



Accounting Roundup Fall 2021

Product Updates for Accounting Admins

Payments

Click any feature name to view the Knowledge Base article

Check out our latest enhancements designed to streamline and improve the ServiceTitan accounting experience.

These updates include content from the following releases:

ST-52

5/25/21

ST-53

7/14/21

ST-54

8/26/21

ST-55

10/13/21

▶ [Mobile deposits on sold estimates \(ST-52\):](#)

When technicians collect deposits in mobile for sold estimates they can easily tell if the deposit was successful. The technician can see the remaining balance and paid amounts in the payment page and also in the sold estimate page.

Pay

Job	Total: \$750.00	Paid: \$1,000.00	Balance: \$0.00
		Overpayment: \$250.00	DONE

▶ [Improved flow when editing payment amount with Payment Collections \(ST-52\):](#)

Editing the payment amount is now quicker given the reduced clicks you need to take to correct the amount.

▶ [Payment Collections Fixes \(ST-52\)](#)

- Invoice balances correctly display on the Payment page when an invoice has a negative balance and the adjustment invoice has a positive balance.
- Payments collected on blank or \$0 invoices display in ServiceTitan Mobile so the technician can verify the payment was processed.
- When payment is created and applied at the same time, the BU of the payment is populated to match the BU of the invoice when the payment applies to one invoice, regardless of where the user performs this action.

Have an idea to improve invoice, statements, or reporting in ServiceTitan? Post it in the *Ideas* section of Community to gain support from your peers and share them with our product team.



▶ [Edit refund amount with automated refunds \(ST-53\):](#)

Previously, if a refund amount needed to be changed, you had to delete the refund and create a new one. Now you can edit the refund amount provided you have the correct permissions.

▶ [Project number added to Payment Collections \(ST-53\):](#)

In the **Apply to Invoice** section of the **Collect & Apply** Payment screen, project numbers are now displayed for invoices with a positive balance that are part of a project. There's no longer a need to open an invoice to see the project number.

Invoice	Project	
58241 Current	22913	

▶ [Refund invoices for each invoice \(ST-53\):](#)

To quickly see if an invoice has related refunds, the **Adjustment Invoices** section of the **Invoice** screen lists refund invoices as well as adjustment invoices.

▶ [View unapplied credits offset by refunds \(ST-53\):](#)

Unapplied payments that are fully refunded now appear in the **Unapplied Payments** section of the **Customer** page. Refunds display as negative payments below the original payment. Users can now edit the refund or original payment even when it is fully refunded.

▶ [Export unapplied refunds to Intacct \(ST-53\):](#)

The Automated Refund Workflow now exports refund payments not applied to an invoice to Intacct.



▶ [Collect payments for customer statements \(ST-54\):](#)

When you select **Receive Payment** for a customer from the **AR Management** screen, on the **Collect and Apply Payments** screen, the payment amount prefills with the total balance due. The field is editable if you want to receive partial payment. This makes payment collection more efficient and accurate.

▶ [Display payments on sold estimates \(ST-54\):](#)

Payments on sold estimates linked to a project are now included in the **Payments** total of the **Project Summary** and the **Payments** section of the project record. This provides a more accurate account of payments received on a project.

▼ Project Summary Learn More		
	Amount	Percent Complete
Contract Sum	\$50,045.00	0.0% Edit
Expenses	\$10,850.00	101%
Total Earned	\$36,000.00	72%
Total Retainage	\$0.00	0%
Invoiced	\$36,000.00	71.9%
Payments	\$0.00	
Totals		71.9%
AR Balance	\$36,000.00	
Balance to Finish (Including Retainage)	\$14,045.00	

▶ [Enhanced auto-apply payment rules \(ST-54\):](#)

In your **Payment Collections** settings, the improved layout makes it easier to read and edit your payment auto-apply rules.

