



**ServiceTitan<sup>®</sup>**

Release Notes

ST-53

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## About this release

Summer is here, and these updates are hot! With our latest release we are launching TitanCenter, a resource hub for all things ServiceTitan. Check out the redesigned Categories screen in Pricebook where you can efficiently create and edit categories. Plus, you can edit and sync changes to exported invoices in your QuickBooks Desktop. Read on for more, watch the latest [Release Notes Overview YouTube](#), or visit Academy to enroll in the [ST-53 Release Notes Training course](#).

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## Feedback

To make our release notes the best they can be, we would love your feedback. Help us make improvements by [taking this quick survey](#).

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## NEW

### TitanCenter

- ★ **Stay connected with TitanCenter:** We're launching TitanCenter, our resource hub for all things ServiceTitan. In TitanCenter you can find announcements about releases, browse the event calendar for upcoming training and webinars, access recorded workshops, find help, and much more! Visit TitanCenter to ensure you're leveraging all the resources we have for you. For more on this feature, see [TitanCenter overview](#).

## IMPROVEMENTS

### Accounting

- ★ **Enhancements added to *Accounting* screen:**
    - Easily view pending and posted batches by selecting from the batch dropdown in the *Accounting* screen. When you select an existing batch, you default to the batch list rather than unbatched. For more information, see [Batch, post, and export transactions](#).
    - Deposit reconciliation is easier because unapplied payments are included in XLS downloads to the batch screen. For more information, see [Batch, post, and export transactions](#).
    - Business unit (BU) column added for bills, inventory adjustments, and inventory returns on the *Accounting* screen. For more information, see [Batch, post, and export transactions](#).
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- Totals for revenue, balance, and taxes are now accurate because the *Accounting* screen includes values from more than one page, not just the first page. For more information, see [Manage the Accounting section](#).
- ★ **Select batch assignment from the invoice screen:** Now when you click **Add to batch** on the *Invoice* screen, a dropdown with batch names displays. Previously, if you selected a batch and then selected an invoice from the unbatched list, the invoice was added to the batch you selected. The default batch displayed is the one you originally selected or you can select a different batch from the dropdown. For more on this feature, see [Batch, post, and export transactions](#).
- ★ **Edit and sync exported invoices to QuickBooks Desktop:** You can now edit exported invoices and sync the changes to QuickBooks Desktop using ServiceTitan Web Connector. You'll no longer need to create and export adjustment invoices to update an exported invoice. For more information, see [Edit exported invoices](#).

## Dispatching

- ★ **Temporarily disable sending the Rescheduled Reason Survey (RRS):** You can now prevent dispatchers from receiving the RRS for up to 60 minutes after a job is booked and up to 30 minutes after an existing job has been rescheduled. This prevents dispatchers from receiving multiple surveys in a short amount of time. For more on this feature, see [Ask dispatchers why jobs were rescheduled](#).

## Estimates

- ★ **Attach forms and images to estimates from the office:** You can now attach ServiceTitan forms, PDFs, and media files when sending estimates to your customers from the office. This allows you to send all items related to a job in a single email, simplifying the estimate selling process. For more on this feature, see [Send an estimate](#).
- ★ **Link materials and tasks to equipment on estimates:** When building estimates from the office, a new *Equipment* dropdown allows you to link equipment to tasks and materials on the estimate. This helps identify the equipment being serviced on a job. For more on this feature, see [Build and sell estimates from the office](#).
- ★ **When converting a sold estimate to an invoice, equipment links are maintained:** When a sold estimate is converted to an invoice, links between equipment and tasks and materials are maintained. For more on this feature, see [Build and sell estimates from the office](#).

## Integrated Financing and Payments

- ★ **Update EMV payments to send invoice number to NMI rather than invoice ID:** Easily track all payments now that invoice numbers are included with EMV transactions in the NMI gateway. Previously, invoice IDs were passed for EMV transactions. With this change, you can quickly reference which ServiceTitan invoice ties to which transaction. For more on this feature, see [Process credit card payments in ServiceTitan Mobile with the BBPOS card reader](#).
- ★ **Enhanced monthly payment calculator for Service Finance on Online Estimates:** Customers applying for a Service Finance loan through Online Estimates can now enter a loan amount and see their monthly payments for each plan available. This amount is also used to determine which plans a customer qualifies for. For more on this feature, see [Offer Service Finance loans to customers through Online Estimates](#).

