Creating Open Jobs Report in ServiceTitan

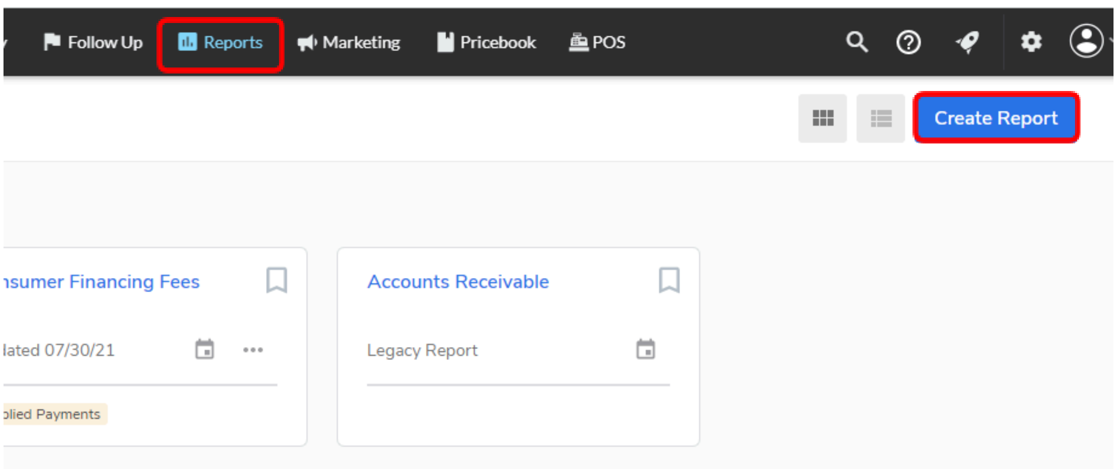
Position:	Bookkeeper	Manager:	Owner

Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	1

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**)

