

ST-66

Release Highlights

Summer 2023



Release Resources



Blue Collar Nerd

Video Release Highlights

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Release Blog

One-Stop-Shop

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Release Notes

All Features & Functions

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Update Business Units in Bulk

The screenshot shows the 'Business Units' management page. On the left is a navigation sidebar with categories like 'Phones', 'Communications', and 'Operations'. The main content area has a 'Business Units' header and a descriptive paragraph. Below this is a toolbar with 'Add', 'Activate', and 'Deactivate' buttons, and a 'Bulk Update' button. A table below the toolbar lists business units with columns for selection, logo, name, official name, min. post date, active status, and actions. Two rows are selected, highlighted in blue.

<input checked="" type="checkbox"/>	Logo	Name ↑	Official Name	Min. Post Date	Active	Actions
<input checked="" type="checkbox"/>		Fast	Good Company East, Inc.		<input checked="" type="checkbox"/>	<button>Edit</button>
<input checked="" type="checkbox"/>		Main	Good Company Main, Inc.		<input checked="" type="checkbox"/>	<button>Edit</button>

Feature Description

You can now update your active Business Units (BU) in bulk. This allows you to make mass changes on your BUs by updating fields across the entire selection at once.

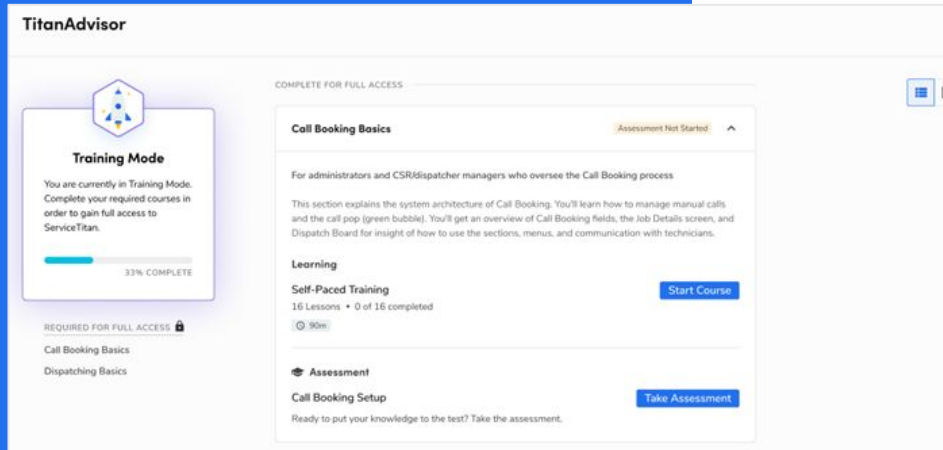
Value to Your Business

Users get to **save time and effort** by making changes to some or all business units. This also streamlines workflows by enabling you to gain more control and get customization at scale.



Automatically available

Training Mode Added to TitanAdvisor



Automatically available

Feature Description

With TitanAdvisor Training Mode, your new office employees are required to complete basic training courses before they can freely navigate ServiceTitan. The TitanAdvisor Admin can also see the training status for everyone else on their team to keep track of their team's progress.

Value to Your Business

Replicate success in your business by utilizing TitanAdvisor's initial training mode to ensure each new employee can quickly get trained and receive the foundational knowledge they need to be successful on the platform.



Online Estimates Enhancement

Email settings

Invoice Estimate Project Application for Payment Statement Form E-Sign Document

From ⓘ Sender email

BCC ⓘ BCC email

Online Link Expiration ⓘ ▾


Resend the Estimate ⓘ ▾ ▾

Feature Description

Two new fields enhance the functionality of online estimate links:

- Online link expiration: set an expiration date when sending online estimate links to your customers.
- Resend the estimate: If the estimate has been dismissed, it won't be resent. The estimate is only sent again if you did not accept or dismiss it.

Value to Your Business

 **Boost productivity** through automation. Gain greater control over estimate expiration dates ensuring you maximize profitability while reducing the need for manually resending estimates.



Automatically available



Configuration Required
for Online Estimates

Access to Financing in Online Forms

Hello, these are your estimates

Apply For Financing

Estimate 1	Estimate 2	Estimate 3												
<table border="1"><thead><tr><th>Your Price</th><th>Member Price</th></tr></thead><tbody><tr><td>\$1,000.00</td><td>\$1,000.00</td></tr></tbody></table> <p>As Low As \$39.23/mo with GreenSky® A Goldman Sachs Company</p> <p>Accept Now</p>	Your Price	Member Price	\$1,000.00	\$1,000.00	<table border="1"><thead><tr><th>Your Price</th><th>Member Price</th></tr></thead><tbody><tr><td>\$1,000.00</td><td>\$1,000.00</td></tr></tbody></table> <p>As Low As \$39.23/mo with GreenSky® A Goldman Sachs Company</p> <p>View</p>	Your Price	Member Price	\$1,000.00	\$1,000.00	<table border="1"><thead><tr><th>Your Price</th><th>Member Price</th></tr></thead><tbody><tr><td>\$1,000.00</td><td>\$1,000.00</td></tr></tbody></table> <p>As Low As \$39.23/mo with GreenSky® A Goldman Sachs Company</p> <p>View</p>	Your Price	Member Price	\$1,000.00	\$1,000.00
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\$1,000.00	\$1,000.00													
Your Price	Member Price													
\$1,000.00	\$1,000.00													

Summary

American Standard Toilet

Member Price	Your Price
\$1,000.00 - \$966.87	\$1,000.00

Feature Description

Your customers can now use the new “Apply for Financing” option in online estimates to go through the GreenSky or GoodLeap financing application process.

