ServiceTitan Project Tracking
Setup & Training Checklist

Resources	Links
Construction Landing Page	[Knowledge Base](#)
Budget Vs Actuals Learning Path	[Academy](#) (Self-Paced)
Progress Billing with Application for Payment	[Academy](#) (Self-Paced)
Project Tracking Overview with Product Manager	[Zoom Link](#) Password: 0#58%sj7
ServiceTitan Professional Partner Hub	Interested in a coach/consultant? Get more information [here](#)

Complete	Recommended Setup and Training Task(s)
☐	**TRAINING STEP 1** **Attend/Watch the Project Tracking Training Series (REQUIRED)** See training links for which users should be attending each workshop. ☐ Live: [Project Tracking Setup](#) Recording: [Project Tracking Setup (#1)](#) ☐ Live: [Project Tracking Workflows](#) Recording: [Project Tracking Workflows (#2)](#)
☐	**TRAINING STEP 2** **Assign Self-Paced Academy Courses to your Project Teams - quick tip [here](#)** ☐ [Budget vs Actuals](#) ☐ [Progress Billing with Application for Payment](#) ☐ [Dispatching Crews](#)

☐	**SETUP STEP 1 – UPDATE EXISTING SETTINGS**
	Review and update your existing ServiceTitan Settings and Configurations to make sure you're ready for Project Tracking
	The following setting changes include recommended best practices for operational efficiency and accurate costing, setting up your account for successful Project Tracking success!
	
	Business Units & Reporting Settings
	By creating or confirming your Business Units, Trade, and Divisions, this ensures your reporting and accounting setup will support your project work.
	☐ Separate business unit(s) set up for construction (Or commercial etc) [KB Article](#)
	☐ Separate trade(s)/division(s) set up for construction (Or commercial etc)
	
	Technicians
	☐ **Settings >Technicians:**
	  ☐ Hourly pay rates added* and confirmed
	  Please note that if hourly pay and/or burden rates are not updated, you will not be able to track real-time labor costs. Maintaining your pay rates ensures accuracy of costs.
	  ☐ Burden Rates added [KB Article](#)
	  ☐ Project Labels applied based on the type of labor performed (this is for the timesheets to have labels for the actuals on budget vs actual tables).

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	Job Types
	☐ **Create Job types** set up for each project phase (Highly recommended), examples include but not limited to:
	    ☐ Rough In
	    ☐ Trim Out
	    ☐ Startup
	    ☐ (Any way you phase out your work)
	
	Project Statuses
	☐ **Settings > Project Statuses** KB Article Default statuses but can customize sub-statuses
	☐ Project labels assigned to each job type (Optional)
	
	Invoicing / Email Templates
	☐ **Email > Application for Payment** tab. (Used if emailing to customer)
	
	Task Management
	    ☐ **Task Sources** - Add project-related sources such as General Contractor or Project Team
	    ☐ **Task Types -** Review your types to include support Project Management tasks / to-dos across your teams KB Article
	    ☐ **Task Resolutions** - Ensure the resolutions support the needs for Project Teams
	OPTIONAL:
	 Settings > Purchasing/Inventory > Configuration > Display Services on Invoice Closeout
	Evaluate if you would like Services to be available to progress bill using the Invoice Closeout functionality (Job or Project invoices). Invoice Closeout is typically used in conjunction with Requisition and Inventory Management functionality. Discuss this option with your ServiceTitan representative or your ServiceTitan Certified Provider* to ensure this tool will support your billing needs.
	
	*Are you looking for a coach or consultant to assist you with the configuration, change management, implementation, and continued success of this feature-set across your organization? ServiceTitan Certified Providers are available to support you! Learn more here.

☐	**SETUP STEP 2 – UPDATE NEW SETTINGS**
	Configure New Settings Update > Project Settings
	With the activation of Project Tracking, new features and settings are activated in your ServiceTitan Account. Default settings are configured for you, but you are required to set it to your preferences to meet your business needs.
	Project Settings: KB Article
	    ☐ **Create Project Labels** KB Article
	    ☐ **Default Preferences**: Set a default label for the different types. (Note if the PB item has a label already, then the labels used as default will not be added).
	    ☐ **Project Setup**: *Percentage of Completion (POC) Method* is our recommended default. The Work In Progress report is based on POC revenue recognition.
	    ☐ **Retainage:** (*Optional for those that use it*) KB Article
	    Create a project label for retainage that will help with reporting later.
	    ☐ **Project Business Unit:** (Optional) Decide if you want to pre-set BUs on project level

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	Project Types: KB Article Default Project Types: Project Types enable you to modify the layout of your project records while making it easier to find projects in your account. ☐ Example: Hide or show the BvA table on certain project types ☐ Reporting now lets you filter by Project Types and/or Project Statuses **Application for Payment** ☐ **Settings > Application For Payment**-(it is required to setup retainage even if you do not use retainage on your applications for payment) KB Article **Costing:** Default is Committed Cost & Actual Costs KB Article **Feature Gates available 69-1** ☐ Committed Costs in Job Costing (ST-69.1) (Support can Enable) ☐ Budget vs Actual General Ledger View (ST-69.1) (Support can enable) ☐ Setting > (Accounting) Payroll GL Mapping KB Article
☐	**SETUP STEP 3 – Prepare your Pricebook for Project Estimating & Billing** **Pricebook Setup**: (Recommendations) KB Article *Consult your Accounting/Billing Team to reduce integration errors & billing issues.* ☐ Service created for customer billing ☐ Service created for each type of labor offered (check off labor service checkbox) ☐ Average cost for labor included in Estimated Labor Cost field ☐ Apply labor labels to each type of labor (Default added via project setting > default preference) ☐ Apply material labels to each material that will be used in projects (Default added via project setting > default preference) ☐ Apply equipment labels to each equipment that will be used in projects (Default added via project setting > default preference)
☐	**SETUP STEP 4 – Build & Personalize Views to Access & Analyze Projects** **Portfolio, Reports & Dashboards built to support your Project Reporting Needs** ☐ **Project Portfolio Default View:** Set your user-specific default view to quickly access your priority projects KB Article ☐ **Work In Progress Report:** Use the Work in Progress (WIP) report to calculate the correct amount of recognized revenue for projects based on the Percentage of Completion method KB Article. ☐ **Project Costing Dataset** - As costing and revenue are more likely to be at a 'Project' level with Project Tracking, you may need to access and/or build reports to support your reporting needs. ☐ **Construction / Commercial Dashboard** Once it's in your account, you will be able to view a pre-built Dashboard based on Project-level datasets.

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☐	**SETUP STEP 5 – GRANT/RESTRICT ACCESS BY USER ROLE**
	Role Permissions to ensure proper access to tools and potentially sensitive data
	 ☐ **Project Permissions**
	     ☐ Attach job to project
	     ☐ Detach job from project
	     ☐ Delete project and location opportunities and estimates
	     ☐ Edit business unit on project
	     ☐ Show financials - This permission will (1) hide the Financials section (Budget vs Actuals) of each Project and (2) prevent the download of the BvA table.
	     ☐ View Project Portfolio
	     ☐ Edit project type on project (KB) - *recommended to restrict to Project Managers and Administrators*
	     ☐ Override project type settings on project (KB)
	 ☐ **View labor costing details** - This permission will allow employees to view labor details such as labor pay, labor burden, performance pay & payroll adjustments.
	 ☐ **Reporting Permissions (Templates)**
	     ☐ **WIP Project Report**
	 ☐ **Construction/Commercial Dashboard** > Share Access