

ST-71

# Release Overview

Fall 2024



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# Release Resources



## Release Notes

All Features & Functions

[Learn More](#)



## Release Guide

One-Stop-Shop Blog

[Read more](#)



## Blue Collar Nerd

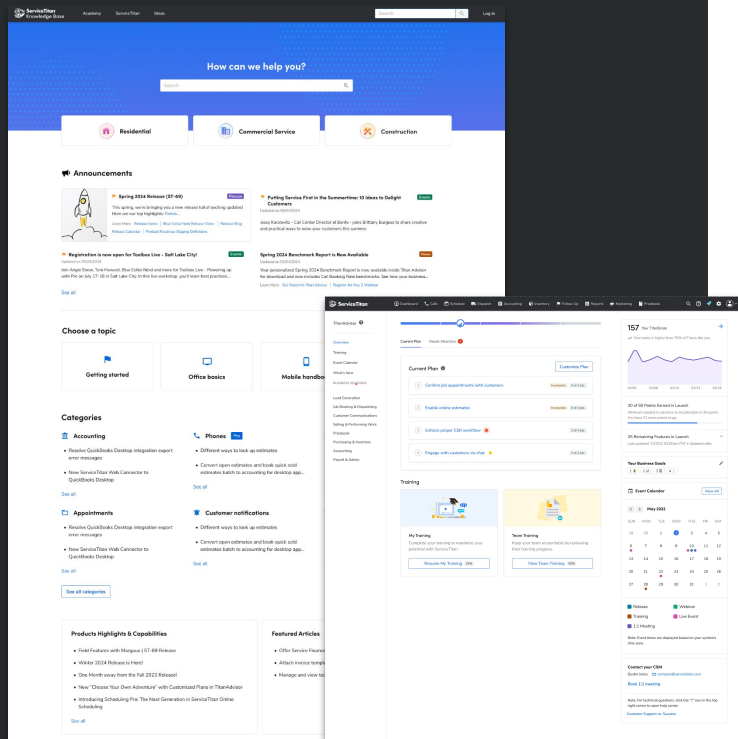
Video Highlights Review

[Watch Now](#)

# Fall '24 Highlights



# Community Features in ServiceTitan



## Overview

ServiceTitan customers can now easily access the following features formerly available in Community directly inside ServiceTitan from a centralized location:

- **Events Calendar and CSM contact information** - accessible from Titan Advisor
- **Announcements, Product Capabilities and Ideas** - accessible from Knowledge Base

## Value to your business

- Increased efficiency for ServiceTitan customers by providing centralized resources
- Simplified customer experience

## How to get started

Visit the [Knowledge Base](#) and [Titan Advisor](#) see these features.