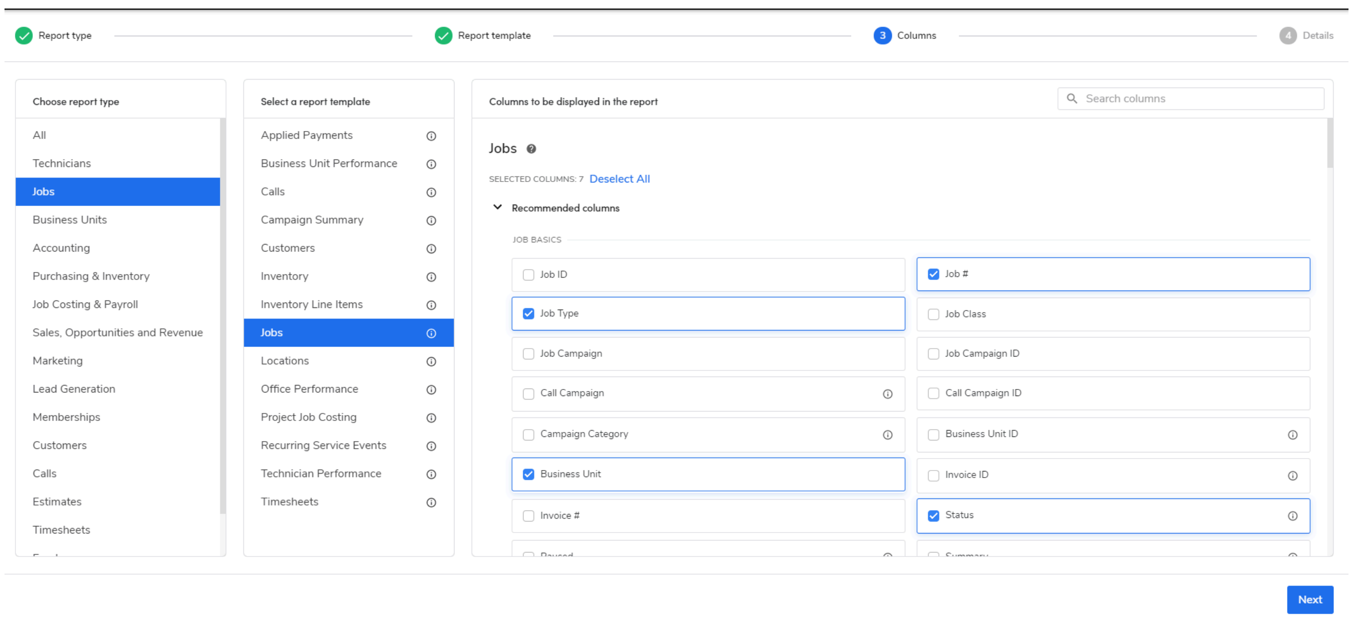
Figure 1



- 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

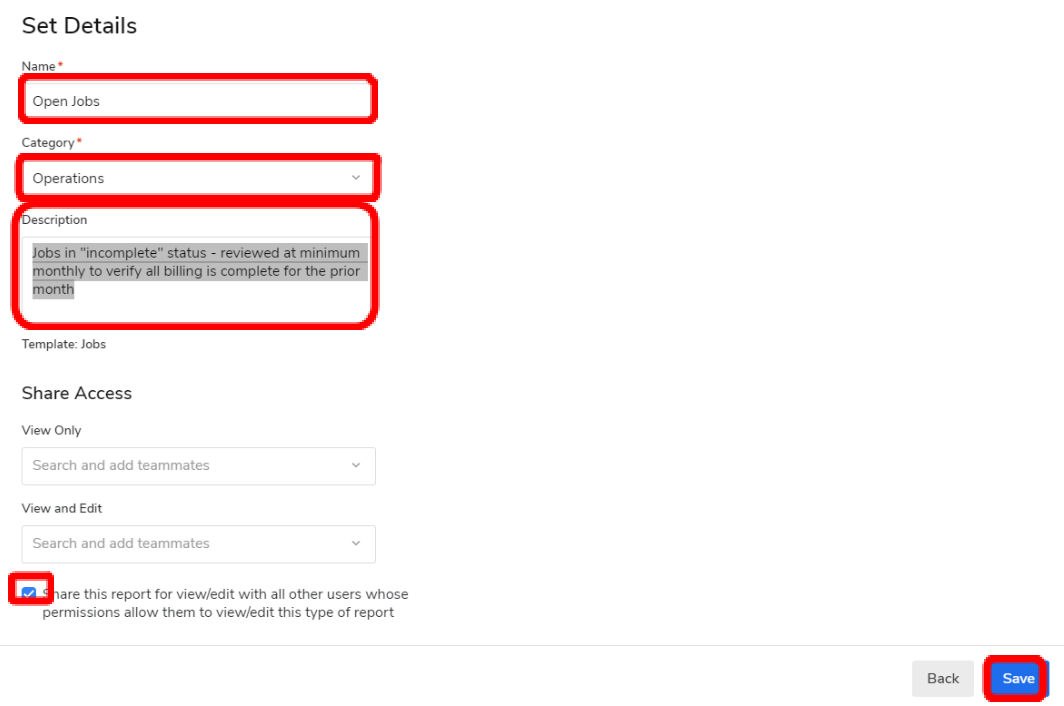
- Customer Name
- Select Next

Figure 2



- 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

Figure 3



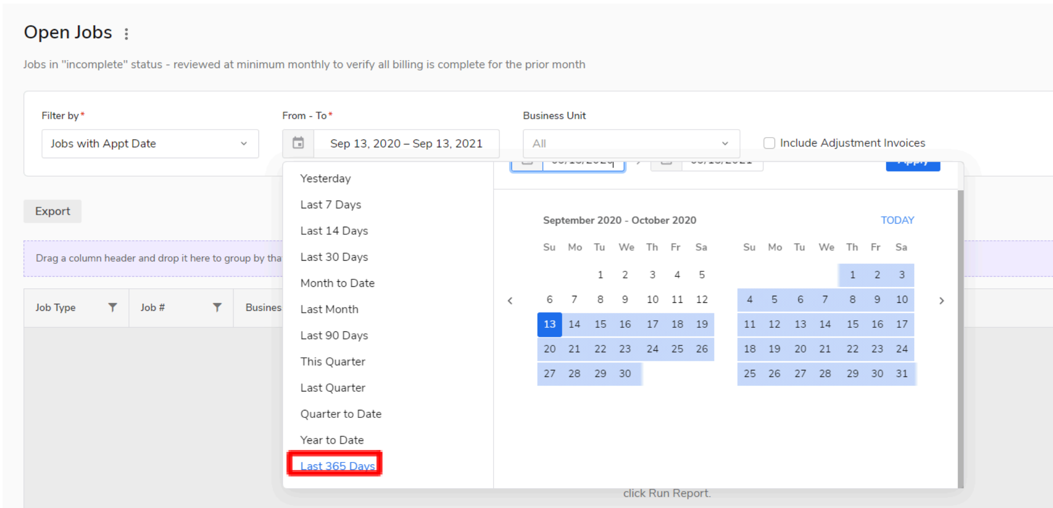
- In the Open Jobs Report (See **Figure 4)**
  - In the Filter By drop down select <u>Jobs with Appt Date</u>
  - In the From – To box select <u>Last 365 Days</u>

