only one of these reports that shows detail at the individual invoice level. The other reports are summarized (roll up) reports, so invoice-level columns (i.e. invoice status or job number) will not populate.



- **Deposit Detail.** Used to view payments applied to invoices (saved or charged) within each payment type, making it easy to get the full view of invoice balance changes in a period of time. The report can be run by job completion date, invoice date or “Paid On” date.
- **Jobs without Payments.** Contains a list of all completed jobs whose invoices have a total but do not have a payment. Can be grouped by technician as an organized way to follow up with those technicians who did not collect payment when they needed to.

## Office Managers

- **Call Center Performance by CSR.** Can be utilized to measure performance of individual CSRs and their ability to convert calls into revenue-producing jobs. This report includes metrics on calls taken, calls booked, jobs converted from calls booked, and cancellations from bookings.
- **Call Center Performance Summary.** Used to assess company performance of call booking at the Business Unit level. The roll up report includes metrics for completed jobs, recalls and percentage of jobs cancelled before and after dispatch.
- **Office Activities Report.** Tracks a list of various activities completed by your office staff. It can best be used for oversight and exception troubleshooting when reviewing actions made from the office.

| Date     | Time    | Name      | Action Type      | Action Performed                              | Job ID |
|----------|---------|-----------|------------------|-----------------------------------------------|--------|
| 7/8/2020 | 1:50 PM | rlloydemo | Estimate Updates | rlloydemo deleted an item from the estimate   | 786739 |
| 7/8/2020 | 1:50 PM | rlloydemo | Job Updates      | rlloydemo set NoCharge to True                | 786739 |
| 7/8/2020 | 1:50 PM | rlloydemo | Estimate Updates | rlloydemo sold an estimate                    | 786739 |
| 7/8/2020 | 1:50 PM | rlloydemo | Job Updates      | rlloydemo booked the job for 7/8/2020 8:00 AM | 791859 |
| 7/8/2020 | 1:50 PM | rlloydemo | Job Updates      | rlloydemo added Equipment Test tag to job     | 791859 |
| 7/8/2020 | 1:50 PM | rlloydemo | Invoice Updates  | rlloydemo added an item to the invoice        | 791859 |
| 7/8/2020 | 1:50 PM | rlloydemo | Invoice Updates  | rlloydemo added an item to the invoice        | 791859 |
| 7/8/2020 | 1:50 PM | rlloydemo | Invoice Updates  | rlloydemo edited the invoice summary          | 791859 |

## Payroll

- **Master Pay File.** This prebuilt ServiceTitan report is a hybrid report that can be used for GP (Gross Pay) for both commissions/bonuses and for hourly pay. \*This requires some configurations to be turned on by the CSM in some instances.

| Employee Name | Activity               | Invoice # | Gross Pay    | Paid Duration | Reg Hours | OT Hours  |
|---------------|------------------------|-----------|--------------|---------------|-----------|-----------|
| Bob           | Invoice Specific Bonus | 283137    | \$20.00      |               |           |           |
| Bob           | Working                | 281872    | \$40.34      | 2.02          | 2.02      | 0.00      |
| Bob           | Driving                | 283137    | \$3.00       | 0.15          | 0.15      | 0.00      |
| Bob           | Working                | 283137    | \$25.00      | 1.25          | 1.25      | 0.00      |
| None          | None                   | None      | Sum: \$88.34 | Sum: 3.42     | Sum: 3.42 | Sum: 0.00 |

- **Payroll Detail Report.** Can be used to see calculated commissions, bonuses, default adjustment commission and sold by commissions. Accountants rely on this report for Performance GP (gross pay) for their people. See details [here](#).
- **Technician Timesheet Summary.** A roll-up view of timesheets and hours worked. It adds up job events and non-job events (by timesheet code) per day. Accountants and technician managers utilize this report for payroll and performance tracking. See details [here](#).

## Job Costing

- **Jobs Data Set and Project Job Costing Data Set.** This loom video explains how to build a custom job costing report in these data sets - [How to Build Job Costing Report in 2.0](#) (4 Min)

Below are the Job Costing Metrics now available in both the Jobs data set and Project Job Costing data set (include metrics with Payroll Persistence)

- |                                                         |                                                                 |
|---------------------------------------------------------|-----------------------------------------------------------------|
| <input checked="" type="checkbox"/> Material Costs      | <input type="checkbox"/> Material Costs As % of Sales           |
| <input checked="" type="checkbox"/> Equipment Costs     | <input type="checkbox"/> Equip. Costs As % of Sales             |
| <input checked="" type="checkbox"/> PO Costs            | <input type="checkbox"/> PO Costs As % of Sales                 |
| <input type="checkbox"/> Materials + Equip. + PO Costs  | <input type="checkbox"/> Materials + Equip. + POs As % of Sales |
| <input checked="" type="checkbox"/> Payroll Adjustments | <input type="checkbox"/> Payroll Adjustments as % of Sales      |
| <input checked="" type="checkbox"/> Total Costs         | <input type="checkbox"/> Total Cost As % of Sales               |
| <input checked="" type="checkbox"/> Performance Pay     | <input type="checkbox"/> Performance Pay as % of Sales          |
| <input checked="" type="checkbox"/> Labor Pay           | <input type="checkbox"/> Labor Pay as % of Sales                |
| <input checked="" type="checkbox"/> Labor Burden        | <input type="checkbox"/> Labor Burden as % of Sales             |

#### RESCHEDULE REASON SURVEY

- |                                                         |                                                        |
|---------------------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> Rescheduled Reason (drilldown) | <input type="checkbox"/> Reschedule Survey Answered By |
|---------------------------------------------------------|--------------------------------------------------------|

#### SUMMARY

- |                                                    |                                                  |
|----------------------------------------------------|--------------------------------------------------|
| <input checked="" type="checkbox"/> Total Revenue  | <input checked="" type="checkbox"/> Gross Margin |
| <input checked="" type="checkbox"/> Gross Margin % |                                                  |

- **Job Costing Flyout.** Flyouts are located on the "Invoice Screen" and "Project Screen". They can give you different levels of job costing on the invoice or project level depending on whether the configuration "Display Performance/Labor Pay in Job Costing" is turned on. The job costing flyout Knowledge Base article has clear explanations of the Performance and Labor Pay section and can be seen [here](#).
- **Technician Performance.** A roll-up report for macro reporting on individual technicians. Great for Owners, GMs and Technician Managers. Data points closely mirror the Business Unit Performance Report Template.
- **WIP (Work in Progress) Report.** Shows all active projects and accounting-related KPIs. It's intended for companies that have jobs that span multiple months in order to see the progress of projects over time. This report can also be backdated to see data in the past. This helps you better project work in progress within your accounting.