## Inventory

- ★ **Email a purchase order with an XLS and PDF attachment with one click:** On a purchase order (PO), you can now click **Send as XLS and PDF** to send one email with both an XLS attachment and a PDF attachment of the PO. This saves you time when you want to send a PO with an XLS and PDF attachment. For more on this feature, see [Send purchase orders to your vendors](#).
- ★ **Set all quantities to zero when receiving partial PO:** You can now click **Set Qty to Zero** to zero out the *QTY Received* column on a partially received PO. If you only received a few items out of a larger purchase order, you can set the *Qty Received* column to zero for the items you did not receive. This change means you won't have to manually set the quantity received column to zero on the items you didn't receive. For more on this feature, see [Edit a purchase order](#).
- ★ **Business Unit required when creating an adjustment:** When creating an inventory adjustment the *Business Unit* field is now required. This improves efficiency and saves time by keeping accounting teams from returning to an adjustment record to update the *Business Unit* field. For more on this feature, see [Create an inventory adjustment](#).
- ★ **Deactivated items are no longer listed in the inventory template:** If an inventory item is inactive, that item no longer appears on active inventory templates or replenishment requests. The item is now deactivated from any template that it is on. This saves you time from going back to manually remove any inactive items. For more on this feature, see [Create inventory templates](#).

- ★ **Inventory location and reference number required on returns:** When creating a return, the *Inventory Location and Reference No* fields are now required. This makes creating a return more efficient by keeping accounting teams from having to go back and update a return record. For more on this feature, see [Create a return](#).
- ★ **Review transactions for items when enabling inventory tracking:** When inventory tracking is enabled for an item, a table appears allowing you to review the impact that enabling that item will have on all open transactions associated with the item. This gives you quick visibility on how enabling inventory tracking for an item affects your inventory. For more on this feature, see [Enable inventory tracking for equipment and material](#).
- ★ **In stock items can no longer be deactivated:** If an inventory item in your pricebook is in stock or on order at an inventory location, that item cannot be deactivated. This prevents unintentionally removing an in stock item from your pricebook. For more on this feature, see [Edit pricebook items](#).

## Invoicing

- ★ **Easier to edit pending invoices when Managed Technician is not assigned:** When a managed technician was not assigned to a completed job and the invoice was in pending status, the invoice could not be edited. Now you do not need a workaround to edit the invoice. Office employees can edit a pending invoice on a completed job when a managed technician is not assigned or is inactive. For more on this feature, see [Edit an invoice](#).
- ★ **Recall, no charge, or warranty job information on invoices:** The *Invoice* screen displays if a job is a recall, no charge, or warranty job; no more searching the job record for that information. For more on this feature, see [Invoice Walkthrough](#).
- ★ **Invoice sent information on Bulk Email Invoice screen:** The *Bulk Email Invoice* screen makes it easy to see if and when invoices were previously sent. You can see sent status at a glance. For more on this feature, see [Bulk email batched invoices](#).
- ★ **Totals on printed estimates are easier to understand:** When a payment has not been made on an estimate, *Sub-Total* and *Total* display on the print estimate. *Balance Due* also displays if a payment was made. This makes print estimates easier to understand. For more on this feature, see [Print or email an invoice or estimate in ServiceTitan Mobile](#).
- ★ **Enhancements added to invoice bulk print:** On the *Bulk Print Invoice* screen, you can now filter by mail delivery preference and print the invoices you want so you can maximize efficiency and minimize cost. For more on this feature, see [Bulk print invoices](#).

