

Customer & Location Page Redesign

Find the information you need in a breeze.

Your customers expect quick service, and not having an easy way to find relevant information slows down your business operations.

That's why we've redesigned the Customer and Location pages to help you get the information you need faster while increasing your productivity. This guide will walk you through the changes you can expect to see rolled out with the ST-64 release.

WHAT'S NEW

- ★ Navigation Menu
- ★ Action Buttons
- ★ Filter & Sort
- ★ Pagination
- ★ Improved User Interface (UI)

Click on the numbers below to learn about some of the changes.

The screenshot displays the ServiceTitan interface for the 'Customer' and 'Locations' sections. Numbered callouts highlight specific changes:

- 1**: Customer sidebar navigation menu.
- 2**: 'Add Location' button in the Locations section.
- 3**: Location table header and data rows.
- 4**: Location table pagination controls.
- 5**: 'Switch to Old Design' button in the Billing Preferences section.

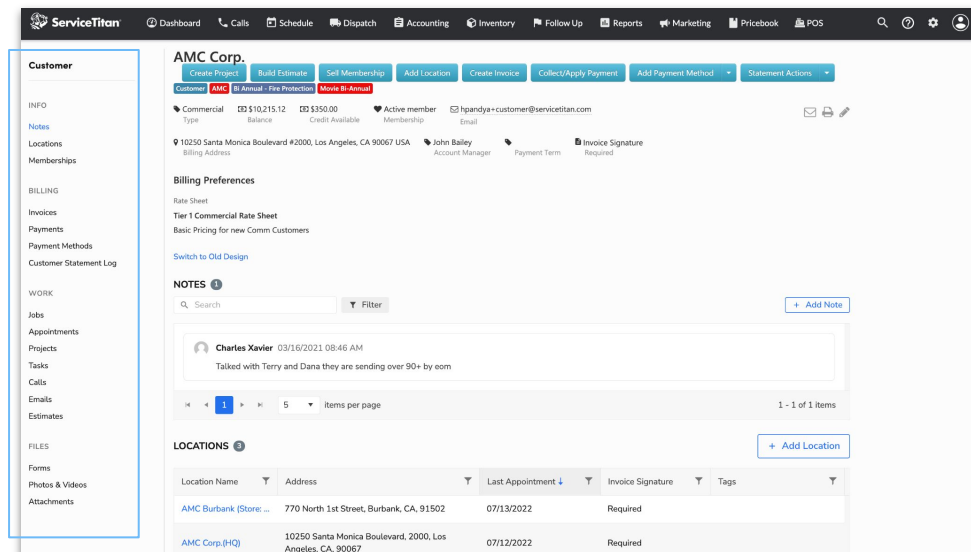
Customer Page Details:

- Customer:** AMC Corp.
- Buttons:** Create Project, Build Estimate, Sell Membership, Add Location, Create Invoice, Collect/Apply Payment, Add Payment Method, Statement Actions.
- Info:** Commercial, Balance \$10,215.12, Credit Available \$350.00, Active member, Email hpandya+customer@servicetitan.com.
- Address:** 10250 Santa Monica Boulevard #2000, Los Angeles, CA 90067 USA.
- Account Manager:** John Bailey.
- Billing Preferences:** Rate Sheet, Tier 1 Commercial Rate Sheet, Basic Pricing for new Comm Customers.
- Notes:** Search, Filter, Add Note.
- Notes Content:** Charles Xavier 06/16/2022 08:46 AM. Talked with Terry and Dana they are sending over 90+ by eom.
- Locations:** 3 locations listed.

Location Name	Address	Last Appointment	Invoice Signature	Tags
AMC Burbank (Store: ...)	770 North 1st Street, Burbank, CA, 91502	07/26/2022	Required	
AMC Corp.(HQ)	10250 Santa Monica Boulevard, 2000, Los Angeles, CA, 90067	07/01/2022	Required	
AMC Sunset (Store: 7..)	8000 Sunset Boulevard, Los Angeles, CA, 90046	06/25/2022	Required	

