



**ServiceTitan®**

Release Notes

ST-54

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## About this release

As summer winds down, new features and improvements in ServiceTitan are here to help you prepare for the change in seasons! New prebuilt and custom dashboards offer real-time insights that are relevant to your business. A simple keystroke opens Quick Navigation so you can find what you're looking for. Plus, Configurable Payroll is here to help you tailor your performance payroll, new enhancements for streamlining your inventory workflow are launching, and much more! Read on for more, watch the latest [Release Notes Overview](#) on YouTube, visit the Academy to enroll in the [ST-54 Release Notes Training course](#), or watch the [ST-54 Training Webinar](#).

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## NEW

### Dashboard and scorecards

- ★ **New custom dashboards:** The newly-designed custom dashboards provide several options for viewing your business metrics on the dashboard. Prebuilt dashboards and modules, as well as new customization options, give you the insights you need, at every ServiceTitan package level:
  - **Starter package**—Select from a library of pre-built dashboards that focus on different industries and company roles. This lets employees use the dashboard that's most relevant to their workflow.
  - **Essentials package**—Includes the Starter package features, *plus* you can create your own custom dashboards using prebuilt modules. With a drag-and-drop interface, you can customize the arrangement of your dashboards, set filters, and share dashboards with the rest of your team.
  - **Works package**—Includes the Essentials package features, *plus* the new module editor gives you the ability to build customized dashboard modules based on any of the dozens of ServiceTitan report templates. You can select which key performance indicators (KPIs) to report on, add charts and graphs, and set how you want modules to display.

For more on this feature, see [Create and edit custom dashboards](#) and enroll in the [Custom Dashboard Academy](#) course.

### Payroll and timesheets

- ★ **Configurable Payroll:** Configurable Payroll allows you to create unique performance-based pay structures to help automate technician incentive pay. You assign technicians customizable *pay profiles* to determine their commission and bonus pay. Pay profiles use job filters and precise pay calculations based on invoice subtotal, business unit, invoice item, sliding scales, and more for added flexibility. You can assign separate pay profiles to each type of technician you employ.

**Note:** This feature is available in the ServiceTitan Works package. For more on this feature, see [Configurable Payroll](#) and enroll in the [Configurable Payroll](#) Academy course.

## Search

- ★ **Quick Navigation:** Get to the page you want with fewer clicks. Pressing forward slash (/) on your keyboard opens *Quick Navigation*, which allows you to search for and navigate to pages such as *Forms*, *Permissions*, and the *Content Portal*. *Quick Navigation* is disabled when a text field is selected, so you can use forward slash as usual when entering text. For more on this feature, read [Quick Navigation](#) and enroll in the [Quick Navigation Academy](#) course.

## IMPROVEMENTS

### Accounting

- ★ **Track emailed statements:** You can now track your emailed statements in one place. Run the Office Audit Trail report to find a record of all your emailed statements. Tracking statements that are already emailed to customers prevents you from sending statements to the same customer twice and helps you track customers that haven't received an emailed statement. For more on this feature, see [Office Audit Trail report template](#).
- ★ **Add a BCC recipient in email templates:** You can now add a BCC recipient for email templates for invoices, estimates, forms, project invoices, work orders, and statements. This lets you copy emails to another team member for their review to give visibility into customer communications. BCC addresses are visible as hard-coded email addresses on individual emailing screens but are not visible to customers.  
**Note:** Emails sent by technicians in ServiceTitan Mobile are also sent to BCC address. For more on this feature, see [Customize email templates](#).
- ★ **Automatically create payment terms in QuickBooks Desktop:** If a ServiceTitan payment term is not in QuickBooks, you no longer need to manually create the payment term in QuickBooks. ServiceTitan automatically creates them when you export transactions.  
**Note:** If you have a payment term that includes an early payment discount or date requirement, you can update the newly created term in QuickBooks. For more on this feature, see [Export to QuickBooks Desktop from ServiceTitan](#).
- ★ **QuickBooks connection message:** To mitigate connection-related export errors, ServiceTitan now attempts to reconnect to your QuickBooks file and resume exporting. If this occurs, a message appears in the batch feed letting you know that we are working on reconnecting. This prevents you from having to click **Export to QuickBooks** if the connection to QuickBooks is ever disrupted. For more on QuickBooks, see [Export to QuickBooks Desktop from ServiceTitan](#).