# Marketing Pro

## Reputation

- ★ **Quick verify reviews:** With the enhanced *Quick verify* screen, you can now save time by verifying multiple reviews all in one step. In addition, the *Quick verify* screen now helps you quickly identify the job reviews that need to be verified and matched and ensure that they're accurate. For more on this feature, see [Manage reviews](#) and [Manage removed customer reviews](#).
- ★ **Customer satisfaction rating added to technician scorecard:** You can now find the customer satisfaction rating for verified reviews from the Marketing Dashboard displayed next to each technician scorecard. Additionally, when looking at an individual technician scorecard, you can find the customer satisfaction rating. This helps you quickly identify how your technician ratings are doing. For more on this feature, see [Technician Scorecards](#).

## Email and direct mail

- ★ **Merge tags added to the subject line of an email sequence:** When creating or editing an email campaign, you can now use merge tags in the subject line as you're building the email sequence. For example, you can add the *Customer first name* merge tag in the subject line for the subject of your email to be personalized to each audience recipient's first name. This helps you save time when sending marketing emails by having the subject line of your email ready. For more on this feature, see [Create and edit email campaigns](#).
- ★ **Undo and redo options added to Audience Builder:** In the Audience Builder, you can now redo or undo the changes you make while editing an audience. This ensures that your work is not lost when you're trying to select best options for your audience, and it helps you save time ideating the best audience for your campaign. For more on this feature, see [Create and edit audiences](#).
- ★ **Update email sequence order in campaign builder:** When building an email campaign, in the *Build Email Sequence* step, you can now reorder the sequence of the emails. This saves you time when editing the email sequence for a campaign because you don't have to delete and re-add an email every time you want to change the order. For more on this feature, see [Create and edit email campaigns](#).

## Core

- ★ **Email Marketing section in Marketing Pro Settings renamed:** The *Email Marketing* section in Marketing Pro Settings is renamed to *Marketing* to include the Direct Mail

products that are going to use fields such as Attributed windows, business details, and more. For more on this feature, see [Manage Marketing Pro email settings](#).

## Memberships

- ★ **Renew Membership from the customer membership record:** You can now renew memberships from the customer membership record with a click of a button. Previously, the *Renew Membership* button was on the *Edit Customer Membership* screen. This simplifies the membership renewal process. For more on this feature see [Generate, print, and email membership renewal estimates](#).
- ★ **Permission to sell memberships includes renewals:** Enabling the *Allow employee to sell a membership from customer or location record* permission now allows employees to renew memberships from the office. This makes it easier for employees to renew and sell memberships by only enabling one permission. For more on this feature see [Follow up on expiring memberships](#).
- ★ **Enhancements added to invoice template:** The invoice template is redesigned to align with the existing estimates template to help you maintain consistency when creating templates. For more on this feature, see [Create and manage invoice templates](#).

## Mobile

- ★ **Add attachments to completed and on-hold jobs:** Technicians can add photos and videos to jobs that are complete or on hold. Previously, if a technician forgot to add attachments, the office had to attach them. This functionality is enabled by default for all technicians. You can disable it by deselecting the technician permission, *Allow uploading attachments after the job is completed or put on hold*. For more on this feature, see [Add media to a job with mobile phone capture](#).
- ★ **Reschedule link on appointments:** Technicians can reschedule upcoming appointments by clicking the new *Reschedule* link on the appointment they want to reschedule. Previously if a technician wanted to reschedule an appointment, they had to dispatch and arrive themselves, then schedule a new appointment. This update limits unnecessary dispatch notifications and is ideal for technicians who manage their own schedules. Technicians who are already at an appointment and want to reschedule still have to use *Closeout* and schedule a new appointment. This functionality requires the *Reschedule an Appointment* permission which is disabled by default. For more on this feature, see [Reschedule an appointment](#).
- ★ **Display Pricebook Category descriptions:** When viewing categories in ServiceTitan Mobile, an icon displays if the category has a description. When you tap the icon, the



category description displays in a pop-up. For more on this feature, see [Build and sell estimates in ServiceTitan Mobile](#).

- ★ **Mobile Estimate screen support for BBPOS card readers:** After building or selling an estimate in ServiceTitan Mobile, technicians can now use the BBPOS card readers to take credit card payments on the *Estimate* screen in ServiceTitan Mobile. This provides an easy and secure way of taking payments. For more on this feature, see [Process credit card payments in ServiceTitan Mobile with the BBPOS card reader](#).
- ★ **Add equipment to a purchase order (PO):** When a technician creates a PO from the mobile app, they can now add equipment to the PO. This gives the technician the flexibility to create a PO if the office is closed or busy. For more on this feature, see [Create a purchase order in ServiceTitan mobile](#).