## Inventory/Purchasing

- **Aggregate Inventory Stock Report.** Used to view the current stock of every item in your inventory. It can be filtered or sorted by Inventory Location and will show you quantities of Available, On Hold, On Order and On Hand. It's a helpful report to check the current state of their inventory across statuses.
- **Purchasing Report.** Used to track individual inventory items through purchasing transactions. Examples of purchasing transactions would be POS, Transfers, Adjustment, Bills and others.

Tracking work in place using projects is also very common with commercial businesses. Here is the link to the [Knowledge Base article](#) on how to do this.

# Alerts

## Setting Alerts within your company

Alerts allow you to manage your business without having to constantly monitor and dig for information. These real-time notifications ensure that problems are immediately identified and fixed.

**To get the most out of alerts, inform the team member receiving the alert of the expected response for every alert you have set up.** In addition, to ensure maximum efficiency, ask team members to review the list of available alerts to see if any of them could improve efficiency and response time for their role.

But be thoughtful when setting up alerts. Excessive alerts often end up being ignored. For any alert set up, make sure the team is leveraging them to take action.

## Use alerts to monitor activity

Standard ServiceTitan functionality allows an automatic text message or email when certain parameters are met. For instance, Lee's Air in Fresno, Calif., uses ServiceTitan alerts to automatically send an email when a warranty form is filled out. Before ServiceTitan, Lee's had trouble tracking warranties. Now, ServiceTitan is set up to force the warranty form to be filled out on every warranty Job Type, and the appropriate people get an email alert when the form is completed. This ensures that warranty parts are being tracked and that credits are being given from the supplier.

A step by step guide to setting up alerts can be found [here](#).

The screenshot shows the 'Add alert' interface. On the left is a sidebar with a search bar containing 'alert' and buttons for 'Integrations', 'Alerts', 'Dispatch Board', and another 'Alerts' button. The main area is titled 'Add alert' and contains several dropdown menus and input fields. The 'Type' dropdown is open, showing options like 'Booked Job', 'Abandoned Call' (which is highlighted), 'Booking Request Dismissed', 'Booking Request Received', 'Call Recording Paused', 'Canceled Job', and 'Completed Form On Job'. Below this is a 'Job Type' dropdown set to 'Provide Sales Estimate', a 'Job Priority' dropdown set to 'Normal', a 'Technician Teams' field with 'Sales' selected, and a 'Tags' field with 'Potential Member' selected. At the bottom are 'Save' and 'Cancel' buttons.

Below is a list of alerts ServiceTitan recommends to keep your company well-informed and improve efficiency:

**Abandoned Call.** Points out poor customer service and need for more CSR capacity. This alert can also alert to the need to call potential customers back to try to book them. Send the alert to the head of the call center and the person in charge of marketing.

**Unbooked Call.** Save calls and determine whether the call was truly unbookable. This alert helps identify issues with capacity (needing more techs for a department) and can identify calls that could be used for training for new CSRs. Use Case: An increase in a department's unbooked calls could signal the need for more technicians in that department. This alert is sent to the head of the call center and the person in charge of marketing.

**Completed Job.** Used for any manager who wants to know when specific jobs are closed.

**Booked Job.** Used to notify key management and sales estimators of new jobs.

**Open Estimate.** Sends a notification to the tech, dispatcher, and manager that the estimate is open. This allows follow-up with the customer while the estimate is still fresh in their mind, to answer any questions they may have.

**Sold Estimate.** Used to alert sales management and production of a sold job.

**Task Used.** Example: When a warranty task is used, this alert can prompt steps to submit the warranty request to be paid.

**Unsold Job.** Used to monitor technician performance and provide real-time coaching to technicians in the field. This alert should be set to go to an immediate manager prepared to reach out to the technician when the alert comes in. Catching unsold jobs as they occur can turn technician performance around in real time and ensure the technician remains motivated to sell throughout the day.

**Completed Form On Job.** A secondary team member needs to review some forms as they are completed, or action needs to be taken. A common example is a technician lead capture form. Once this form is completed, a team member needs to be notified to take the appropriate next steps to schedule with the customer. Review all forms being used by your company to determine whether it would be helpful for someone to be notified immediately, or whether a bulk review is better. If someone needs to be notified immediately, an alert should be used.

A few Commercial best practice examples for completed forms on jobs are:

- **Permits:** Some companies trigger a permit form to be filled out when a task is used that requires a permit. An alert would be set up to notify whomever is responsible for filling out and acquiring the permit.
- **Refrigerant Tracking:** EPA-required refrigerant tracking of major leaks in systems can be recorded on this form, with an alert that prompts an update of the master record.
- **Parts Order:** When a part needs to be ordered, the technician fills out the form with the required information and details for the follow-up visit. An alert would notify dispatch and the purchasing department of those needs.
- **Warranty Form:** When this form is completed on a warranty call, an alert can be sent to the warehouse for processing the warranty claim and sending the parts back.

**Customer Signed Online Estimate.** Set up to go to the call center to follow up with the customer and get the accepted work booked. This alert can also be set up to go to the person who created the estimate so they are informed when the work is sold. An important part of remote or contactless experience, the call center should be cautious and only follow up with jobs in completed status.

**Email Delivery Failed.** Should be set up to prompt the call center to contact the customer and update the email address. This alert is especially important when you first transition to a paperless system, because email is how the customer will receive information on the job and future follow-up.

**Invoice Email Delivery Failed.** Should be set up to go to whoever is managing AR. For invoices with a balance, this allows for immediate follow-up.

**Sold Estimate.** The sold estimate alert should be set up for those job types where next steps are needed. It is common for certain job types to require other actions (such as installs and projects), and can be leveraged to ensure the right people (warehouse, coordinators) are informed.

**Task Used.** Most commonly used to automate processes and procedures and keep key players informed. In addition, the task can be used to trigger the next steps. For example, if a water heater is installed, a permit or inspection may be needed. The task alert can trigger that workflow.

