

Preparing for your upgrade to the Field Mobile App

- Faster performance, more reliable
- Built for efficiency
- Always up to date
- Get more done



Customer Checklist

Use this checklist to help prepare your company for your upcoming upgrade to the new **Field Mobile App**, designed to provide mobile-first workflows for today's field operations - making it easy for techs to log time, capture data, and stay productive in the field. Fill in your upgrade date below when you receive notice (please check your emails from ServiceTitan Mobile Team or your CSM. Raise in your next meeting with your CSM if you do not know your upgrade date.

My upgrade date is:

1-2 months before upgrade

- ☐ **Admins:** Make sure these pre-items are completed before upgrading to Field Mobile App:
 - ☐ [Technician profiles are created](#) (Managed or Non-Managed)
 - ☐ Required [permissions](#) are enabled for each technician
 - ☐ If using iOS, make sure you are operating on 17.4 or later.
- ☐ Read through or watch the following training materials on the new Field Mobile App:
 - ☐ [Knowledgebase Articles](#)
 - ☐ [Academy Video](#) (Resi)
 - ☐ [Academy Video](#) (Commercial)
 - ☐ Explore Best Practice [Basics](#) and [Key Workflows](#) training content
 - ☐ [Blue Collar Nerd Video](#)
- ☐ Schedule another meeting with your technicians to remind techs of the upcoming upgrade and reshare any training materials.
- ☐ Remind your entire company about the new Field Mobile App in your team meetings and send out a follow-up email to the team for their reference.
- ☐ **Start exploring the Field Mobile App!** Have your techs access the Field Mobile App and sign in with their existing credentials
 - ☐ **For Apple Devices:** [Get ServiceTitan Field on the Apple App Store](#)
 - ☐ **For Android Devices:** [Get ServiceTitan Field on Google Play Store](#)

Best practices:

- ☐ **Let a few technicians test it out:** Get familiar with the new workflows before your team fully transitions. *Be sure to test in NEXT first!*
- ☐ **Review the training guides and resources:** We've built several guides and videos to help train your teams - just click on the links in this checklist.
- ☐ **Stick to one app per job:** To avoid issues, we recommend using *either* the new Field App *or* the current app for a given job—not both.
- ☐ **Continue using the current app if needed:** The current ServiceTitan Mobile App will remain available until your upgrade date.



Week of upgrade

- ☐ Send out reminder emails to all teams of the upcoming change.
- ☐ Circulate any documentation or materials you want your teams to review
- ☐ Decide on a point of contact for each team in case of a question or issue the day of the upgrade.
- ☐ If you haven't already, have techs download the **Field Mobile App** and sign in with their existing credentials:
 - ☐ **For Apple Devices:** [Get ServiceTitan Field on the Apple App Store](#)
 - ☐ **For Android Devices:** [Get ServiceTitan Field on Google Play Store](#)
 - ☐ Test in NEXT environment first!

Day of upgrade

- ☐ Handle incoming questions and keep a running list of those questions that you didn't account for in your original training and documentation.
- ☐ Keep a positive mindset! Change is never easy, but adequate preparation will always help ensure a smooth transition. We suggest you make note of questions that are not blockers for your business and focus instead on coaching your team through their first day using the Field Mobile App!
- ☐ If techs have not yet done so, they must download the **Field Mobile App** and sign in with their existing credentials
 - ☐ **For Apple Devices:** [Get ServiceTitan Field on the Apple App Store](#)
 - ☐ **For Android Devices:** [Get ServiceTitan Field on Google Play Store](#)
 - ☐ Test in NEXT environment first!

Day of upgrade (continued)

- ☐ (Optional) Review the [Before & After Guide](#) with your technicians so they understand the similarities and differences between the legacy app and the new one
- ☐ **Admins:** Double check these configurations. They should be identical to what you had in the legacy mobile app:
 - ☐ [Add & manage technician profiles](#)
 - ☐ [Set up required arrival forms](#)
 - ☐ [Enable native GPS](#)
 - ☐ [Set up your Atlas, your AI sidekick](#)
 - ☐ [Use conditional logic in forms as needed](#)
 - ☐ [Manage technician reactivation/deactivation](#)

After upgrade

- ☐ Monitor your staff's adoption of the Field Mobile App. Correct workflows where needed and improve any inconsistencies uncovered by your team.
- ☐ Keep documenting irregular scenarios to ensure you grow your standard list of procedures for staff to reference whenever needed.
- ☐ Send any feedback or updates to our Product Team at fieldappsupport@servicetitan.com
- ☐ Like the app? Give us a review on the [Apple App Store](#) or [Google Play](#)