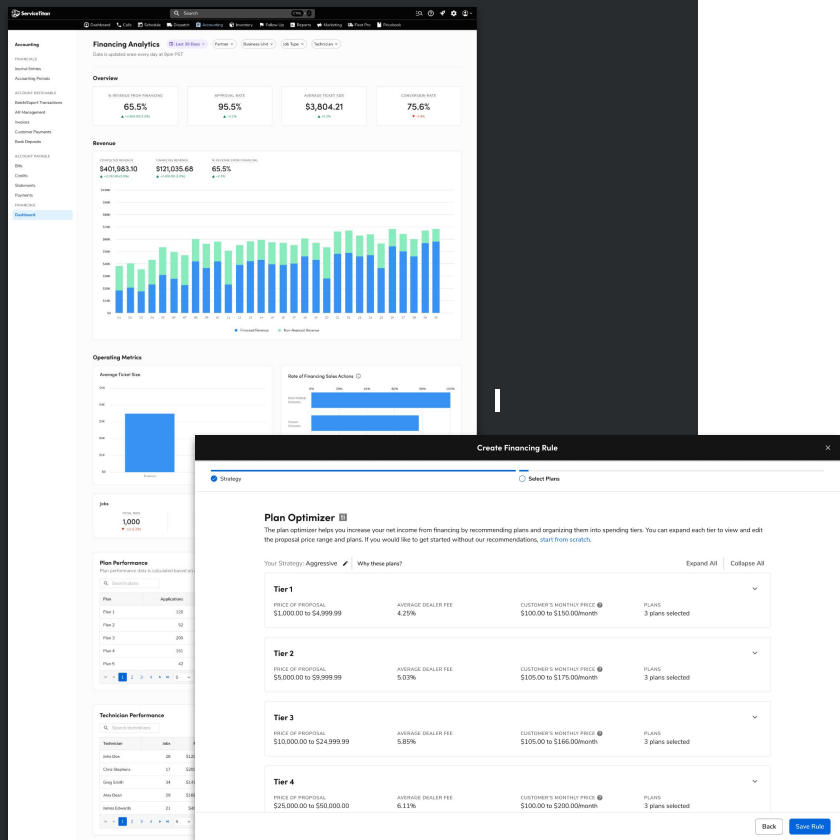


Automatically available

ServiceTitan



# New Financing Features



## Overview

ServiceTitan Integrated Financing customers can now offer more financing options from **Wells Fargo** and **Synchrony**, quickly set up financing plans with the new **Plan Optimizer**, and monitor financing performance with the new **Financing Dashboard**.

## Value to your business

- More financing options for your customers to choose from
- Quickly offer the right financing plans by accepting recommendations from ServiceTitan
- Lead with financing on every job by ensuring every technician is offering it

## How to get started

Dashboard: [Accounting>Financing>Dashboard](#)

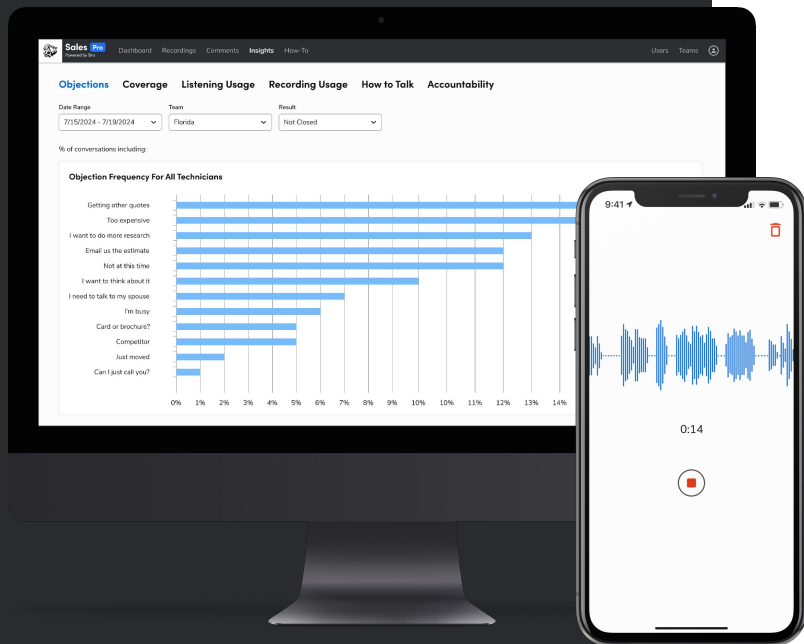
Plan Optimizer: [Settings>Integrations>Financing](#)

Contact [financing@servicetitan.com](mailto:financing@servicetitan.com) to configure Wells Fargo and Synchrony.

**Not yet on Integrated Financing?** [Request a demo.](#)

# Sales Pro

Early Access



## Overview

ServiceTitan Sales Pro helps residential contractors capture, analyze and learn from in-person interactions to arm your business and technicians with the tools and insights they need to increase ticket size, close more deals, and drive more revenue

## Value to your business

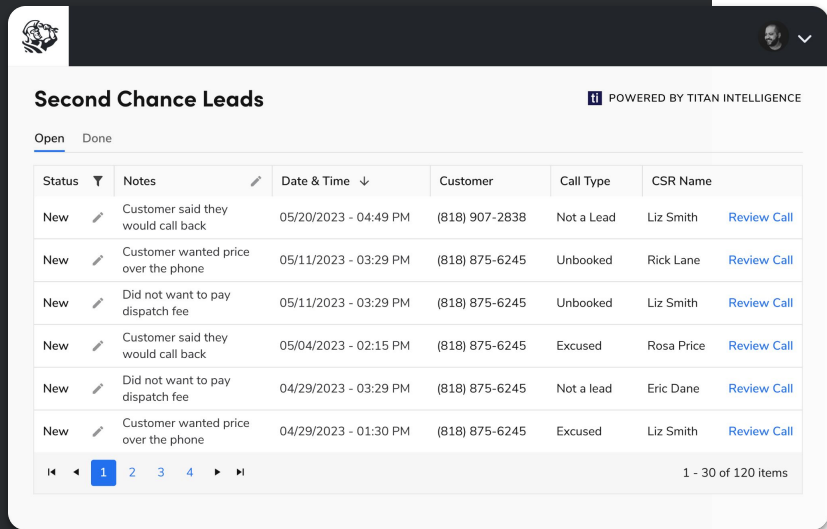
- Boosts performance of service professionals who aren't inherently salespeople
- Provides specific feedback that drives improvement
- Provides visibility and insights for improved coaching and accountability.