Pub# DM-HVAC-ALL-6-11457

Position:	Bookkeeper	Manager:	Owner

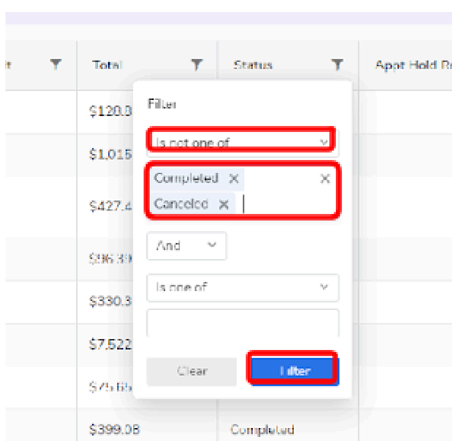
Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	4

Figure 4



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

Figure 5

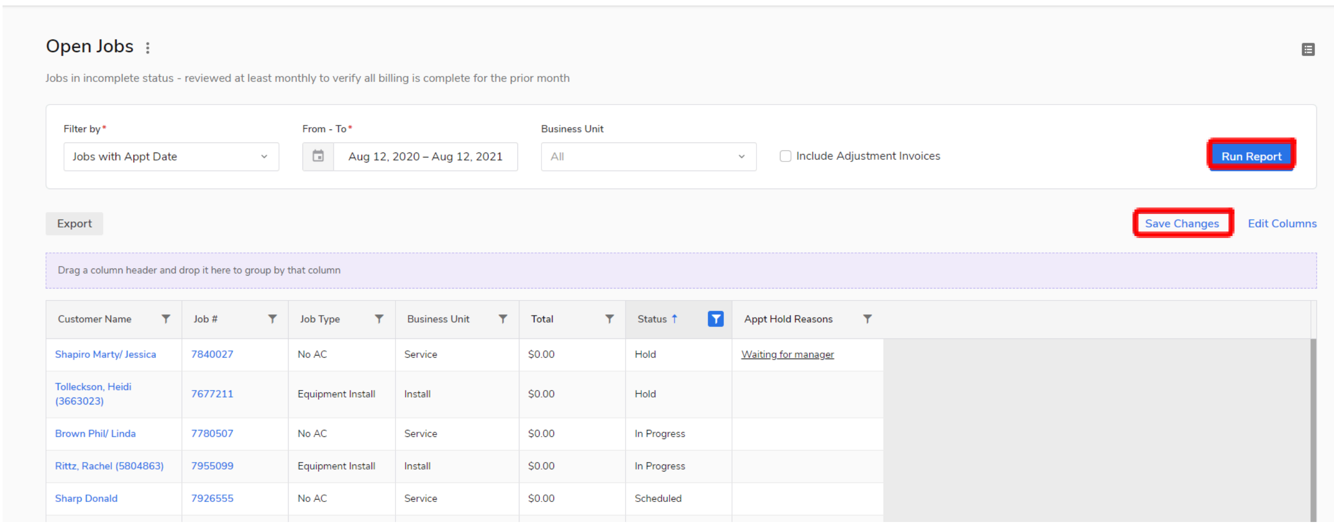


- Select Save Changes
- Select Run Report (See Figure 6)

Position:	Bookkeeper	Manager:	Owner

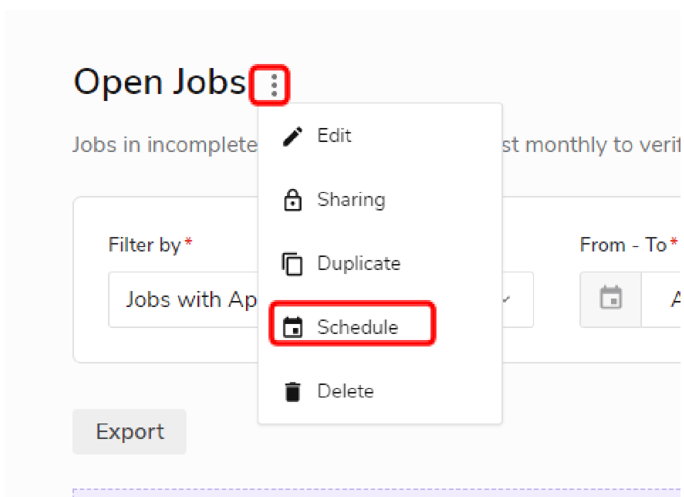
Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	5

