

Invoice Summary Generator

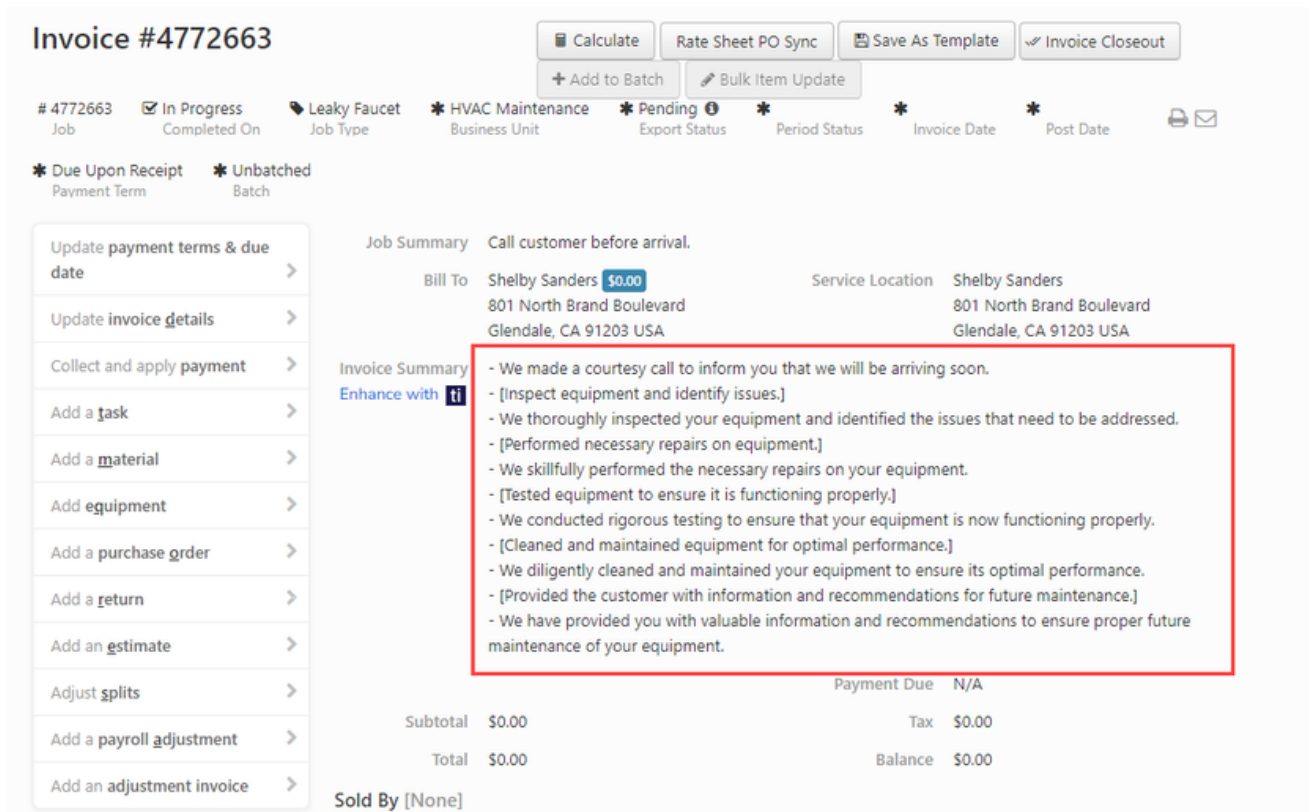
Titan Intelligence Automations

Get clear and detailed invoice summaries based on your original invoice and job summaries with just a few clicks. Generating invoice summaries using Titan Intelligence saves you time and enhances your customer communication. You can decide which invoice values to use and the overall structure of your invoice summaries.

To start sending professional invoice summaries with just a click, you'll need to set up your prompts, test until you're satisfied, and then change your settings.

To Get Started

1. Set up your Invoice Summary Prompts
2. Test until you're satisfied
3. Turn on Generative Invoice Summary



Invoice #4772663

Buttons: Calculate, Rate Sheet PO Sync, Save As Template, Invoice Closeout, Add to Batch, Bulk Item Update

Job: #4772663, In Progress, Completed On, Leaky Faucet, Job Type, HVAC Maintenance, Business Unit, Pending, Export Status, Period Status, Invoice Date, Post Date

Payment Term: Due Upon Receipt, Batch: Unbatched

Update payment terms & due date
Update invoice details
Collect and apply payment
Add a task
Add a material
Add equipment
Add a purchase order
Add a return
Add an estimate
Adjust splits
Add a payroll adjustment
Add an adjustment invoice

Job Summary Call customer before arrival.

Bill To Shelby Sanders \$0.00
801 North Brand Boulevard
Glendale, CA 91203 USA

Service Location Shelby Sanders
801 North Brand Boulevard
Glendale, CA 91203 USA

Invoice Summary
Enhance with **ti**

- We made a courtesy call to inform you that we will be arriving soon.
- [Inspect equipment and identify issues.]
- We thoroughly inspected your equipment and identified the issues that need to be addressed.
- [Performed necessary repairs on equipment.]
- We skillfully performed the necessary repairs on your equipment.
- [Tested equipment to ensure it is functioning properly.]
- We conducted rigorous testing to ensure that your equipment is now functioning properly.
- [Cleaned and maintained equipment for optimal performance.]
- We diligently cleaned and maintained your equipment to ensure its optimal performance.
- [Provided the customer with information and recommendations for future maintenance.]
- We have provided you with valuable information and recommendations to ensure proper future maintenance of your equipment.