## How to get started

Request a demo [here](#).

# Second Chance Leads for Basic Phones

Limited Release



Status	Notes	Date & Time	Customer	Call Type	CSR Name
New	Customer said they would call back	05/20/2023 - 04:49 PM	(818) 907-2838	Not a Lead	Liz Smith <a href="#">Review Call</a>
New	Customer wanted price over the phone	05/11/2023 - 03:29 PM	(818) 875-6245	Unbooked	Rick Lane <a href="#">Review Call</a>
New	Did not want to pay dispatch fee	05/11/2023 - 03:29 PM	(818) 875-6245	Unbooked	Liz Smith <a href="#">Review Call</a>
New	Customer said they would call back	05/04/2023 - 02:15 PM	(818) 875-6245	Excused	Rosa Price <a href="#">Review Call</a>
New	Did not want to pay dispatch fee	04/29/2023 - 03:29 PM	(818) 875-6245	Not a lead	Eric Dane <a href="#">Review Call</a>
New	Customer wanted price over the phone	04/29/2023 - 01:30 PM	(818) 875-6245	Excused	Liz Smith <a href="#">Review Call</a>

1 - 30 of 120 items

## Overview

Powered by ti, Second Chance Leads automatically reviews and flags unbooked calls that we believe can be saved with a quick follow-up call back to the homeowner.

## Value to your business

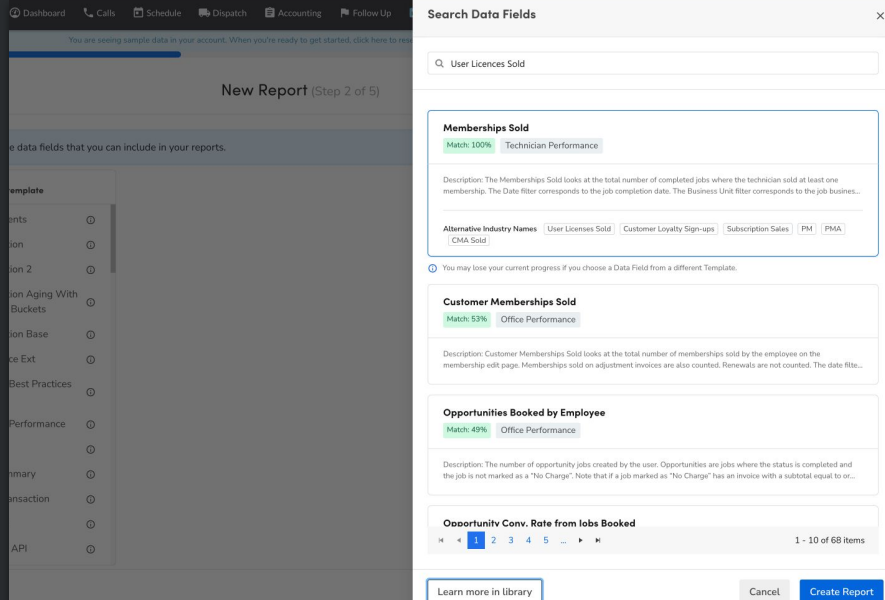
Increase booking rate by capturing lost leads and providing customers with the opportunity to turn them into booked jobs.

## How to get started

Select customers can purchase Second Chance Leads for Basic Phones directly in ServiceTitan by going to [Calls > Second Chance Leads](#). If you do not see this in your account but are interested, [add your name to waitlist to request access](#).

# Reporting Library

## Early Access



## Overview

Quickly create the report you need without having to first choose a template by easily searching for the exact metric you need using familiar industry terminology, streamlining your process and supporting better business decisions.

## Value to your business

- Save time with faster report generation
- Reduce confusion with terminology flexibility
- Increase confidence in knowing details on key metrics

## How to get started

Available in Early Access. Sign up [here](#).

# Fall Benchmark Report

Available November 1

**Fed's September Rate Cut Sparks Uncertainty: Relief or Consumer Unease?**

After months of anticipation, the Federal Reserve cut its key overnight lending rate by half a percentage point in September, its first reduction since March 2020 but it's unlikely to make a huge difference for those struggling to afford a home.

**Mortgage rates might not actually drop much further right now**

Mortgage rates, which fell below 3% during the pandemic, had risen to nearly 8% but did so in anticipation of the rate cut. Although the Fed's decision may already be factored into rates, further reductions are expected and Fannie's similar economic forecasts only a 1% to mortgage rates post the September cut, 30-year mortgage rate potentially reaching 5.5% by the end of 2025, well above pre-pandemic levels.