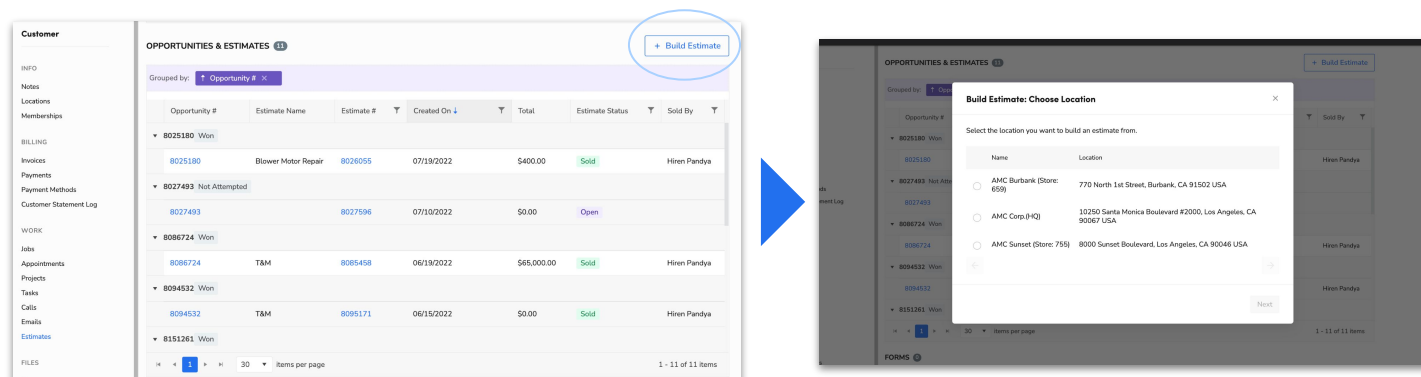
Navigation

We've made it easier to get the exact information you need by introducing a navigation menu. This lets you jump to that section rather than scroll down the page.



Action Buttons

We made it simple to complete tasks by adding an action button for most sections. Let's say you need to book a new job, build an estimate, or create a project—you can do so right from that section. Simply click on the action button, and the process begins right from here.



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Filter & Sort

You can now filter and sort within sections to get the exact view you need to see. Simply click on the Filter icon and filter down your results. This lets you hone in on specific Business Units for Jobs or a particular period of upcoming Invoices due. Additionally, clicking the column header will let you sort the rows.

JOBS 47										+ Book Job	
Job #	Job Type	Business Unit	Last Appt	# of Appts	Technicians	Priority					
13148867	Door Install	Garage	07/24/2022	1	Helen Boucher	Normal					
13202755	Door Repair	Garage	07/11/2022	1	Bobby Boucher	Low					
8731075	No Cool	HVAC	07/05/2022	1	Edson Garcia	High					
8484308	No Cool	HVAC	07/01/2022	1	Bobby Boucher	High					
8143427	Trim Out	HVAC	06/29/2022	1	Edson Garcia	High					
8129936	No Heat	HVAC	06/22/2022	1	Edson Garcia	High					
8127502	No Heat	HVAC	06/15/2022	1	Edson Garcia	High					
8125070	No Heat	HVAC	06/14/2022	1	Edson Garcia	High					
8123534	No Heat	HVAC	06/13/2022	1	Edson Garcia	High					

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JOBS 47										+ Book Job	
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8123534	No Heat	HVAC	06/13/2022	1	Edson Garcia	High					

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Pagination

You have a lot of data in ServiceTitan, and not knowing how much you have to sift through can be a problem. So, we added pagination to each section. For example, let's say you have hundreds of invoices; after sorting and filtering, you can easily click through the pages in that section to find the exact invoice(s). Additionally, you can select how many rows of data you see. Use the dropdown next to the page numbers to see either 5, 10, 20, or 30 rows displayed.

INVOICES

+ Collect Payment

Invoice #	Invoice Date	Invoice Due Date	Invoice Total	Invoice Balance	Batch #
12191686	06/29/2022	06/29/2022	\$5,000.00	\$5,000.00	1649
13202755	06/28/2022	09/26/2022	\$2,000.00	\$2,000.00	1365
13148867	05/13/2022	05/13/2022	\$2500.00	\$2500.00	1301
8143427	12/14/2022	12/14/2022	\$20,000.00	\$0.00	956
8731075	06/05/2022	09/03/2022	\$1130.24	\$0.00	562
8480324	04/16/2022	04/16/2022	\$581.88	\$0.00	477
8189763	02/18/2022	02/18/2022	\$1,456.00	\$0.00	357
8112323	01/29/2022	01/29/2022	\$30,000.00	\$0.00	314
8108136	01/07/2022	01/07/2022	\$10,000.00	\$10,000.00	266
8107526	01/06/2022	02/20/2022	\$6,745.32	\$6,745.32	264
8106970	01/05/2022	01/05/2022	\$15,000	\$5,000	262

1

2

30

items per page

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Switch to Old Design

We're temporarily providing the option to revert back to the old design if you're struggling with the changes at any point in time. You can do this by clicking the Switch to Old Design link below the Customer Summary. This will let you go back to the old design, while still having the option to go back to the latest design.



This is Just the Beginning

These enhancements are part of a larger initiative to improve the Customer and Location pages, so it becomes easier to find the information you need quickly. We are planning more improvements down the road with future releases, so stay tuned!

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