Value to Your Business

Boost revenue by allowing users to easily start the financing application process online, anytime. This enhances the overall purchase experience by making it convenient for your customers to apply for financing and get a decision within seconds.



Automatically
available

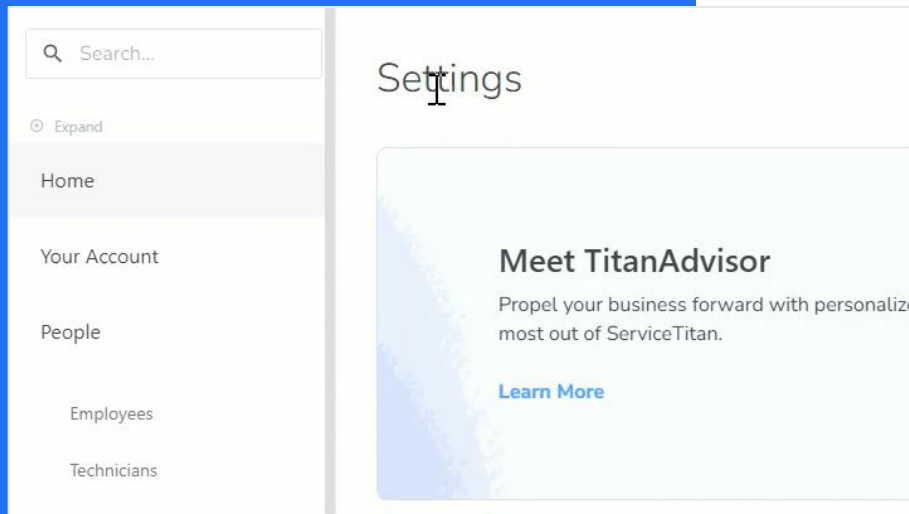


Configuration Required
for GreenSky and GoodLeap

Note: This feature will be available for GoodLeap with ST-66 and for GreenSky through an update a few weeks after.



Invoice Summary Job Requirement



Feature Description

The Invoice Summary field can now be required based on Tech/Job Type when necessary for job completion to keep a better record of work performed on a job.

Value to Your Business

Gain accountability and keep better records of work, ensuring techs provide a summary before closing out the job and staying in control.



Automatically available

Make Custom Fields Required

Cancel and Hold Reasons

Custom Fields

Customer

Forms

Job Booking

Job Types

Project Statuses

Reporting Settings

Tag Types

Timesheet Codes

Zones

Invoicing

Tools

Tags

Summary

No Charge/Unconvertible by default

Invoice Signatures Customer signature on invoices required for this job type.

Search

No results found

Create New Custom Field

Select

Note: Other custom fields may appear with this job type.

Save Cancel Deactivate

Feature Description

You can now assign custom fields to specific job types and make the custom fields required. This helps ensure that only the custom fields required for a specific job type displays.

Value to Your Business

Operate more efficiently by making custom fields required to ensure all critical information is captured during the job-booking process, and simplifies CSR's workflows.

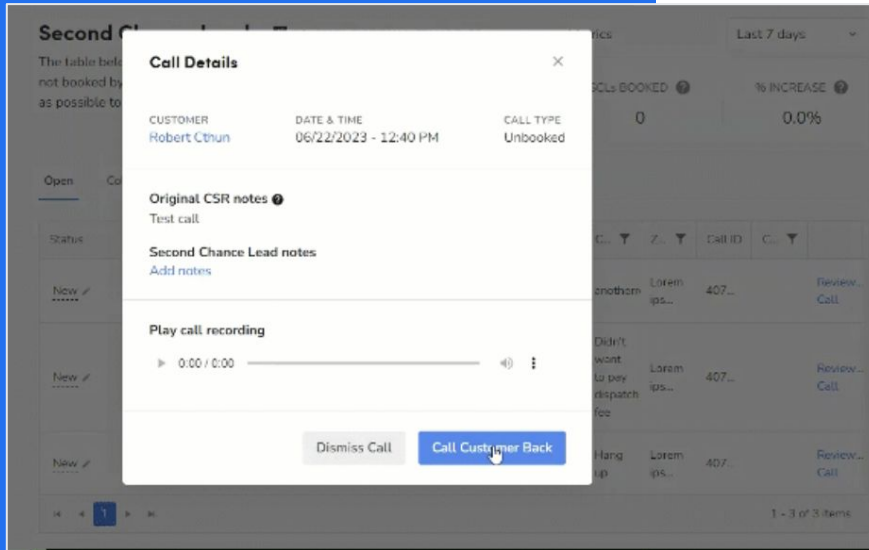


Automatically available



Configuration Required
to show custom fields on call screen

Second Chance Leads



Feature Description

Second Chance Leads helps you call back certain types of unconverted leads and turn them into booked jobs. Powered by Titan Intelligence, Second Chance Leads automatically reviews and flags unbooked calls that could be saved by a quick follow up call back to the homeowner.

Value to Your Business

[Enhance efficiency](#) with Second Chance Leads. This automation feature will save you time and increase revenue without increasing marketing spend.



Automatically available
for Phones Pro customers