- ★ **Dependent errors:** You can now exclude or include dependent entity errors from the Export Error Report to tailor the report to your needs. For more on this feature, see [Export Error Report](#).

## Dashboard and scorecards

- ★ **New Modular Dashboard settings:** The Modular Dashboard settings section lets you:
  - Manage viewing permissions for dashboard modules
  - Exclude inactive marketing campaigns and divisions from scorecards
  - Exclude inactive business units from the business unit filter
  - Include adjustment invoices in technician scorecard revenue calculations
  - Include all invoice items when calculating billable efficiency

This gives you more control over sensitive business metrics. For more on this feature, see [Manage Modular Dashboard settings](#).

- ★ **Automatic upgrade of legacy custom dashboards:** If you have existing custom dashboards, they are automatically upgraded to the new Custom Dashboards version. Your legacy dashboard settings are retained but you also gain the new functionality included with Custom Dashboards. For more on this feature, see [Create and edit custom dashboards](#).

## Inventory

- ★ **Download and import inventory spreadsheet for transfers:** When creating a transfer, you can now download an XLS spreadsheet template and enter all the items you want to transfer, and import it back to ServiceTitan to send it to your inventory locations. This helps you quickly create and send large transfers to many different inventory locations. For more on this feature, see [Create and edit transfers](#).
- ★ **Bulk update replenishment sources for inventory locations:** When replenishing inventory, you can now bulk edit your replenishment source. Instead of having to manually update each item, you can now quickly update multiple sources at the same time. For more on this feature, see [Bulk update replenishment source](#).
- ★ **Batch number added to reporting:** When running a purchasing or inventory report, the batch number column is now available. This helps you find the status of a transaction if it hasn't been exported yet. For more information, see [Invoices report template](#).
- ★ **Replenishment requests removed after an item is deactivated:** When an item is deactivated, the replenishment request for that item is automatically removed. You no longer have to manually go back and deactivate items from your replenishment records. Additionally, this saves you from accidentally ordering an item you no longer need. For more on this feature, see [Replenish items with purchase orders](#).

- ★ **Bulk assign templates to inventory locations:** When creating a template, use the new field, *Assigned Inventory Location* to bulk assign template to inventory locations. This reduces time spent by assigning inventory templates to many different locations at once. For more on this feature, see [Assign templates to locations in bulk](#).
- ★ **Tag items as *Serialized* or *Inventory* or *Tracked*:** On the *Purchase Order*, *Receipts*, and *Returns* screens, items are now automatically tagged as *Serialized* or *Tracked*. This allows you to quickly see what items are being tracked as inventory or serialized inventory. This helps you see if you have enabled tracking and what kind of tracking you have enabled for your items. For more information, see [Add inventory equipment, materials, and tasks to an invoice](#).
- ★ **Items added to a PO are automatically added to an invoice:** When you add an item to a PO and the PO is fully received, items can be added to an invoice with a \$0 cost. Additionally, if an invoice is in the *Pending* status and you click **Save** when receiving the PO, you can add the inventory items on the purchase order to the invoice. This saves you time by automatically adding items instead of having to manually add them to invoices.  
**Note:** The items are added at \$0 to prevent double job costing. For more information, see [Add inventory equipment, materials, and tasks to an invoice](#).

## Job Booking / Contact Experience

- ★ **Turn the Recall/Warranty/Leads feature on:** Now the Recall/Warranty/Leads feature is default turned on in **Settings > Operations > Booking Jobs**. This feature allows you to link Recalls, Warranties, and Leads directly from the *Calls* page. You have the option to turn it off in *Settings* at any time. For more on this feature, see [Set recall, warranty, and lead job booking guides](#).
- ★ **Global job type mapping:** You can now map your customized job types with ServiceTitan standard job types with the Global Job type mapping feature. Global Job type mapping is currently used in the [Google Local Service Ads \(GLSA\) integration](#) and will soon be available for additional integrations and to streamline the job creation process. For more on this feature, see [Global job type mapping](#).

