

# Creating Open Jobs Report in ServiceTitan

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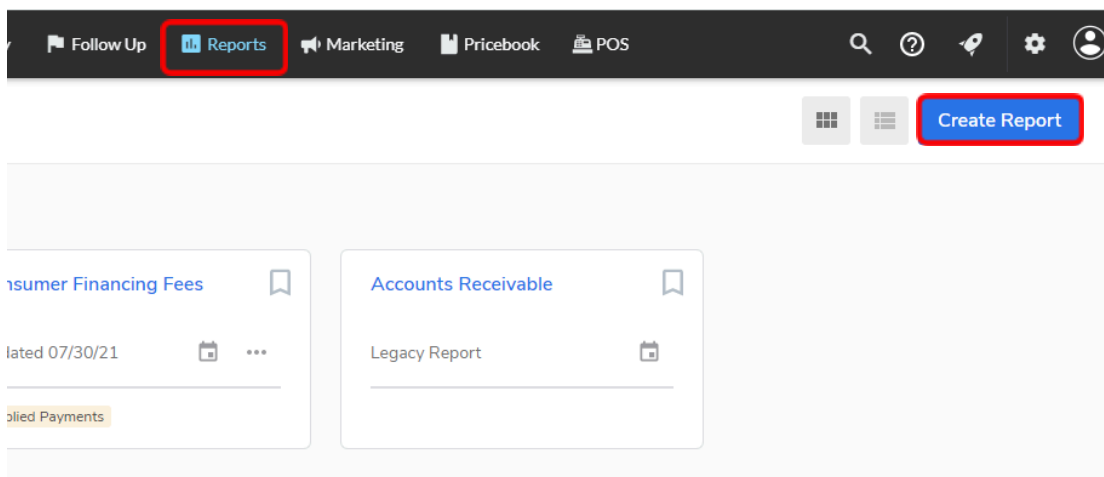
Position: Bookkeeper Manager: Owner

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Purpose: Establish Open Jobs Report in Service Titan to review all jobs in an incomplete status  
Frequency: One Time  
Process: Month-End Close

- Log into your ServiceTitan account
  - <https://go.servicetitan.com/>
- Navigate to Reports, Select Create Report (See **Figure 1**)

Figure 1



- From the report builder screen (See **Figure 2**)
  - Choose report type - select Jobs
  - Select a report template - Jobs
  - Select Deselect All
  - Select the following Columns to display
    - Job#
    - Job Type
    - Business Unit
    - Status
    - Jobs Total
    - Created Date
    - Last Appt Date
    - Appt Hold Reasons

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- Customer Name
- Select Next

Figure 2

The screenshot shows the 'Columns' configuration step in ServiceTitan. The 'Jobs' report type is selected. The 'Columns to be displayed in the report' section shows the following columns selected:

- Job #
- Job Type
- Business Unit
- Status

Other columns visible but not selected include Job ID, Job Class, Job Campaign ID, Call Campaign ID, Business Unit ID, Invoice ID, and Invoice #.

- Set Details (See [Figure 3](#))
  - Name: Open Jobs
  - Category: Operations
  - Description: Jobs in "incomplete" status - reviewed at minimum monthly to verify all billing is complete for the prior month
  - Select Sharing Options
  - Select Save

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Figure 3

Set Details

Name\*

Category\*

Description

Template: Jobs

Share Access

View Only

View and Edit

Share this report for view/edit with all other users whose permissions allow them to view/edit this type of report

Back

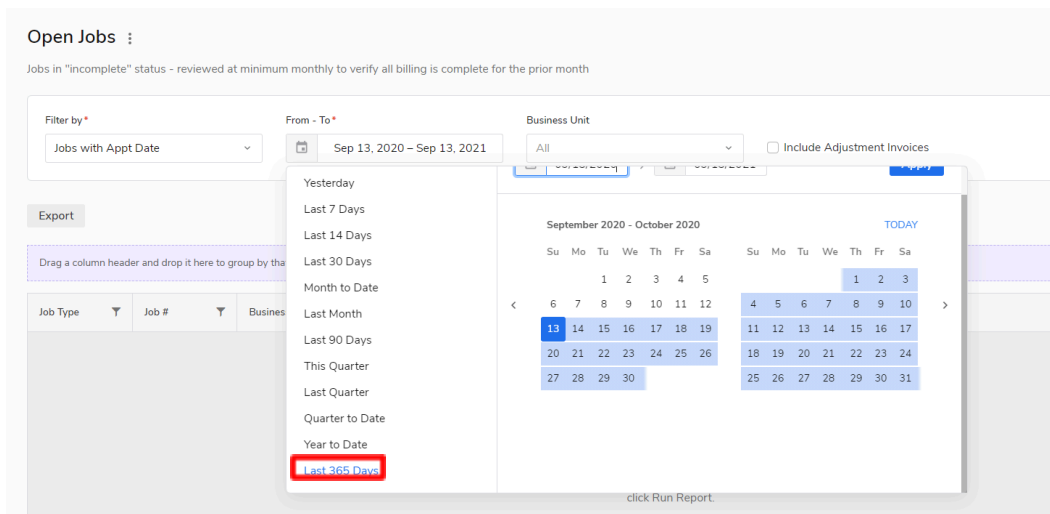
- In the Open Jobs Report (See [Figure 4](#))
  - o In the Filter By drop down select Jobs with Appt Date
  - o In the From – To box select Last 365 Days