## Payments

- ★ **Edit refund amount with automated refunds:** Previously, if a refund amount needed to be changed, you had to delete the refund and create a new one. Now you can edit the refund amount provided you have the correct permissions. For more on this feature, see [Edit or delete a refund](#).
- ★ **Project number added to Payment Collections:** In the *Apply to Invoice* section of the *Collect & Apply Payment* screen, project numbers are now displayed for invoices with a positive balance that are part of a project. There's no longer a need to open an invoice to see the project number. For more on this feature, see [Collect a payment](#) and [Apply available credit to an invoice](#).
- ★ **Refund invoices for each invoice:** To quickly see if an invoice has related refunds, the *Adjustment Invoices* section of the *Invoice* screen lists refund invoices as well as adjustment invoices. For more on this feature, see [Refund payment applied to an invoice](#).
- ★ **View unapplied credits offset by refunds:** Unapplied payments that are fully refunded now appear in the *Unapplied Payments* section of the *Customer* page. Refunds display as negative payments below the original payment. Users can now edit the refund or original payment even when it is fully refunded. For more on this feature, see [Refund unapplied payment](#).

## Pricebook

- ★ **Redesigned Categories screen:** The redesigned *Categories* screen makes creating and editing pricebook categories more efficient.

- Previously you had to use Excel to move categories to different levels. This can now be done on the *Categories* screen.
- In addition to flexible drag-and-drop features, the screen now provides inline editing to easily change your pricebook items.
- A new *Description* field helps technicians navigate through categories in ServiceTitan Mobile.

For more on this feature, see [Set up Pricebook categories and subcategories](#).

- ★ **Display category descriptions in Mobile View:** When viewing categories in *Mobile View* from Pricebook, an icon displays for a category with a description. When you click the icon, the category description displays in a pop-up. For more on this feature, see [Set up pricebook categories and subcategories](#).
- ★ **Pricebook Connect enhancements:** Improvements in Pricebook Connect let you now search for the items that you want to update in your pricebook as well as filter the updates by specific fields and show updates by categories. There's a new *Auto Dismiss* feature that lets you select a provider's field updates that you don't want to apply to your pricebook. These dismissed updates move to a new *Dismissed* tab, so you will no longer see those updates in the *Updates* tab. When viewing dismissed updates, you can recover and apply the updates to your pricebook or remove the updates completely. For more on this feature, see [Update your pricebook with Pricebook Connect](#).
- ★ **Enhanced provider catalog mapping in Pricebook Connect for vendor content management:** The mapping workflow has been significantly enhanced to provide more search, filter, and selection options when mapping your pricebook items with matches found in your provider's catalog. For more on this feature, see [Add provider catalog items to your pricebook with Pricebook Connect](#).
- ★ **New inline bulk editing of the General Ledger Account/Income Account/Intacct Item GL Group field:** When inline editing services, materials, and equipment, you can now quickly make bulk updates to the *General Ledger Account* (for QuickBooks Online) / *Income Account* (for QuickBooks Desktop) / *Intacct Item GL Group* (for Intacct Integration) without going to another screen. For more on this feature, see [Bulk edit pricebook items](#).

## Purchasing

- ★ **PO number added to email subject line:** When you email a PO, the PO number now appears in the subject line of the email. This helps you quickly identify the PO the email references. For more on this feature, see [Send a purchase order to your vendor](#).

- ★ **Bulk update inventory items:** You can now click **Bulk Item Update** from an invoice to update inventory items. Additionally, on the *Bulk item update* screen, you can now partially save your bulk item update without populating all the fields. This helps you update items quickly and saves you time with bulk updates. For more on this feature, see [Add inventory equipment, materials and tasks to an invoice](#).  
**Note:** This feature is only enabled if you're using the Purchasing module, and not the Inventory module.
  