**Lower mortgage rates could actually mean higher housing prices**

How? Lower mortgage rates could lead to higher home prices by attracting more buyers and increasing competition for the limited housing supply. Many first-time buyers anticipated that lower rates would mean lower home prices, but they were disappointed by high rates and prices. Those who didn't buy early in the pandemic, when rates were low but prices hadn't yet surged, often regret that decision. The major issue now is a significant shortage of starter homes for first-time buyers.

**Dropping interest rates could lead to more housing supply**

A major factor driving high home prices is the shortage of housing supply in the U.S. in short sections of coastal, urban, supply has not kept pace with demand, especially in the large metropolitan areas in Florida, California, and New York. High interest rates, 6.5-7.5%, making it harder for homebuilders to get projects off the ground, especially smaller, private developments. That's because the rates are consistently higher than the Fed's rate. So this rate cut should make it easier for those to get building again.

**2024 Summer: Record Heat and Hurricanes Hold Steady 9% Revenue Growth**

The meteorological summer (June-Aug) average temperature for the contiguous U.S. was 73.8°F, 2.5°F above average, which is the fourth-warmest summer in the 120-year record.

Temperatures were above average to record warm across much of the western U.S. and from the Gulf Coast to the Northeast. Arizona, California, Florida, Maine, and New Hampshire each had their warmest summer on record.

Summer 2024 saw record-breaking weather events across various climate regions in the South. Hurricane Beryl caused widespread flooding and power outages in Houston, affecting areas from East Texas to the Northeast and Atlantic Canada. This year's Hurricane season was the longest since 1970. Hurricanes on or moved north, yet still caused significant impacts across the Southeast U.S., particularly in the southern Appalachians, Baltimore and Washington, D.C. had unusually high heat, with four consecutive days over 100°F. And Phoenix set a new record with 113 consecutive days at or above 100°F.

**ServiceTitan Benchmark Report**



Automatically Available

## Overview

Residential and commercial contractors can get personalized, data-driven quarterly benchmarks tailored to the trades, plus market trends and insights and Titan Advisor recommendations.

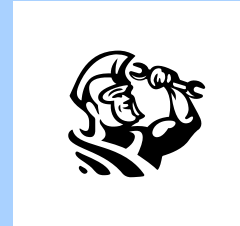
## Value to your business

- See how your business ranks and gain actionable insights to improve performance
- Make informed, data-driven decisions
- Enhance credibility among PE firms, investors, partners, and internal teams.

## How to get started

Starting November 1, download your free Fall Benchmark report by going to [Titan Advisor](#) and clicking link below your Titan Score. The Summer Benchmark Report will still be available to download through October 31.

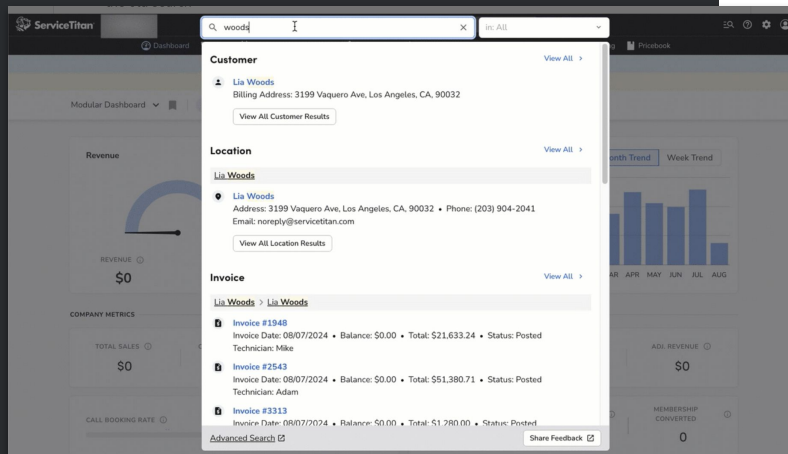
# Other Notable Features





# Global Search

Early Access



## Overview

Global Search enables you to easily find the records you need across multiple categories with a single, intuitive search bar, giving you instant results while reducing clicks and frustration.

## Value to your business

Save time by finding your search records from anywhere in ServiceTitan

## How to get started

Rollout to all customers will be made over next few months.