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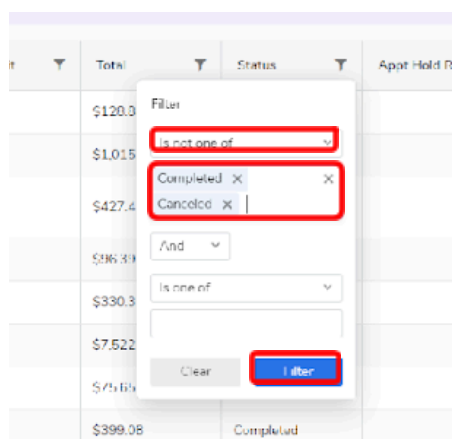
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Figure 4



- o Select the filter icon next to Status
- o Change filter to "Is not one of"
  - Add "Completed"
  - Add "Canceled"
- o Select Filter

Figure 5



- o Save Changes
- o Select Run Report (See [Figure 6](#))

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Figure 6

Customer Name	Job #	Job Type	Business Unit	Total	Status	Appt Hold Reasons
Shapiro Marty/ Jessica	7840027	No AC	Service	\$0.00	Hold	Waiting for manager
Tollefson, Heidi (3663023)	7677211	Equipment Install	Install	\$0.00	Hold	
Brown Phil/ Linda	7780507	No AC	Service	\$0.00	In Progress	
Rittz, Rachel (5804863)	7955099	Equipment Install	Install	\$0.00	In Progress	
Sharp Donald	7926555	No AC	Service	\$0.00	Scheduled	

- Select three dots next to report name, select Schedule (See Figure 7)

Figure 7

Open Jobs ⋮

- Edit
- Sharing
- Duplicate
- Schedule**
- Delete

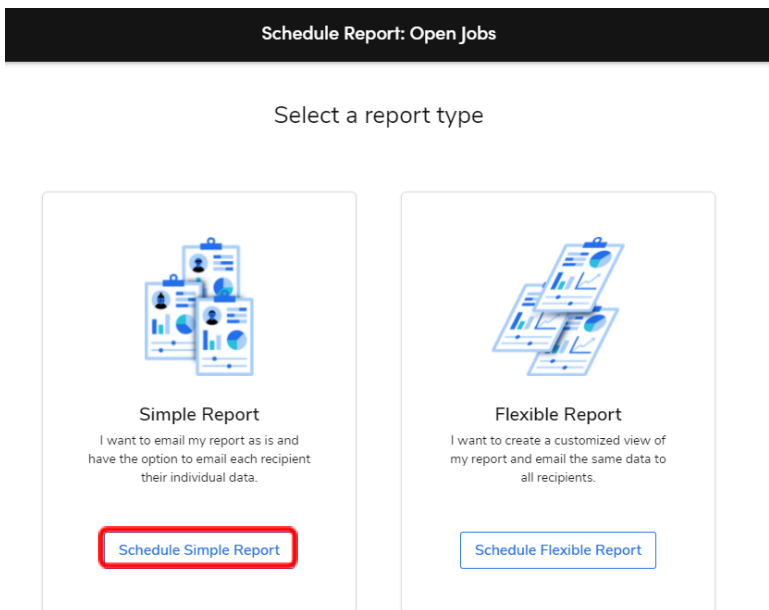
- Select Schedule Simple Report (See Figure 8)

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Figure 8



- Set the following options
  - Email Subject: Open Jobs Report
  - Attach Report as: XLSX
  - Date Range: Custom
  - Days: 365
  - Filter By: Jobs with Appt Date
  - Business Unit: All
    - Note: If you are sending this report to Department Managers you can select their business unit and send them the report for just their department, otherwise if this is going to accounting or the owner leave as all
  - Select Next (See [Figure 9](#))

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Figure 9

The screenshot shows a web interface titled "Schedule Report: Open Jobs" with a close button (X) in the top right. Below the title is a progress bar with three steps: 1. Details (active), 2. Recipients, and 3. Cadence. The "Add Details" section contains the following fields and options:

- Email Subject:** A text input field containing "Open Jobs Report".
- Date Range:** A dropdown menu set to "Custom".
- Attach report as:** Radio buttons for "PDF" (unchecked) and "XLSX" (checked). Below it is an unchecked option for "Export only aggregated data".
- Custom Range:** Two buttons, "Next" and "Previous", with "Previous" highlighted in blue. Below them is a text input field with "365" and the label "days", followed by an unchecked checkbox for "Include the send date".
- Filter by:** A dropdown menu set to "Jobs with Appt Date".
- Business Unit:** A dropdown menu set to "All".
- Include Adjustment Invoices:** An unchecked checkbox.

At the bottom right of the form are two buttons: "Back" (disabled) and "Next" (active).

- Enter employees to receive report in Select Recipients
  - o Select Next (see [Figure 10](#))

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Figure 10

1 Details 2 Recipients 3 Cadence

### Select Recipients

Add individuals or business units and teams to send the report to members within them.

Brittany Baimbridge

Clear all

I want recipients to see their own data only  
For example, John Smith will only see John Smith's data.

Back

Next



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- Select Report Cadence options (see [Figure 11](#))

Figure 11

Progress: ✓ Details ✓ Recipients 3 Cadence

Select Cadence  
Set up how frequently the report will be sent.

Send report every  month

at

on day  of the month  
[Add another day](#)