- ★ **Replenishment for items occurs after job start date:** Replenishment for items on an invoice won't be triggered until after a job has started. This helps to ensure that if a job is cancelled before it starts, you are not replenishing items that weren't used. For more on this feature, see [Replenish items with purchase orders](#).
  
- ★ **Create a return in ServiceTitan mobile:** With permission, technicians can now create a return on a job PO in the ServiceTitan mobile app without having to contact the office. This saves the technicians time when creating a return in the field. For more on this feature, see coming soon.  
**Note:** This improvement will be available on July 19th.

## Reporting

- ★ **Usability improvements in reports:** New changes to enhance the user experience:
  - The report screen now includes a report description
  - The report screen information section includes additional report details
  - More efficient default column spacing in reports
  - A new option to export aggregated report data for added flexibility
  - Share reports more efficiently directly from the report screen
  - Grouped data in reports include aggregate totalsFor more on these features, see [Run, filter, and export reports](#) and [Aggregate report data](#).
  
- ★ **Updated *New or Existing* KPI for Customers report template:** The *New or Existing* column of the Customers report template, which is used to identify new customers, has been updated to classify customers with profiles created on a date *after* the report date filter range. Now, customers are more accurately labeled based on when their customer profile was created:
  - **Existing**—Created before the report date filter range
  - **New**—Created within the report date filter range
  - **Future**—Created after the report date filter rangeFor more on this feature, see [New Customers report](#).

- ★ **New built-in customer reports:** There are three new built-in reports focused on your customers that you can use for marketing purposes and historic reporting:
  - **Customer List report**—Includes contact information plus lifetime job, revenue, and invoice details
  - **New Customers report**—Lists newly added customers including member status, contact information, original campaign source, and more
  - **We Miss You report**—Finds customers you haven't serviced in awhile based on their last completed job

For more on these reports, see [Customer List report](#), [New Customers report](#), and [We Miss You report](#).

## Telecom

- ★ **PowerDialer:** PowerDialer enables Phones Pro customers to automate outbound calls for customer support representatives (CSRs) so they can maximize call volume.

PowerDialer allows you to:

- Use Audience Builder to create built-in lists
- Assign CSRs to multiple lists and campaigns
- Open specific records to display during calls
- Provide instructions, scripts, and important details for CSRs
- Limit multiple calls to the same customer
- Drag and drop campaigns based on priority
- Prioritize of inbound calls over outbound calls
- Create one-time and ongoing campaigns

For more on this feature, see [Set up PowerDialer campaigns](#).

## TitanAdvisor

- ★ **New required TitanAdvisor features:** There are new requirements to advance through TitanAdvisor stages:
  - The new *Set up job types for scheduling and reporting* feature is required to advance past the Acceleration stage.
  - The existing *Enhance the customer experience with mobile forms* and *Use form triggers to capture key job data* features are now required to advance past the Acceleration stage.
  - The *General ledger accounts* feature is now in the Acceleration stage and is required to advance.

For more on this feature, see [TitanAdvisor scoring and stages](#).

## FIXES

- ★ **Inventory:** Until now, you were able edit sent POs, which caused ServiceTitan to show POs that did not match what the vendor received. To edit a PO now, you have to return the PO to *Pending* status.
- ★ **Job costing:** Until now when *View Job Costing* was enabled and *Show Cost Details* disabled, *Job Costing* displayed on invoices. Now *Job Costing* is viewable only to office employees with both *View Job Costing* and *Show Cost Details* permissions enabled.
- ★ **Modular Dashboard:** Headings, descriptions, and tooltips are updated in the Modular Dashboard.
- ★ **Reporting:** The *AR Transactions* report incorrectly excluded invoices with incomplete jobs and invoices with blank dates when *Exclude incomplete jobs* was not selected. Now, report data accurately reflects the *Exclude incomplete job* setting. For more on this feature, see [AR Transactions report](#).
- ★ **Export unapplied refunds to Intacct:** The Automated Refund Workflow now exports refund payments not applied to an invoice to Intacct.
- ★ **Payment business unit:** When there's a payment on an invoice and the job's business unit (BU) is updated, the payment has the updated BU.