**Technician Requests Additional Appointment.** Alerts dispatch

**Canceled Job.** This alert should be used to notify all interested parties when a job is canceled. It can be set up in general or customized by Job Type, campaign and Business Unit. A general alert set up for the call center manager

or a designee is recommended, to trigger an immediate review and attempt to save the customer. A customized alert is recommended for high-dollar Job Types or expensive campaign types, sent to managers/owners. In addition, a customized alert should be set up for Job Types that may require planning and ordering (such as installs), to ensure that coordinators and the warehouse are notified as soon as possible to prevent unnecessary ordering/setup.

## Commercial Membership Types

### Membership Types

Commercial contracts are all unique based on the size of the customer, frequency of visits needed and the types and amounts of equipment to be serviced. For clarity, ServiceTitan uses one common phrase for service agreements, PM work or annual maintenance: **Memberships**.

ServiceTitan customers can customize contracts or PMs and track them under memberships. ServiceTitan customers are able to give discounts and add tags to the customer record, identifying them company-wide as a membership customer.

ServiceTitan recommends creating **one shell membership type with all of the billing options you wish to utilize (monthly, annually, quarterly etc.) as a sales task with a price of \$0**. Customize the membership once it's sold on the customer's record by adjusting the billing amount and the recurring services that have been agreed to as part of the contract.

### To sell/add the commercial contract

1. Navigate to the location record and click Sell Membership in the top right corner.
2. A popup will come up, select your commercial membership type from the dropdown and then select the billing cadence. Complete the other necessary selections, then click Create.
3. This will generate an invoice for the sale of the membership/contract. If you are charging the customer immediately for the first payment, click the edit pencil to the right of your sales task on the invoice. When the edit window opens, update the price accordingly. If one-time billing, enter the full amount. If monthly, divide the full amount by 12 then enter that amount into the price field.
4. Once the invoice is adjusted, click the "View Membership" button at the top middle of the invoice.
5. Click on the edit pencil in the top right corner.
6. Scroll down to Billing template and click edit, then adjust the price accordingly if you have ongoing billing for the membership.
7. Scroll down to Recurring Services, and from the dropdown menu add the recurring services you want to provide for this contract. Note: These are pre-built in settings, but once added to the membership contract you can edit the defaults.

# Recurring Service Types

Recurring services are regular service visits that are typically included with Commercial contracts (memberships). For example, quarterly jetting or seasonal HVAC maintenance. Recurring service events are generated based on the recurring service type frequency, which can automatically generate events to be booked as Jobs.

For Commercial contracts, these recurring services are used to customize the contract to fit the needs of each customer. Below are some examples of commercial recurring services you may use with your contracts.

**Grease Trap Jetting:** Restaurants need their grease traps and drains jetted regularly to prevent backups. It is common to set up this type of maintenance quarterly, or in a cadence of every X number of days.

**Ice Machine Maintenance:** Ice Machines have specific procedures required to keep running at peak performance. Setting up a recurring service appointment with the specific things needed assures they continue to operate as intended.

**Chiller Maintenance:** Commercial Chillers require complex maintenance procedures to be performed, including cleaning the tubes, testing the water, etc. Use recurring services to automate these crucial services.

**Generator Maintenance:** Commercial companies rely on backup generators To ensure they work properly when needed, they must be properly maintained. It is common to set annual or twice-per-year maintenance, depending on the generator type and region.

**Filter Changes:** Commercial properties have large numbers of units, and filter changes do not always fall in the same cadence with general maintenance. The best practice is to have a recurring service type specifically for filters, with a frequency of quarterly, bi-annual, or annual depending on the filter size and systems.

**Cooling Maintenance:** General maintenance for the AC equipment on site (Condensers/Coils/Heat Pumps) is normally done once per year, before summer temperatures get too high.

**Heating Maintenance:** General maintenance for the heating equipment (Furnace/Air Handlers/Boilers) on site. This maintenance is normally done once per year, before fall/winter temperatures get too low.

**Hot Kitchen Equipment:** Restaurants and food services equipment requires recurring maintenance. Recurring services for hot boxes, fryers, ovens, etc., should be set up per manufacturers' recommendations, because it is critical to safety and performance.

**Water Treatment:** Water treatment equipment needs regular regeneration/flushing and salt added. These maintenance visits can be as frequent as monthly but are commonly also done quarterly.

**ServiceTitan knowledge base article on recurring services:**

<https://help.servicetitan.com/Content/Memberships/recurring-services.htm>

# Custom Fields

There are important things your business will want to track and report that do not have fields natively in ServiceTitan. Custom fields solve that problem. These powerful options help you capture key information. Below is a suggested list of custom fields specific to commercial services.

## Customer PO#

**Where:** Job Record / Job Ticket on the call booking screen

**Why:** Commercial customers regularly supply a PO number to be tied to the work performed, and require that PO number be present not only on the invoice but also on paperwork or in portals. Adding this custom field to the job record ensures the technician sees this information and can use it accordingly.

Note: For the customer PO# to show on the invoice, book the job first, then on the job page click the edit pencil and add the customer PO# in the customer PO field.

## Location Type

**Where:** Location Record

**Example Options:** Restaurant, Supermarket, Convenience Store, Medical Facility, Strip Mall, etc.

**Why:** This information helps the dispatcher get the most qualified technician to the job, helps the technician fully understand what type of environment he will be working in, and allows reporting on the profitability of different customer types, how often you serve them, and provides greater business insight.

## NTE (Not To Exceed)

**Where:** Job Record / Job ticket on the call booking screen/Location Record

**Why:** Enter the NTE amount for the specific job being run so that it is visible to the technician on the Job detail page in mobile. This ensures that the technician knows that any work over that amount needs to be submitted for approval before work can be done. When paired with the NTE tag, this becomes even more powerful.

## Job Types

Setting up Job Types is critical for consistency in training and reporting. Simplifying Job Types makes it easier to book incoming calls and train CSRs on the required info to gather for each type. When booking a job in ServiceTitan, selection of the correct Job Type allows for proper reporting and triggers advanced functionality such as technician skill sets. Tags can be set to automatically be added depending on Job Type, and certain job Types, such as maintenance, could trigger a required form. For these reasons, choosing the correct Job Type when booking a job in ServiceTitan is critical.

