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ServiceTitan

# ServiceTitan Project Tracking Setup & Training Checklist

| Resources | Links |
|---|---|
| Construction Landing Page | Knowledge Base |
| Project Tracking Basics | Academy (Self-Paced) |
| Progress Billing with Application for Payment | Academy (Self-Paced) |
| Project Tracking Overview with Product Manager | Zoom Link Password: 0#58%sj7 |
| ServiceTitan Professional Partner Hub | Interested in a coach/consultant? Get more information here |

| Complete | Recommended Setup and Training Task(s) |
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| | **GETTING STARTED WITH PROJECT TRACKING**<br>**Review and access key resources to start exploring the feature set and how to configure it to your business needs.**<br>Below please find a suggested checklist to get started and to manage the implementation of Project Tracking effectively in your business.<br>☐ Review the end-to-end Overview (see resources above)<br>☐ Determine who will be your Project Tracking "Champion" - it could be you!<br>☐ Identify your primary stakeholder(s) and get them involved in this process, example stakeholders could be Project Managers / Coordinators,<br>☐ Gather Materials and Documents that will allow you to evaluate your Project Tracking needs and setup requirements. These may include:<br>    ☐ Recent Invoices (Progressive, Final)<br>    ☐ Recent examples of completed Schedule of Values / Continuation Sheet (if applicable)<br>    ☐ WIP (Work in Progress) Reports<br>    ☐ Workflow maps or diagrams, Standard Operating Procedures (SOPs) |
| ☐ | **TRAINING STEP 1 – LIVE WEBINAR**<br>**Attend/Watch the Project Tracking Training Series (REQUIRED)**<br>See training links for which users should be attending each workshop.<br>☐ Live: Project Tracking Setup Recording: Project Tracking Setup (#1)<br>☐ Live: Project Tracking Workflows Recording: Project Tracking Workflows (#2) |
| ☐ | **TRAINING STEP 2 – BASICS**<br>**Assign Self-Paced Academy Courses to your Project Teams - quick tip here**<br>☐ **Project Tracking Basics**<br>☐ **Progress Billing with Application for Payment**<br>☐ **Dispatching and Managing Crews** |
| ☐ | **TRAINING STEP 3 – EVALUATE YOUR NEW WORKFLOW(S)**<br>Determine which Workflow is best for your business using these courses as your guide to matching existing or preferred workflow(s). Best practices for setup and use are included.<br>☐ Core Project Tracking (part of Project Tracking Basics)<br>☐ Cost Code Project Tracking<br>☐ Phased Project Tracking<br>**Are you looking for a coach or consultant to assist you with the configuration, change management, implementation, and continued success of this feature-set across your organization? ServiceTitan Certified Partners are available to support you! Learn more here.* |

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| ☐ | **SETUP STEP 1 – UPDATE EXISTING SETTINGS**<br>**Review and update your existing ServiceTitan Settings and Configurations to make sure you're ready for Project Tracking**<br>The following setting changes include recommended best practices for operational efficiency and accurate costing, setting up your account for successful Project Tracking in ServiceTitan.<br><br>***Business Units & Reporting Settings***<br>By creating or confirming your Business Units, Trade, and Divisions, this ensures your reporting and accounting setup will support your project work.<br>☐ Separate business unit(s) set up for construction (Or commercial etc) KB Article<br>☐ Separate trade(s)/division(s) set up for construction (Or commercial etc)<br><br>***Technicians***<br>☐ **Settings >Technicians:**<br>☐ Hourly pay rates added* and confirmed<br>Please note that if hourly pay and/or burden rates are not updated, you will not be able to track real-time labor costs. Maintaining your pay rates ensures accuracy of costs.<br>☐ Burden Rates added KB Article<br>☐ Project Labels applied based on the type of labor performed (this is for the timesheets to have labels for the actuals on budget vs actual tables).<br>***Job Types***<br>☐ **Create Job types** set up for each project phase and/or trade (Highly recommended), examples include but not limited to:<br>☐ Proposal / Estimate (If you conduct a walkthrough or initial visit)<br>☐ Rough In<br>☐ Trim Out<br>☐ Startup<br>☐ (Any way you phase out your work)<br>☐ Project labels assigned to each job type (Optional)<br><br>***Project Statuses***<br>☐ **Settings > Project Statuses** KB Article Default statuses but can customize sub-statuses<br>☐ Consider if stakeholders / team members need to be alerted when statuses change<br>☐ **Settings Status Alerts > Con**<br><br>***Invoicing / Email Templates***<br>☐ **Email > Application for Payment** tab. (Used if emailing to customer)<br><br>***Task Management***<br>☐ **Task Sources** - Add project-related sources such as General Contractor or Project Team<br>☐ **Task Types -** Review your types to include support Project Management tasks / to-dos across your teams KB Article<br>☐ **Task Resolutions** - Ensure the resolutions support the needs for Project Teams<br><br>**OPTIONAL:**<br>**Settings > Purchasing/Inventory > Configuration > Display Services on Invoice Closeout** Evaluate if you would like Services to be available to progress bill using the Invoice Closeout functionality (Job or Project invoices). |