Figure 6



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

Figure 7

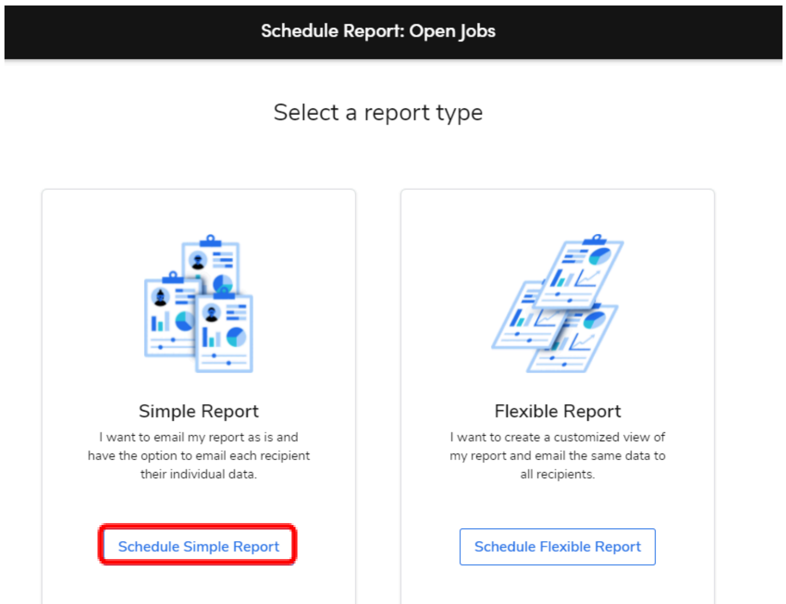


- Select Schedule Simple Report (See **Figure 8**)

Position:	Bookkeeper	Manager:	Owner

Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	6

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 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
    - Select Next (See **Figure 9**)

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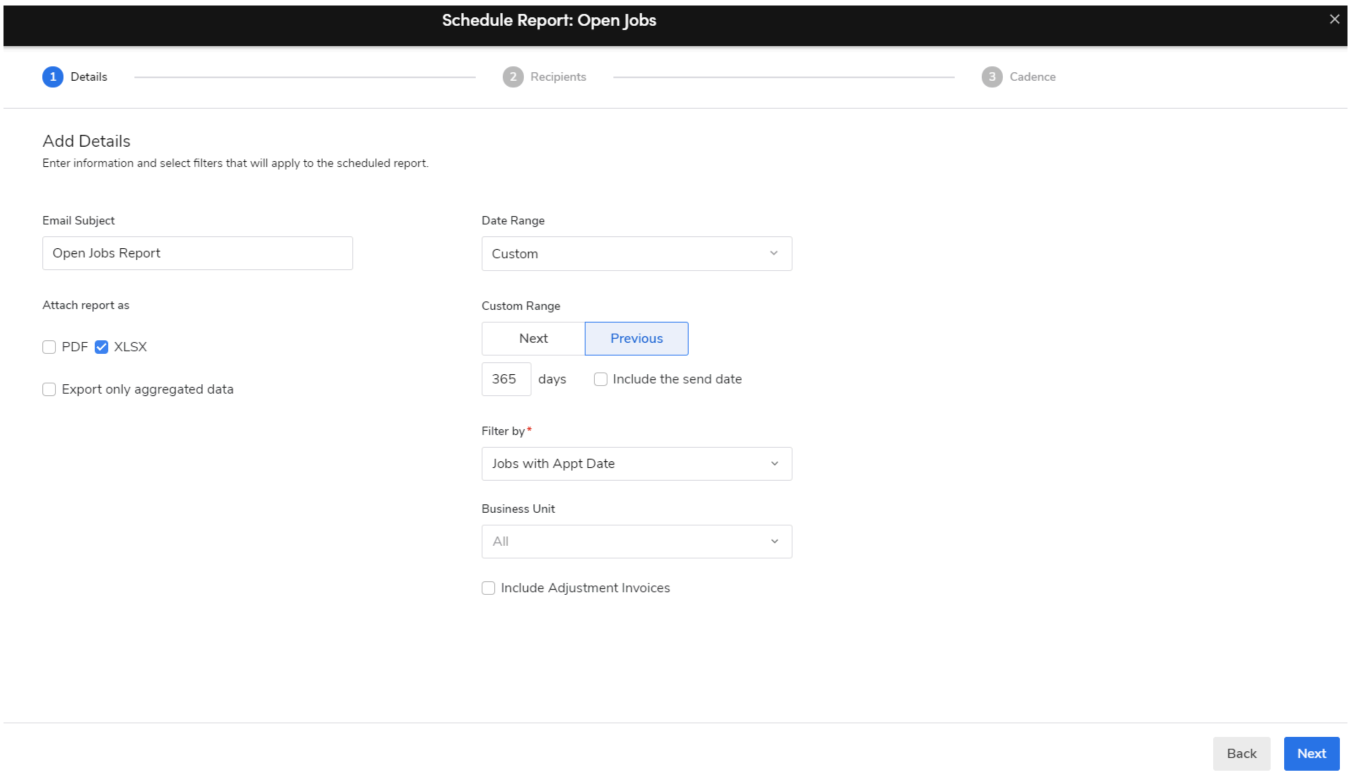
Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	7