Some best practices for setting up and Using Job Types:

**Set Up and Use Job Types:** Set up the job types for the work you will be performing (Warranty, No Cool, No Heat, Estimate, etc.). There is no need to set up Job Types by Trade (e.g. Plumbing Service), as the job type can be under a Plumbing Business Unit. Instead you can use a "Service" job type with the correct Business Unit to denote which

part of the business performed the work. Here are sample of common job types used:

No Cooling  
Backflow Maintenance  
Preventative Maintenance  
Clogged Toilet  
No Power

[This link](#) will take you to the best practice job types used by contractors who run Commercial jobs.

Here are some additional ServiceTitan best practices for getting the most out of job types for reporting. Correctly setting up the below is **ESSENTIAL** for **ACCURATE SALES TRACKING**.

**Sold Thresholds:** This is a Job Type setting that define the dollar amount that you consider a job is sold or converted. Setting a Sold Threshold \$1 above your Dispatch Fee ensures that you don't give your technicians sales credit for only selling the dispatch fee.

**Non-Opportunity Jobs:** Not every job you book will be a sales opportunity (e.g. Install Jobs, Recall, etc). Don't count as a sales opportunity jobs you do not expect the technician to sell. Marking a job as a non-opportunity will not count the job against the assigned technician's sales numbers. If the technician does happen to sell on a non-opportunity job, they will still receive credit for the sale.

## Skills

Skills help ensure that the right technicians are assigned to jobs that require specific skills or certifications to complete the work. Sending a technician without the right skillset to a job can be costly and creates a bad customer experience. ServiceTitan makes it easy to identify specific skills, enabling your dispatching team to send the right tech to the right job.

These skills can include items like technical ability, certifications, equipment they are qualified to use and approved job site conditions.

For instructions on how to set up and edit skills, refer to the knowledge base [article](https://help.servicetitan.com/Content/Dispatching/tech-skills.htm):  
<https://help.servicetitan.com/Content/Dispatching/tech-skills.htm>

Example Best Practice Commercial skills include:

**Security Clearance:** These skills help ensure that the right technicians are assigned to jobs that require special security clearance. These are common when servicing airports, hospitals, military bases and government buildings.

**Install:** For technicians who have the skillset to install equipment in compliance with code.

**Diagnose/Troubleshoot:** Technicians who are advanced in diagnostics and troubleshooting.

**Service/Maintenance:** Identifies technicians who can do both service and maintenance calls proficiently.

**Repair:** For technicians who are skilled at making repairs.

**System Design & Sizing:** For technicians and sales professionals who can accurately design and size mechanical, plumbing, sewer or electrical systems.

**License:** To easily identify which techs hold a valid license. Some states require a certain ratio of licensed techs to apprentices on the job.

**EPA:** Shows that the required EPA certification has been met to handle refrigerant.

**Low Voltage:** Low voltage shorts and problems can be tough. This skill is for those who have proven the ability to troubleshoot those issues.

**Low Temp/Refrigeration:** Tech has required a skill set to work on all low temp/refrigeration products (reach-ins, walk-ins, etc.).

**Chiller:** Tech knows chiller systems and can service, repair, diagnose, troubleshoot or install.

**Controls:** Tech is familiar with system controls for large commercial work.

**Sheet Metal:** Tech can fabricate duct transitions or other ductwork on the job site.

**Line Tracing:** Tech can find and trace electrical lines.

**Backflow:** To designate that a technician has their backflow certification and can perform backflow tests.

**Smoke Test:** Tech who is trained on locating a leak in a sewer line with smoke.

**Line Locate:** A tech who can operate locating equipment to find sewer and or water lines.

**Roof Vent:** A drain tech who knows how to clear a line via the roof vent.

**Trenchless:** tech has proper safety training on running trenchless machines.

**Jetter:** To designate that a technician has the required certification/licensing/training to safely operate a jetter on a jobsite.

**Backhoe:** To designate that a technician has the required certification/licensing/training to safely operate a backhoe on a jobsite.

**Camera:** Tech has been trained on camera equipment for sewer, water or ductwork. Can record and mark issues found in lines.

**Forklift:** To designate that a technician has the required certification/licensing/training to safely operate a forklift.

**Trencher:** To designate that a technician has the required certification/licensing/training to safely operate a trencher on a jobsite.

**Scissor Lift:** To designate that a technician has the required certification/licensing/training to safely operate a scissor lift on a jobsite.

**Bucket Truck:** To designate that a technician has the required certification/licensing/training to safely operate a bucket truck on a jobsite.

**Range Hood:** Tech can perform the maintenance required for fire protection.

## Tagging and Tracking Jobs

In addition to Job Types, jobs have Tags in ServiceTitan. They are visual indicators on a job that can also trigger various alerts and allow businesses to generate reports based on them.

Contractors use Tags for a multitude of things. We recommend only using Tags that are relevant to your commercial business. To make things simpler, ServiceTitan has pre-made Tags built in. These are the most commonly used Tags across the thousands of contractors who use ServiceTitan.

Contractors can also create their own Tags. For more information on how to set up Tags, here is the knowledge base article on how to manage tags.

### [Managing Tags](#)

| <b>ST Suggested Tags</b> | <b>Dispatch Board Shortcodes</b> | <b>Why</b>                                                                                                            |
|--------------------------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Bad Debt                 | BD                               | For any customers who have had a debt not paid to company.                                                            |
| Billed                   | Billed                           | Allows AR to communicate with field and office on status of the ticket.                                               |
| Credit Hold              | CH                               | Allows the accounting team to communicate to team that customer has not paid or needs a credit application.           |
| Crane/Sub                | Crane                            | Communicates this ticket cannot be moved due to other contractors onsite.                                             |
| Commercial Customer      | Comm                             | Indicates this customer is commercial.                                                                                |
| Discount                 | Disc%                            | To be used to identify customers who get a special discount.                                                          |
| Do Not Move              | Hard Schedule                    | Hard Scheduled job. Allows the team to know what CANNOT be moved.                                                     |
| Do Not Service           | DNS                              | Use this when a customer is no longer serviceable and you have ended the service relationship.                        |
| Estimate Approved        | EstA                             | Allows more efficient communication between dispatchers and other team members while the ticket is in the hold queue. |
| Estimate Needed          | EstN                             | Allows more efficient communication between dispatchers and other team members while the ticket is in hold queue.     |