## Marketing Pro

### Reputation

- ★ **Resending surveys:** You can now resend a survey request to customers for the jobs that did not generate a review. This helps you achieve a higher level of review generation rate. For more on this feature, see [Marketing Pro Reputation Management: Create email surveys](#) and [Create SMS surveys](#).

- ★ **Sending different logos to different locations:** You can now attach and send specific logos to specific locations. This helps to manage the different brands that your business has. For more on this feature, see [Marketing Pro Reputation Management: Create email surveys](#), [Create SMS surveys](#), and [Get started with Reputation Management](#).
- ★ **Enhanced audience building filters:** In the *Segment* step of the survey configuration, when building an audience for your survey, you can now target specific audiences by using multiple filters such as *Customer Types*, *Job Types*, and more. Additionally, you can view the reach count of the audiences, after the survey is applied to your current database. This helps you reconsider changing the filters in case the targeted number is too narrow. For more on this feature, see [Marketing Pro Reputation Management: Create email surveys](#) and [Create SMS surveys](#).

## Memberships

- ★ **Enhancements to recurring service invoice templates:** If your account is configured to view recurring service invoice templates for 2+ years and you add new tasks from a membership add-on to the 1st year template, it is now automatically added to the 2+ year template. This ensures that the customer gets the same pricebook items on recurring service invoice templates in year two and beyond that they receive in year one. For more information, see [Create new sales and renewal tasks](#).
- ★ **View edits on a customer's membership and recurring services:** On a customer's membership record, there is now an option to click **View Audit Trail**. This lets you quickly view an audit trail of all the edits to the membership and a membership's recurring services. This makes it easier for you to identify which employee has edited a membership and to resolve customer issues. For more information, see [Edit customer memberships](#) and [Manage recurring services](#).
- ★ **Initial Deferred Revenue added to Customer Membership template:** When creating a report using the Customer Memberships template, the new key performance indicator (KPI), *Initial Deferred Revenue* is available. This helps you see the initial deferred revenue amount entered when creating the customer membership. For more information, see [Customer Memberships report template](#).

## Mobile

- ★ **Smart Recommendations available for Pricebook Pro services added to an estimate or invoice:** When you add a service to an estimate or invoice, the *Recommendations* section provides *Smart Recommendations*, which are generated by an algorithm that suggests the services that are most commonly sold across the industry with that job. For more on invoices and estimates, see [Invoice walkthrough](#) and [Basic estimate workflows in ServiceTitan](#).

- ★ **Enhancements added to media viewing experience for pricebook items:** When adding pricebook items to invoices and estimates in ServiceTitan Mobile, the media viewer has been improved to show thumbnail previews of an item's images, PDFs, and videos. You can also click a thumbnail preview to view an item in enlarged mode and play videos in a media player. For more information, see [Add images, PDFs, and video to your pricebook](#).

## Payments

- ★ **Collect payments for customer statements:** When you select **Receive Payment** for a customer from the *AR Management* screen, on the *Collect and Apply Payments* screen, the payment amount prefills with the total balance due. The field is editable if you want to receive partial payment. This makes payment collection more efficient and accurate. For more on this feature, see [Collect a payment](#) and enroll in the [Payment Collections Academy](#) course.
- ★ **Display payments on sold estimates:** Payments on sold estimates linked to a project are now included in the *Payments* total of the *Project Summary* and the *Payments* section of the project record. This provides a more accurate account of payments received on a project. For more on this feature, see [Understand project records](#).
- ★ **Enhanced auto-apply payment rules:** In your *Payment Collections* settings, the improved layout makes it easier to read and edit your payment auto-apply rules. For more on this feature, see [Set up auto apply rules for payments](#) and enroll in the [Payment Collections Academy](#) course.