Figure 9



- Enter employees to receive report in Select Recipients
  - Select <u>Next</u> (see **Figure 10**)

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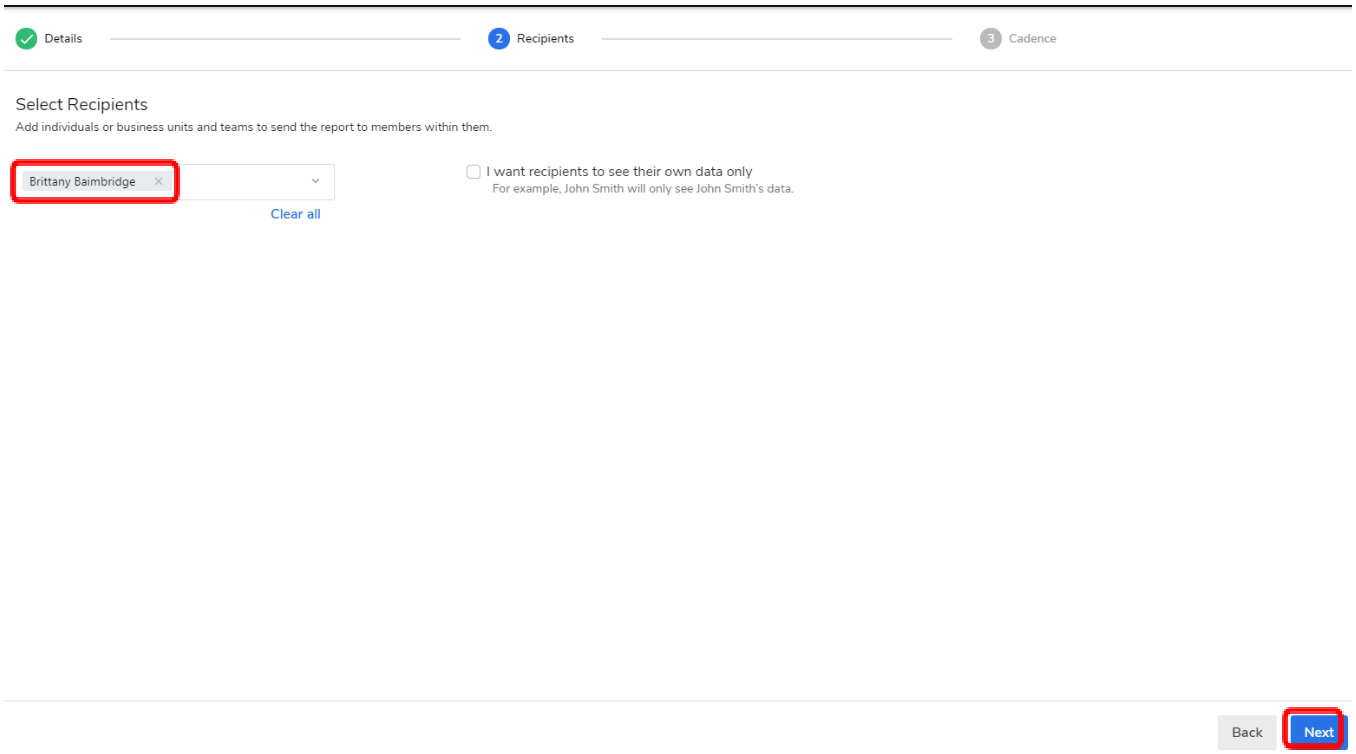
Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	8