|                        |                             |                                                                                                                                                                                       |
|------------------------|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Estimate Submitted     | EstS                        | Allows more efficient communication between dispatchers and other team members while the ticket is in hold queue.                                                                     |
| Extra Tall Ladder      | EXT LAD                     | Good to use if you have limited resources and need a certain tech for this job.                                                                                                       |
| Follow-Up              | FOL                         | Allows the office and field to communicate quickly on which tickets need more follow-up.                                                                                              |
| Gate Code              | Picture of Key              | Shows the tech to look for a pinned note with a gate code to access the property.                                                                                                     |
| High Value Job         | Picture of Fire             | Keeps jobs with higher profit or revenue numbers on the job ticket.                                                                                                                   |
| Inspection             | Picture of Magnifying Glass | Allows everyone to know when a job is scheduled to have an inspector come and check the jobsite.                                                                                      |
| Invoice Fee            | InvFee                      | Reminds the accounting team and estimators to add the invoice % fee. This is charged for commercial customers who require more time and effort in the back office or are slow to pay. |
| IVR                    | IVR                         | Communicates to techs they need to login to the IVR machine once arriving on jobsite.                                                                                                 |
| Left a Voicemail       | VM                          | Communicates who has been contacted and we are awaiting their call back.                                                                                                              |
| \$Membership Renewal\$ | MR                          | Indicates that the customer is up for renewal.                                                                                                                                        |
| Maintenance            | MNT                         | Shows on the dispatch board who is scheduled to receive maintenance.                                                                                                                  |
| Member                 | MEM                         | Allows you to see who is a member of your service agreements/contract/PM.                                                                                                             |
| Needs 2 techs          | 2 Techs                     | Allows dispatchers and managers to know when multiple techs are needed for one job.                                                                                                   |
| Net 15, 30, 45         | Net 15, Net 30 or Net 45    | To label payment terms, making it easy for Techs to know when not to collect onsite.                                                                                                  |
| Parts Needed           | PN                          | Allows Hold tickets to be filtered quickly and communicate without opening tickets.                                                                                                   |
| Parts Ordered          | POrd                        | Allows Hold tickets to be filtered quickly and communicate without opening tickets.                                                                                                   |
| Parts Received         | PR                          | Allows Hold tickets to be filtered quickly and communicate without opening tickets. Also show dispatcher tickets are ready to be rescheduled without interrupting technicians.        |
| PO Required            | PO Req                      | Good to use for the office to ensure a customer-provided PO is received before job is booked.                                                                                         |
| Portal                 | Portal                      | Communicates to the office and techs that all paperwork needs to be submitted through the portal.                                                                                     |
| Recall/Callback        | Recall                      | Allows the office team and tech to know there was an error and this job needs special care.                                                                                           |
| Replacement Opp        | REP OPP                     | Allows special attention to be shown on these job tickets.                                                                                                                            |
| Rescheduled Needed     | Resch                       | Allows the dispatcher to mark a ticket which needs to return to later.                                                                                                                |

|                  |         |                                                                                                                                              |
|------------------|---------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Reviewed         | >       | A way to communicate which job tickets have been reviewed and are ready for the manager to review costing, time and margins before batching. |
| Safety Harness   | SafH    | Great for commercial sites and customers with steep roofs. Tech can be prepared for this job.                                                |
| Signoff Required | SignOff | Communicates to techs, managers that they need to sign off on paperwork while on the jobsite.                                                |
| Same Tech        | SM Tech | Let everyone know this job cannot be moved from assigned tech.                                                                               |
| Small Tech       | Small   | For tight crawl spaces or attics.                                                                                                            |
| Special Handling | SpecHan | A customer who requires "special handling," longer call times, needs extra attention.                                                        |
| Tax Exempt       | TaxEx   | Allows the team to communicate that the tax exemption cert is on file and this customer has special tax handling.                            |
| Type 5 NTTC      | TYPE5   | Communicates where tax can be charged.                                                                                                       |
| Type 9 NTTC      | TYPE9   | Communicates where tax can be charged.                                                                                                       |

## Account Setup Workflow

### [Workflow at a birds eye view](#)

Once a company has identified an ICP, created a plan for departments and has an idea of what positions are needed on the team, what next?

Setting up a customer's account, if done correctly, makes finding information and tracking Jobs quick and easy. If not ...

"We ran into a major issue at an apartment complex," Vanessa Gonzalez of Albuquerque Plumbing, Heating & Cooling said. "Tracking down the right invoice with all the information we needed was beyond frustrating. We had three people searching through no less than 100 invoices trying to find the one tied to the apartment having the issue. Three people spent almost 10 hours looking for this one invoice. I knew there had to be a better way."

There is. When creating a new commercial customer account, set it up to be easily trackable within ServiceTitan, starting on the billing side, by collecting the following information:

- Billing Location Name:
- Billing Address:
- Accounts Payable contact:
  - Name
  - Email
  - Phone Number
- Do they require a PO?
- Do they have a standard NTE?

- Who is approved to book work?
- Who can approve estimates?
- Are they billable?
  - Net 15
  - Net 30
  - Net 45

Having a software that makes this information easy to see and track is imperative for handling large commercial accounts. ServiceTitan allows you to track the required information and communicate with the entire team what the customer needs.

Every time a customer calls, their information will appear on the booking screen, allowing the CSR booking to easily collect required information.

Including the store number/apartment number in the location name allows your team to track all work done, correspondents, estimates and equipment at these locations. Once this information is collected you are ready to book your first work order.

With commercial businesses, one location can have multiple bill-to contacts. Example: One vendor will be responsible for the fire protection equipment and another will be responsible for the water heater at a single restaurant location.

Keeping this straight can be a challenge. Making sure the correct bill-to is used keeps your customer from losing trust in your services. ServiceTitan makes it easy for CSRs to be certain they have the right account. We recommend a tag to identify the commercial vendor and a pinned note.

Here are some helpful links for more information:

[Managing Tags](#)

[Managing Pinned Notes from the Office](#)

[Pinned Notes on Mobile](#)

 Black Pearl Enterprise 1 PO Required Not To Exceed

 Jack Turner #34 345 Kraken Way, Beverly Hills, CA 90210 USA

 Jack Turner #46 567 Barnicle Way, Malibu, CA 90263 USA

 Davy Jones #365 3421 Pirate Way, Ventura, CA 93003 USA

 Davy Jones #355 8769 Flying Dutchman Ave, Pirate Cove, CA 90275 USA

## Jack Turner #34

Location PO Required Not To Exceed

Black Pearl Enterprise  
Customer

345 Kraken Way, Beverly Hills, CA 90210 USA ?  
Address

(222) 222-2222  
Mobile Phone

Invoice Signature  
Required

### Notes

Leave a note...