## Pricebook

- ★ **Video enhancements added to pricebook services:** The following changes are available in Pricebook to help manage video content:
  - Add and delete videos from the *Services Details* tab. For more on this feature, see [Add services to your pricebook](#).
  - Upload videos on the inline *Edit Media* popup. For more information, see [Add images and video to your pricebook](#).
  - View videos in mobile preview on the *Services* screen and *Services Details* tab. For more on this feature, see [Review mobile versions of pricebook items](#).
- ★ **PDF and MP4 support for services and equipment:** In your pricebook, you now have the ability to add PDFs and MP4 video files to equipment and service items. For more on this feature, see [Add images, PDFs, and video to your pricebook](#).
- ★ **Set a default image for your pricebook items:** When adding or editing media, set a default main image for pricebook items that shows wherever that pricebook item appears. For more on this feature, see [Add images and video to your pricebook](#).



- ★ **Pricebook item codes cannot exceed 31 characters:** Limit item codes to 31 characters to avoid long codes that are hard for technicians to view in ServiceTitan Mobile. In addition, when exporting to your accounting software, codes may be truncated, which can cause duplication errors.  
**Note:** The following improvement will be available soon after the release of ST-54: The 31-character limit does not apply if the item code includes a colon (:). This is to accommodate nested item categories in QuickBooks. For more on this feature, see [Add materials to your pricebook](#), [Add services to your pricebook](#), and [Add equipment to your pricebook](#).
- ★ **Fix duplicate item codes:** A message banner displays at the top of pricebook screens if duplicate pricebook items codes are detected now that we do not allow codes to be reused. Click **Fix** on the banner to update codes on a separate *Fix Duplicate Codes* screen—either manually or using auto-fix. For more on this feature, see [Edit pricebook items](#).
- ★ **Add recommendations to categories:** You can now recommend service items for items within a pricebook category. When a technician adds an item within the category to an estimate or invoice, the recommendations display in a pop-up in ServiceTitan Mobile. If your pricebook previously included suggested tasks, these are now managed through default recommendations.  
**Note:** This feature is an off-cycle release and will be available soon after the release of ST-54. For more on this feature, see [Edit additional category details](#).

## Pricebook Pro

- ★ **Pricebook Pro PDF assets:** Explainer PDFs for 16 HVAC services have been added to Pricebook Pro assets. You can access them by selecting the Pricebook Pro service in ServiceTitan Mobile and tapping the attached explainer to open the PDF viewer. You can show the PDF to customers so they can learn more about the service and understand its value. For more on this feature, see [View Pricebook Pro explainer PDFs](#).

## Projects

- ★ **Deactivated project labels treatment update:** To ensure you don't lose track of deactivated labels, we have made these changes:
  - In the project label dropdown, we added a *Deactivated* indicator to a project label that was assigned to a project prior to being deactivated. The label disappears when an active label is selected.
  - If a project label is deactivated after it is assigned to an invoice, estimate, job type, technician, discounts, fees, or purchase order, the project label has a strikethrough indicating it is deactivated.

For more on project labels, see [Create project labels](#).

