Position: Book	keeper	Manage	er: 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
 - o <u>https://go.servicetitan.com/</u>
- Navigate to <u>Reports</u>, Select <u>Create Report</u> (See Figure 1)

Figure 1

r 🏴 Follow Up 🕕 Reports	📢 Marketing	Pricebook	👜 POS	(২	Ą	\$	3
						Create F	Report	J
1sumer Financing Fees	Accou	ints Receivable	Д					
lated 07/30/21	Legacy	Report						
plied Payments								

- From the report builder screen (See Figure 2)
 - o Choose report type select Jobs
 - o Select a report template Jobs
 - o Select <u>Deselect All</u>
 - o 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 <u>Next</u>

Figure 2

Report type	t type		Report template	3 Colum	d De	
Choose report type	Select a report template		Columns to be displayed in the report		Q Search columns	
All	Applied Payments	G	lobs @			
Technicians	Business Unit Performance	0				
Jobs	Calls	0	SELECTED COLUMNS: 7 Deselect All			
Business Units	Campaign Summary	0	 Recommended columns 			
Accounting	Customers	0	JOB BASICS			
Purchasing & Inventory	Inventory	0	OI dol		V dol #	
ob Costing & Payroll	Inventory Line Items	Ū	🗸 Јор Туре		Job Class	
Sales, Opportunities and Revenue	Jobs	0				
Marketing	Locations	(i)	Job Campaign		Job Campaign ID	
ead Generation	Office Performance	(i)	Call Campaign	٥	Call Campaign ID	
Memberships	Project Job Costing	0				
Customers	Recurring Service Events	0	Campaign Category	0	Business Unit ID	0
Calls	Technician Performance	0	Business Unit		Invoice ID	(j)
stimates	Timesheets	0				_
imesheets			U Invoice #		V Status	0
			Bausad	0	C. Summary	0

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





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Figure 3

Set Details	
Name*	
Open Jobs	
Category *	
Operations ~	
Description	
Jobs in "incomplete" status - reviewed at minimum monthly to verify all billing is complete for the prior month	
Template: Jobs	
Share Access	
View Only	
Search and add teammates ~	
View and Edit	
Search and add teammates ~	
Are this report for view/edit with all other users who permissions allow them to view/edit this type of report	se t

Back Save

- In the Open Jobs Report (See Figure 4)
 - *o* In the Filter By drop down select <u>Jobs with Appt Date</u>
 - *o* In the From To box select Last 365 Days





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Figure 4

Filter by*			From - To*	E	Busines	s Unit													
Jobs with Appt Date		~	Sep 13, 2020 - Sep 13, 20	021	All							~		nclud	le Adj	ustm	ent li	nvoic	es
			Yesterday	Ľ	- ·			_ ′		-								1.451	
Export			Last 7 Days Last 14 Days		Sep	tembe	er 20	20 - 04	tobe	r 202	0			Ŧ		TI	Т	ODAY	
Drag a column header and	drop it here to	group by th	a Last 30 Days		Su	Mo	Tu	We	Th	Fr	Sa	St	Mo	Tu	We	Th	Fr	Sa	
			Month to Date			_	1	2	3	4	5		_	-	_	1	2	3	
ob Type 🔻 Job	# 1	Busine	s Last Month	<	6		8	9	10	11	12	4	5	6	/	8	9	10	>
			Last 90 Days		13	14	15	16	1/	18	19	1:	12	13	14	15	16	1/	
			This Quarter		20	21	22	23	24	25	26	10	19	20	21	22	23	24	
			Last Quarter		27	28	29	30				2:	26	27	28	29	30	31	
			Quarter to Date																
			Year to Date																
			Last 365 Dave																

- 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

• •	Total	٣	Status	т	Appt Hold Re
	\$120.0	Filter			
	\$1,015	ls not one	of	-	
	\$427.4	Canceled	×	Ĵ	
	\$96.39	∧nd v	,		
	\$330.3	is one of		-	
	\$7,522			_	
	\$75.65	Clear		er	
	\$399.08		Completed		

- o___Select Save Changes
- o Select <u>Run Report</u> (See Figure 6)



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Position: Book	keeper	Manage	er: Owner	
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Figure 6

		nonthiy to verify all t	illing is complete for the p	prior month			
Filter by*		From - To*		Business Unit			
Jobs with Appt Date	Ý	Aug 12	2, 2020 – Aug 12, 2021	All		 Include Adjust 	tment Invoices Run Report
Export Drag a column header and	drop it here to group b	ny that column					Save Changes Edit C
Customer Name 🛛 🔻 🔻	Job # dol	Job Type	Business Unit 🛛 🔻	Total 🔻	Status 🕇 🛛 🏹	Appt Hold Reasons	т
	7840027	No AC	Service	\$0.00	Hold	Waiting for manager	
hapiro Marty/ Jessica							
hapiro Marty/ Jessica olleckson, Heidi 3663023)	7677211	Equipment Install	Install	\$0.00	Hold		
hapiro Marty/ Jessica olleckson, Heidi 3663023) rown Phil/ Linda	7677211 7780507	Equipment Install	Install	\$0.00 \$0.00	Hold In Progress		
Shapiro Marty/ Jessica Solleckson, Heidi 3663023) Irown Phil/ Linda ittz, Rachel (5804863)	7677211 7780507 7955099	Equipment Install No AC Equipment Install	Install Service Install	\$0.00 \$0.00 \$0.00	Hold In Progress In Progress		

• Select three <u>dots</u> next to report name, select Schedule (See Figure 7)

Figure 7

Open Jobs	:	
Jobs in incomplete	🖍 Edit	st monthly to veril
	🔒 Sharing	
Filter by*	Duplicate	From - To*
Jobs with Ap	🖬 Schedule	- A
	Delete	
Export		

• Select <u>Schedule Simple Report</u> (See Figure 8)





Position: Book	keeper	Manage	er: Owner	
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Figure 8



- Set the following options
 - o Email Subject: Open Jobs Report
 - o Attach Report as: XLSX
 - o Date Range: Custom
 - o Days: 365
 - o Filter By: Jobs with Appt Date
 - o Business Unit: All
 - Note: If you are sending this report to Department Mangers 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
 - o Select Next (See Figure 9)





Position: Book	keeper	Manage	er: Owner	
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Figure 9

S	Schedule Report: Open Jobs	×
1 Details	2 Recipients	3 Cadence
Add Details Enter information and select filters that will apply to the scheduled report.		
Email Subject Open Jobs Report	Date Range Custom ~	
Attach report as PDF XLSX Export only aggregated data	Custom Range Next Previous 365 days Include the send date	
	Filter by* Jobs with Appt Date ~	
	Business Unit	
	Include Adjustment Invoices	

Back Next

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





Clear all

Position:	Bookk	eeper		Manager:	Owner	
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Figure 10						

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Position: Boc	okkeeper	Manage	er: Owner	
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• Select Report Cadence options (see Figure 11)

Figure 11

🗸 Details	Recipients	3 Cadence
Select Cadence Set up how frequently the report will be sent.		
Send report every 1 month ~		
at 06:00 am 🗸		
on day 1 of the month		

Back Schedu





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Verification of Procedure Review

Employee Name	Signature	Date