 **Vanessa** said (pinned):  
Will Turner, Jack Sparrow approve estimates.  
6/18/2021 1:17 PM

Key information to include:

Is the customer COD or billable?

Who is the correct bill-to?

What are the billing terms?

Have there been billing issues in the past (slow to pay, no payment received)?

Is there a credit hold?

ServiceTitan allows you to track terms and add a custom field, a tag and/or a pinned note. It also allows you to remove the ability to book a Job for the customer until they have brought their account current.

## Creating a Project

Need a way to combine multiple work orders into one invoice? Creating a project will allow you to see all invoices, PO's, materials cost, payments and balance due associated with the project. Here is how to do this in ServiceTitan.

 Creating a Project

## Billing

### Billing Change

In Commercial, the need to update a Job to bill to a different company from the one that owns the property (or the one that you typically bill) is common.

To make the change:

- Book the Job as normal, then click on the edit pencil on the top right-hand corner of the Job record.
- On the edit screen go to the Customer field and edit the name of the bill-to customer you want for **this specific job**. This will make sure the service history still stays with the location but the billing for this one job is updated to bill the alternate customer.

Example: You do work for Whole Foods, but for this specific job billing needs to go to ABC Property Management, as they manage the strip mall from which the store rents space.

**Edit Job**

Tags

Business Unit

Campaign

Type

Skills

Priority

Location

Customer

Customer PO#

☒ No Charge/Non-Opportunity

## Customer Credits

Some commercial customers negotiate a discount for customers who pay their bills by a certain date or criteria.

Normally the customer is sent the full invoice and then they pay the invoice less than the credit amount. To settle the balance to \$0 on the invoices and account for the cost of these credits, follow the steps below.

*ServiceTitan account configurations are needed. Enable separate print adjustment invoices for another contact, Allow changing a customer for adjustment invoices. Create adjustment invoices before the original invoice.*

**Invoice #** [REDACTED]

# 1000722    4/5/2021 8:52 PM    Preventative Maintenance - Refrigeration    [REDACTED]    Exported    [REDACTED]

Job    Completed On    Job Type    Business Unit    Status

\* 6/10/2021    \* NET 45    \* [REDACTED]

Invoice Date    Payment Term    Batch

This invoice is an adjustment for another invoice (#1000722)

Update invoice details >

Add a payment \$0.00 >

Add a purchase order >

Job Summary    Semi-Annual Refrigeration Preventative maintenance SR#1-4832979014 NTE\$105.00

Bill To    [REDACTED]    Service Location    [REDACTED]

Rate Sheet    [REDACTED]

Invoice Summary    Unspecified ...

Payment Due    7/25/2021

Subtotal    \$-11.05    Sales Tax 7.25%    \$0.00

Total Taxes    \$0.00

Total    \$-11.05

**Tasks**

| Name           | Description      | Taxable                  | Quantity    | Unit Price | Total           | GL Account                                                       | Business Unit |
|----------------|------------------|--------------------------|-------------|------------|-----------------|------------------------------------------------------------------|---------------|
| 3rd Party Fees | Third Party Fees | <input type="checkbox"/> | 1.00        | \$-11.05   | \$-11.05        | Service Revenue Adjustments:Contract Adjustment:Third Party Fees | [REDACTED]    |
| <b>Total</b>   |                  |                          | <b>1.00</b> |            | <b>\$-11.05</b> |                                                                  |               |

## Setup

1. Create a pricebook service task called "Third Party Fees" or "Customer Credits" and map it to the corresponding GL account you want effected. Example: Service Revenue Adjustments:Contract Adjustment:Third Party Fees
2. If you do NOT want the customer to see the credit line applied on their statements or when reprinting the invoice, you will want to change the customer name on the adjustment invoice. It is recommended that you create a customer to assign these to or use the customer record for the company. Example: Create a customer named "Third Party Fees" or "Customer Credits."

## Process (Once payment is received)

1. On the original invoice click "Add Adjustment Invoice" in the left hand menu.
2. IF you want to change the customer name, click on Update invoice details, select the Customer field and select the "Third Party Fees" or "Customer Credits" customer.
3. Click on "Add a task" on the left hand menu. Search for your "Third Party Fees" or "Customer Credits" task. Select it from the drop down and update the price to be the negative of the amount showing owed. Example: Customer bill \$1,000, Customer Credit is 10% so customer paid \$900 with \$100 left due. You would enter -\$100 in the task.
4. Batch, post and export the adjustment invoice to your accounting system.

## Ratesheet Billing Feature

Our Customer-specific pricing feature allows you to set up prices for a customer who has negotiated a specific rate with you. Most residential contractors don't use this and the feature is not intended for them. Commercial business owners, though, need to know that it's possible and should have this enabled during onboarding. If not, your Customer Success Manager can enable the setting called "EnablePricingEngine."

# Content Portal

The content portal allows you to send communications directly to your technicians so that they aren't lost in their email inbox and can be conveniently used/seen when needed.

Below are some great examples of ways to utilize this feature.

1. **Training:** Send training materials such as videos and pdf files. Instead of handing out paper materials during a meeting, have them preloaded into the portal. Service Managers can load information and materials ahead of time and schedule when they want them to be seen and by what technicians. You can also repost these if you want to use them again.
2. **Motivation:** You can run contests and send out leaderboard updates via the portal to keep your team engaged.
3. **Recognition:** Who doesn't love being recognized? Whether it be for a birthday, anniversary or just hard work, you can easily send out recognition to an individual or the team. Those who feel recognized and valued are more loyal and work harder for their company.
4. **Warranty/Recall Notices:** Keep your team up to date on warranty or recall issues on equipment you may service.
5. **How To:** Have a tricky task that usually requires help from a senior tech or field manager? How about loading a how-to video or step-by-step instructions your technicians can utilize in the field instead.
6. **On-Call schedule, Company Calendar:** This is a good way to make sure everyone has accurate schedule information.
7. **Phone Numbers:** Your vendor contact list or your office/tech contact list can be loaded, cutting down on technicians calling your main phone number just to be transferred to accounting.
8. **Safety Information:** Red-tagging units, COVID updates, Crane signaling quick guide, JSAs, etc.
9. **IVR/Portal information** technicians need onsite.