## Purchasing


- ★ **Exclude items from replenishment:** In your pricebook, you can now choose whether an item is automatically replenished or not. This helps you avoid creating replenishment purchase orders for items that aren't usually carried in stock. This update is for the Purchasing Module only.  
**Note:** For materials, replenishment is automatically enabled. For equipment, replenishment is automatically turned off. For more on this feature, see [Include and exclude items from automatic replenishment](#).
- ★ **Purchase order number links to purchase order:** On the *Purchasing* screen, you can now click the purchase order (PO) number to open the PO. Additionally, you can now open a PO in a new tab or window to easily view it. This helps you quickly access POs by right-clicking the PO number. For more on this feature, see [Edit a purchase order from the office](#)
- ★ **Search for office employee or technician in the *Internal Recipients* field:** When sending a PO and selecting an internal recipient, you can now search and identify between office employees and technicians. This improves efficiency when sending a PO to an office employee or a technician. For more on this feature, see [Send purchase orders](#).
- ★ **Group replenishment items on purchase orders** If items have the same *ship to location*, *inventory location*, *item code*, *vendor part number*, and *item description*, they are now combined into a one-line item. This makes it easier, when a vendor sends an invoice, to keep track of receipts. For more on this feature, see [Replenish items with purchase orders](#).
- ★ **New Purchasing and Inventory tabs:** On the *Inventory Configuration* page, there are now tabs that hold the configurations for Inventory and Purchasing. This makes it easier to configure your account. Additionally, this helps to avoid confusion if you're using the Purchasing module. For more on this feature, see [Inventory and Purchasing Configurations](#)
- ★ **Option to skip weekends on a PO:** Under the *Required Date* field on a purchase order (PO), you can select **Skip Weekends**. This saves you time from having to manually set required dates to Monday for replenishment POs that were created on a Friday for delivery the next day. For more on this feature, see [Set up purchase order types](#).
- ★ **Hide vendors in ServiceTitan Mobile:** You now have the option to hide certain vendors from technicians on ServiceTitan Mobile. This prevents technicians from creating POs from unapproved vendors. For more on this feature, see [Set up vendors](#).

- ★ **Add items to a receipt that are not on the purchase order:** You can now add an item to a receipt when receiving a PO. This helps you accurately record what you received even if you were sent the wrong items. For more on this feature, see [Receive purchase orders in full or partially](#).
- ★ **Copy invoice items to purchased orders:** You can now copy items from an invoice to a PO. This saves you time from having to enter items from an invoice and then manually enter the same item to a PO. For more on this feature, see [Create a purchase order](#).

## Reporting

- ★ **New scheduled date KPIs in Jobs report template:** The Jobs report template includes two new key performance indicators (KPIs) to help report on job scheduling:
  - **Scheduled Date Week Number**—Week number of the year of the most recent scheduled appointment of the job
  - **Scheduled Date Year Month**—Year and month of the most recent scheduled appointment of the jobFor more on this feature, see [Jobs report template](#).
- ★ **New follow-up KPIs in Estimates report template:** The Estimates report template includes two new key performance indicators (KPIs) to help report on follow-ups:
  - **Last Follow Up Date**—Date of the most recent logged follow up on the estimate's opportunity record
  - **# of Follow Ups**—Total number of follow-ups logged on the estimate's opportunity recordFor more on this feature, see [Estimates report template](#).
- ★ **New built-in Opportunity and Estimate Follow Up report:** The new Opportunity and Estimate Follow Up report includes filters and KPIs that give you additional insights into estimates than the *Follow Up* screen. Use the report to see how well your office employees close unsold estimates. For more on this feature, see [Opportunity and Estimate Follow Up](#) report.
- ★ **Identically named KPIs renamed:** Key performance indicators (KPIs) with the same name, but from different report templates and calculations, have been renamed. This helps avoid confusion when comparing KPIs. [View a full listing of the renamed KPIs](#). For more on this feature, see [Create custom reports](#).

## TitanAdvisor

- ★ **TitanAdvisor navigation improvements:** Based on your feedback, you can view your current TitanScore when you hover over the **TitanAdvisor**  icon in the navigation bar. Also, you can now navigate from TitanAdvisor to other areas of ServiceTitan without first clicking **Back to Dashboard**.

**Note:** If you bookmarked TitanAdvisor in your browser, update the URL to

<https://go.servicetitan.com/#/new/titanadvisor>.

For more on this feature, see [TitanAdvisor overview](#).

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## FIXES

- **Memberships:** After you click **Dismissed** on an event and log a follow up, the status of that event does not change to *Unreachable* or *Contacted*. This fix prevents double recognition errors.
- **Memberships:** On the *Customer Membership* page, the *Renew Membership* button is hidden if you have already renewed the membership for that customer. This fix prevents users from renewing a membership more than once.
- **AR Transactions reports:** Removed invoice, payment, and transaction types columns from the AR Transactions by Job, AR Transactions by Location, and AR Transactions by Customer reports. The fields are not relevant to the reports.
- **Update Job Costing:** When you are billed for a purchase order item, *Job Costing* displays the bill date not the purchase order date.