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| | Invoice Closeout is typically used in conjunction with Requisition and Inventory Management functionality. Discuss this option with your ServiceTitan representative or your ServiceTitan Certified Provider* to ensure this tool will support your billing needs.<br><br>**Are you looking for a coach or consultant to assist you with the configuration, change management, implementation, and continued success of this feature-set across your organization? ServiceTitan Certified Partners are available to support you! Learn more here.* |
| ☐ | **SETUP STEP 2 – UPDATE NEW SETTINGS**<br>**Configure New Settings Update > Project Settings**<br>With the activation of Project Tracking, new features and settings are activated in your ServiceTitan Account. Default settings are configured for you, but you are required to set it to your preferences to meet your business needs.<br>**Project Settings: KB Article**<br>☐ **Create Project Labels** KB Article<br>☐ **Default Preferences**: Set a default label for the different types. (Note if the PB item has a label already, then the labels used as default will not be added).<br>☐ **Project Setup**: *Percentage of Completion (POC) Method* is our recommended default. The Work In Progress report is based on POC revenue recognition.<br>☐ **Retainage:** (*Optional for those that use it*) KB Article<br>Create a project label for retainage that will help with reporting later.<br>☐ **Project Business Unit:** (Optional) Decide if you want to pre-set BUs on project level<br>**Project Types: KB Article**<br>Default Project Types: Project Types enable you to modify the layout of your project records while making it easier to find projects in your account.<br>☐ Example: Hide or show the BvA table on certain project types<br>☐ Reporting now lets you filter by Project Types and/or Project Statuses<br><br>**Application for Payment**<br>☐ **Settings > Application For Payment**-(it is required to setup retainage even if you do not use retainage on your applications for payment) KB Article<br><br>**Costing**: Default is Committed Cost & Actual Costs KB Article<br><br>**Feature Gates to Consider (Support/CSM can enable)**<br>☐ Committed Costs in Job Costing (ST-69.1) (Support can Enable)<br>☐ Budget vs Actual General Ledger View (ST-69.1) (Support can enable)<br>☐ Setting > (Accounting) Payroll GL Mapping KB Article |

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| ☐ | **SETUP STEP 3 - Prepare your Pricebook for Project Estimating & Billing**<br>**Pricebook Setup:** (Recommendations) [KB Article]<br>*Consult your Accounting/Billing Team to reduce integration errors & billing issues.*<br>☐ Service created for customer billing<br>☐ Service created for each type of labor offered (check off labor service checkbox)<br>☐ Average cost for labor included in Estimated Labor Cost field<br>☐ Apply labor labels to each type of labor (Default added via project setting > default preference)<br>☐ Apply material labels to each material that will be used in projects (Default added via project setting > default preference)<br>☐ Apply equipment labels to each equipment that will be used in projects (Default added via project setting > default preference) |
| ☑ | **SETUP STEP 4 - Build & Personalize Views to Access & Analyze Projects**<br>**Portfolio, Reports & Dashboards built to support your Project Reporting Needs**<br>☐ **[Project Portfolio] Default View:** Set your user-specific default view to quickly access your priority projects [KB Article]<br>☐ **[Work In Progress Report]:** Use the Work in Progress (WIP) report to calculate the correct amount of recognized revenue for projects based on the Percentage of Completion method [KB Article].<br>☐ **New Report Template: ;Project Costing Dataset** - As costing and revenue are more likely to be at a 'Project' level with Project Tracking, you may need to access and/or build reports to support your reporting needs.<br>☐ **New Dashboard: Construction / Commercial Dashboard** Once it's in your account, you will be able to view a pre-built Dashboard based on Project-level datasets. |
| ☐ | **SETUP STEP 5 - GRANT/RESTRICT ACCESS BY USER ROLE**<br>**Role Permissions to ensure proper access to tools and potentially sensitive data**<br>☐ **Project Permissions**<br>    ☐ Attach job to project<br>    ☐ Detach job from project<br>    ☐ Delete project and location opportunities and estimates<br>    ☐ Edit business unit on project<br>    ☐ Show financials - This permission will (1) hide the Financials section (Budget vs Actuals) of each Project and (2) prevent the download of the BvA table.<br>    ☐ View Project Portfolio<br>    ☐ Edit project type on project ([KB]) - *recommended to restrict to Project Managers and Administrators*<br>    ☐ Override project type settings on project ([KB])<br>☐ **View labor costing details** - This permission will allow employees to view labor details such as labor pay, labor burden, performance pay & payroll adjustments.<br>☐ **[Reporting Permissions] (Templates)**<br>    ☐ **WIP Project Report**<br>☐ **Construction/Commercial Dashboard** > Share Access |