# Task Management

Task management is the process of handling the entire life-cycle of a task, from planning to tracking to execution. It helps teams track tasks, set deadlines, prioritize, and assign tasks to the right people.

Streamlining processes will ensure the likelihood of all the steps being followed the same way every time, giving the same experience no matter who is executing the task. Below is a sample list for common uses for task management:

- Customer concerns (complaints)
- Permits
- Refunds
- Responding to reviews
- Team reviews annual and or 90 day.
- Parts ordering

Get your team involved in developing task management processes that fit into their current work flow. Having their buy-in will ensure the process is followed and used, this gives the team ownership of the changes.

How will you know it is working successfully? You'll have consistency of processes, increasing customer satisfaction, and happier team members.

New team members can execute a task, after training, the same way as a seasoned team member. And companies can track how well processes are being followed, and which need to be changed or improved upon.

### **Additional Tips**

- Make sure once you implement a task management process everyone follows it, including leadership.
- Keep the steps simple. A complicated process with many steps will be less likely to be adopted by your team.
- **Service Titan Best Practice:**
  - Create a task for concerns/bad reviews. This will attach it to the customer record and can show a customer's patterns.
  - Create a tag that communicates to your team which customers require extra attention.

### **Resources**

- Knowledge Base article on common uses:
  - <https://help.servicetitan.com/Content/office-basics/task-mgmt-intro.htm>
- Knowledge Base article for setting up task management:
  - <https://help.servicetitan.com/Content/office-basics/task-mgmt-setup.htm>
- Knowledge Base article on management tasks and subtasks:
  - <https://help.servicetitan.com/Content/office-basics/task-mgmt-workflows.htm>

## **Commercial-Specific Features**

ServiceTitan regularly adds features and functionality that affect all companies using the software. There are, however, key features designed specifically with contractors who service commercial properties in mind.

These Commercial Specific Features are:

### **Customer-Specific Pricing**

Customer-specific pricing allows contractors to set up prices for customers who have negotiated a specific rate. Most residential contractors don't run into this, and the feature is not intended for them. Commercial business owners, though, need to know that it's possible. Have this enabled during onboarding or add it afterward by having your CSM turn on "EnablePricingEngine."

### **Project Tracking Suite**

Several features rolled into one allow commercial business owners to track the progress of Jobs, bill progress payments to their customers, track budget vs. actual costs and, finally, track opportunities on projects, such as upsells or change orders.

The names of the individual features are:

- Budget vs. Actual
- Progress Billing

- Opportunities on Projects

Here is a Knowledge Base article on [how to use job costing in ServiceTitan](#).

Many companies, when they start out on ServiceTitan, simply set up the basics. They make it so that they can receive a call, send a technician out to a job, complete the job, collect the payment, deposit it and record it in their accounting software. This is the critical base to get started and grow from.

Setting up [Project Costing & Tracking](#) can be the next step.

To get the most out of ServiceTitan, and be able to use features such as project tracking, some things need to be implemented. These things include time tracking and making sure that technicians are clocking in and out of the Jobs properly.

This does not mean that they need to clock in to two places. If the business is using timesheets in ServiceTitan, then it is fairly easy. Proper time tracking in ServiceTitan and recording material costs to the Job are both required for ServiceTitan to track costs properly.

Knowledge Base articles on time tracking and material tracking can be found below.

<https://help.servicetitan.com/Content/Payroll-and-Timesheets/timesheets-overview.htm>

<https://help.servicetitan.com/Content/Pricebook/adding-materials.htm>

## Multiple Invoice / Estimate Print Options

Commercial contractors on ServiceTitan have made it clear they need different options when printing invoices, because the commercial landlord or property manager or national account has required it, or for other reasons.

So, ServiceTitan created a feature that allows different invoice and print options.

Talk to your CSM about the Estimate and Print options when setting up this feature. Some [can be easily modified with the procedures in this Knowledge Base article](#).

## Project Tracking

Contractors know they need to watch and track project costing. Tracking this is how we figure out what our margins are, which projects have the largest margins, where efficiency can improve, and which project should NEVER be done again.

Better tracking will show holes in effectiveness, poor efficiency, higher than average material costs or overages in labor. Tracking will also show you if the job was bid correctly, or if pricing needs to be adjusted. Your budget for the project would be set up in the bidding process, and the actual numbers will populate once the job starts.

(Screenshots from Service Titan reporting are below)

Reporting shows how much of the budget is left and the dollar amount of the variance.

While Service Titan is not the only solution, it allows many fields that can be customized to make the reporting as detailed as needed. It also breaks the numbers down by department, phase of the project, and which phase has been billed.

Tracking the budget outside of your software leaves more room for human error, and assures the latest version of the spreadsheet is being used by everyone.

### Additional Tips

- Review your number daily until the project is complete. This will allow you to make real-time adjustments and keep your project on budget.
- **ServiceTitan Best Practice:**
  - *Make sure your CSM has turned this feature on to be able to use it.*
  - *You do not need to have progress billing turned on to use project job costing, but the features will work together if desired.*

### Resources

- Knowledge base article:
  - <https://help.servicetitan.com/Content/Jobs-and-Projects/project-tracking-overview.htm>
- Knowledge base article Project Job costing overview:
  - <https://help.servicetitan.com/Content/Jobs-and-Projects/project-tracking-overview.htm>

## Time & Materials Pricing

Many residential contractors use some flavor of flat rate billing, but in the Commercial arena, time and material pricing practices are still very common. They can even be required by certain accounts. As a result, ServiceTitan has a workflow that allows contractors to use a simplified pricebook that charges for time and materials.

There are a couple of ways to do this. One way is to upload all the materials into your pricebook so that when a technician goes into the field, they can pick an item from their pricebook and instantly add it to an invoice. The other way is to simply make a generic service in the pricebook called "Material" and make it customizable in the field. Then the technician can enter the price they need to charge the customer for material.

The first way allows the contractor to have a lot of control around the cost of materials, because they are all in ServiceTitan. But it takes a lot of work by the contractor part to enter all those materials into ServiceTitan.

The second way is faster and easier to get up and running, but leaves a lot of room for error in the field.

ServiceTitan has a lot of time tracking capability in the field, so charging for time can be done in a couple of ways too.

One way is to simply make a "Labor" service in the pricebook that has the price for one hour of time, then have the technician input the quantity next to it. If the technician had 2.5 hours on the job, they would enter 2.5 in the quantity section on the invoice and ServiceTitan would do the math.