Payment Due N/A

Subtotal	\$0.00	Tax	\$0.00
Total	\$0.00	Balance	\$0.00

Sold By [None]

Set Up Invoice Summary Prompts

What is a prompt?

Prompts are special instructions used by Titan Intelligence to create your invoice summary. With prompts, you can determine the tone and style of your summary, ensuring that your summary matches your company brand.

A few example prompts to try:

- Create a bulleted summary showing the work the technician provided
- Polish the description to convey professionalism
- Break into 3 sections: Invoice Description, Justification for Charges, Points of Urgency

Check out the [Knowledge Base article](#) for step-by-step instructions on how to set up in ServiceTitan.

Pro Tip: When testing your prompts, use a real example to see how your prompt will translate an invoice into a professional summary. In the Invoice Number search field, you'll simply enter an existing invoice number to test.

Test Summary Results Generate Test Summary

Note: This is a preview of the generated summary, no updates to the invoice will be made.

Installed a new Kohler Reach toilet and properly disposed of the old toilet for you. Additionally, we are pleased to inform you that we have sold you our gold membership package. This membership grants you several valuable benefits, including:

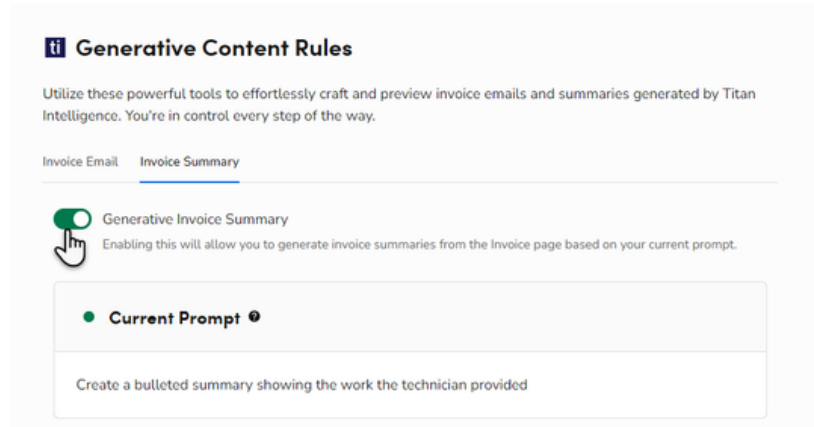
- Priority support: We will prioritize your service requests to ensure a prompt resolution.
- Same-day response time: You can expect our team to arrive on the same day you contact us for any future service needs.
- 15% discount on today's service call: As a token of appreciation for choosing us, you will receive a 15% discount on today's service.
- 15% discount on all future service calls: You will enjoy a recurring 15% discount on all future services we provide.
- Monthly newsletter program with expert tips: Stay informed with our monthly newsletter that offers valuable insights and tips from our experts.
- Summer system review: Our team will pay you a visit during the summer to conduct a thorough review of your systems.
- Winter system cleaning: We will also ensure that your systems are properly cleaned during the winter season.

We wanted to extend our gratitude for your business and hope that our services will continue to meet and exceed your expectations.

Turn on Generative Invoice Summary

Turning on this feature is as simple as a toggle.

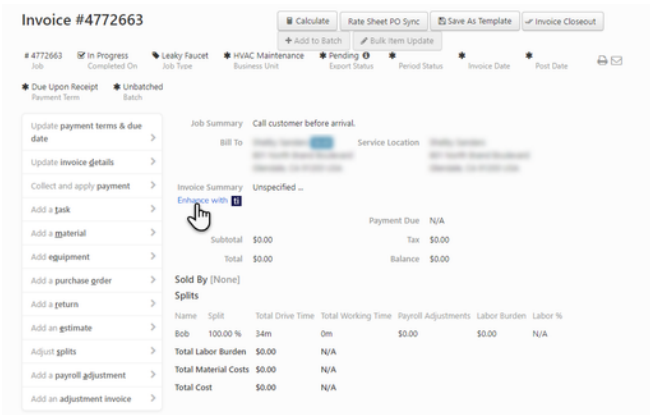
1. Go to the navigation bar and click **Settings**
2. In the side panel, click **Invoicing > Generative Content Rules**
3. On the Generative Content Rules screen >> click the **Invoice Summary** tab
4. Toggle the Generative Invoice Summary setting to enable this feature



Generate Your First Invoice Summary with Titan Intelligence

After setting up your prompts, you're ready to create professional invoice summaries with just a few clicks.

1. Navigate to the invoice screen and click **Enhance with TI**.
2. Choose *Generate Summary* in the dialog box that opens
3. Review and save - your professional Invoice Summary will auto-populate and appear on the invoice



To take the next step and automatically generate invoice emails using Titan Intelligence, check out [this Knowledge Base article](#) for step-by-step instructions.