Figure 10

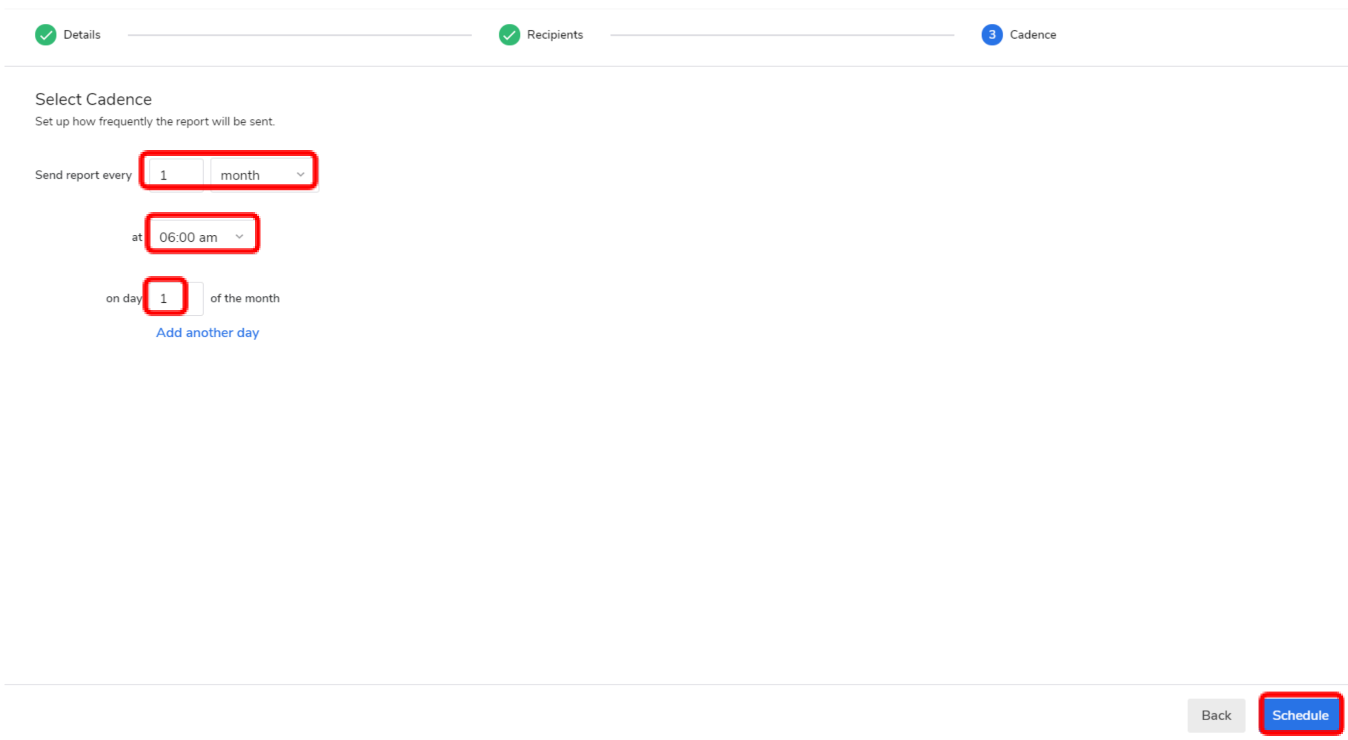


Position: Bookkeeper
Manager: Owner

Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	9

- Select Report Cadence options (see **Figure 11**)

Figure 11



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Position: Bookkeeper   Manager: Owner

Date Created	Last Update	Review Date	Department	Page #
August 12, 2021	December 3, 2024	12 Months from the last update	Accounting	10

Verification of Procedure Review

Employee Name	Signature	Date

Pub# DM-HVAC-ALL-6-11457