But the process gets more complicated if the contractor sets different labor rates for different types of work, for instance. More detail can be found in the Knowledge Base article below.

It is also possible for a contractor to use a flat rate pricebook in certain situations and a time and material pricebook in others. The contractor can set up one category they could call Flat Rate and one category called Time and Material, with the details differing for each. More information also be found in the Knowledge Base article below.

<https://help.servicetitan.com/Content/Invoicing/time-materials-billing.htm>

## Customer Notifications

Automated customer notifications provide one of the best benefits of ServiceTitan for many contractors. The system makes the customer feel informed and delivers a professional appearance on behalf of the contractor. But in the commercial realm, some contractors can run into a problem.

When a technician is sent to a Job, a notification can automatically be sent to the contact listed on the client's account. A contractor can design the notification to have the technician's name, a short bio, a picture or company logo, etc., to be delivered as a text message to the customer.

In a commercial environment, if not managed properly, this could lead to hundreds of text messages being sent to the contractor's largest customer at one time. For instance, if one person oversees a chain of stores and several technicians are sent to several stores in one day, text messages would be sent for each of them.

In ServiceTitan, a commercial contractor can regulate which notifications are sent, and when— or turn them off globally, or on a one-off basis for customers who don't want or need notifications.

The Knowledge Base articles below includes step-by-step instructions on how to turn notifications on and off.

<https://help.servicetitan.com/Content/Customer-Communications/enable-dispatch-notifications.htm>

<https://help.servicetitan.com/Content/Customer-Communications/mute-commercial-jobs.htm>

<https://help.servicetitan.com/Content/Customer-Communications/business-units-communications.htm>

## Change Orders

Inevitably, especially in a commercial environment, a change order will be needed. A change order, for the purposes of this article, is simply a contract that is tied to another job. It needs a signature just like any other proposal or Job.

To accomplish this in ServiceTitan, create a new job tied to the existing project so all the contracts, Jobs, etc., can be tracked in one place. The only difference with a change order versus the initial proposal is that the change order is labeled as such so the contractor can easily see what the initial proposal was and what the change order entails.

An article with step-by-step instructions and screenshots on how to set up a change order in ServiceTitan can be found here:

<https://help.servicetitan.com/Content/Jobs-and-Projects/project-tracking-change-orders.htm>

## End of Month Closeout - Accounting

### Accounts Receivable

**Report Name:** Accounts Receivable (Summary)

**Report Description:** ST- AR Reconciliation report

**How to create:** Default Report

**Link to Sample Report:** [Sample Accounts Receivable \(Summary\)](#)

**Purpose/Importance:** The report shows the accounts receivable exported to make sure it reconciles to QB AR amount reflected in the balance sheet. Customer is using ST for operational purposes (who owes the money) and using the accounting system to make sure this is properly being reflected in the balance sheet. Everything that hits AR needs to go through ST.

**Report Name:** Month-End: Pending Invoices Audit

**Report Description:** Verify all ST invoices for the month have been batched and exported to QB

**How to create:** Accounting--> Invoices. Filter to show only the invoice status as "pending."

**Link to Sample Report:** [Example Month End Close Pending Invoices Audit](#)

**Purpose/Importance:** The financials are kept in QB, so make sure your balance sheet and P&L are complete. If the invoices are not exported to QB, sales and AR will be understated. If there is sales tax liability attached to the invoice, then the liability will also be understated.

**Report Name:** Month-End: Payments Reconciliation

**Report Description:** Verify all payments have been applied to ServiceTitan invoices for the month and they have been batched and posted to QuickBooks

**How to create:** Accounting--> All payments. Filter to only show the payment status as "pending."

**Link to Sample Report:** [Example Month-End Payments Reconciliation](#)

**Purpose/Importance:** If payments are not exported to QB, the balance sheet will not be complete. In the case of a refund (negative payment), the undeposited funds or bank account will be overstated or the refund liability payable (if set up to that account) will be understated. This can cause issues because the company will not be aware that they have to cut the check for the customer.

**Report Name:** Month-End Invoices with No Tasks or Materials

**Report Description:** Invoices with no tasks attached to them

**How to create:** Accounting--> Invoices. Filter to only show the empty invoice as "TRUE."

**Link to Sample Report:** [Example Month-End Invoices with no Tasks or Materials](#)

**Purpose/Importance:** This can be a report that those auditing the invoices can print. It would be unusual for an invoice to not have any task or material attached to it. This would be a report that the client can use to ensure the technicians did not forget to add a task or material. Sometimes it can be normal not to have any tasks or materials attached to an invoice depending on the job (Recall, warranty, etc.). Take this report and filter out the Job Types and Business Units that would not be expected to have any tasks or materials attached.

## Others - Bad Debt/Deferred Revenue

**Report Name:** Accounts Receivable- Summary

**Report Description:** Bad Debt Expense

**How to Create:** Default Report

**Link to Sample Report:** [Example Accounts Receivable- Summary/Bad Debt](#)

**Purpose/Importance:** It is important that the AR list is complete for cash flow planning purposes and so that the financial statements are accurate. Without writing off bad debt, customers are overstating AR (ultimately overstating cash) and sales income. This also helps management review bad debt metrics and helps management establish a plan to prevent more bad debt in the future (i.e collecting earlier, requiring deposits on jobs > certain \$ amount, etc).

**Report Name:** Deferred Revenue

**Report Description:** Deferred Revenue

**How to Create:** Default Report

**Link to Sample Report:** [Example Deferred Revenue](#)

**Purpose/Importance:** Use the "active" membership status report to tie the DR balance in ST to DR balance in QB. Use the "cancelled/expired" membership status report to verify that there is no activity occurring. The deferred revenue column should be 0 because for "cancelled/ expired" memberships, any deferred revenue should be recognized at the date of cancellation/ expiration.

Loom video on how to utilize the Deferred Revenue reporting in ST

<https://www.loom.com/share/17fd8099b449450cb3cf8dc5f714a6d4>

## That's all!

THANK YOU for choosing to be a part of ServiceTitan.

These best practices are intended to ensure maximized business results both independent of and through ServiceTitan, so we hope you found value in what we've provided.

If you have insights that you would like to share and potentially have them added to this playbook, please click this link in order to submit your idea. [Idea Submission Form](#).