Configuration Required

## PAYMENTS

# New Card Readers



Configuration Required

## Overview

The **new ID Tech card reader** offers enhanced Bluetooth connectivity for wireless transactions and works both online and through iOS and Android. Its secure encryption, improved transaction speed, and added protection reduce fraud, making payments safer and faster.

## Value to your business

Get paid faster

## How to get started

Configuration required. ServiceTitan Payments customers contact [fintechsupport@servicetitan.com](mailto:fintechsupport@servicetitan.com).



## PAYMENTS

# Save Card by Default

### Enable Payment Options

- Enable Credit Card Payments
- Enable ACH Payments  
Note: ACH bank transfers are limited to \$250,000 per transaction
- Enable sending SMS payment links in desktop via ServiceTitan Office
- Enable sending email invoice links in Mobile
  - Also enable sending SMS payment links via Mobile
- Allow partial payments  
Note: Statements do not support partial payments.
- Default the Save this payment method for future transactions in the mobile checkout with your technicians  
Note: This setting applies to both credit card and ACH payment methods.



Automatically available

## Overview

Automates card-saving in mobile checkout, making it easier to capture more cards on file and collect future payments.

## Value to your business

Get paid faster and reduce collections in the future

## How to get started

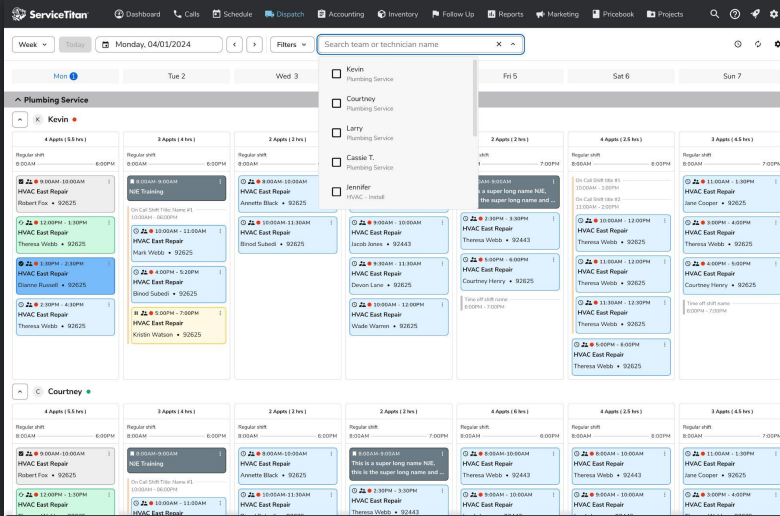
This feature is **Coming Soon.**

Set up by going to **Settings > Invoicing > Online Payments**

DISPATCH

# Weekly Dispatch Board

Early Access



Configuration Required

## Overview

The Weekly Dispatch board boosts productivity and streamlines decisions with an actionable seven-day view of technician schedules. Strategically handle job appointments and ensure optimal utilization of techs.

## Value to your business

- Plan and manage resources more efficiently
- More informed and responsive decision making
- Streamlined dispatching workflow management
- Optimized tech utilization over a week

## How to get started

Contact your Customer Success Manager for early access.

## MARKETING PRO

## Autopilot

Marketing Pro &gt; Launch Campaigns

## Launch campaigns

Select campaigns tailored to your business needs.

Skip Launch

The screenshot displays three campaign cards in a grid. Each card has a 'Skip' button and a 'Launch' button. The first card is for 'TITAN HOME SERVICES' with a 'STAY COOL THIS SUMMER' theme, featuring a sun icon and a 'Seasonal HVAC Tune-Up Specials' title. The second card is for 'TITAN HOME SERVICES' with a 'Refer A Friend' theme, featuring an illustration of two people and a 'Share The Love' title. The third card is for 'COMPANY' with a 'beat the heat this summer.' theme, featuring a dog wearing sunglasses and a '\$\$\$ TUNE UP SPECIAL' badge.

Campaign Name	Target Audience	Potential Reach	Launch Date
Seasonal HVAC Tune-Up Specials	Inform customers about their seasonal HVAC tune-up.	108	Today
Refer A Friend	Inform customers about their upcoming HVAC inspection.	279	07/01/2024
Beat the Heat this Summer	Inform customers about their membership having expired.	94	Today

## Overview

Marketing Pro AutoPilot enables businesses to connect with customers through automated, proven campaigns. It eliminates manual tasks and allows contractors to quickly activate pre-built campaigns based on real-time capacity to build a strong demand generation pipeline. AutoPilot also delivers automated performance reports, insights, and optimizations to enhance efficiency, save time, and boost ROI.

## Value to your business

Launch campaigns quickly

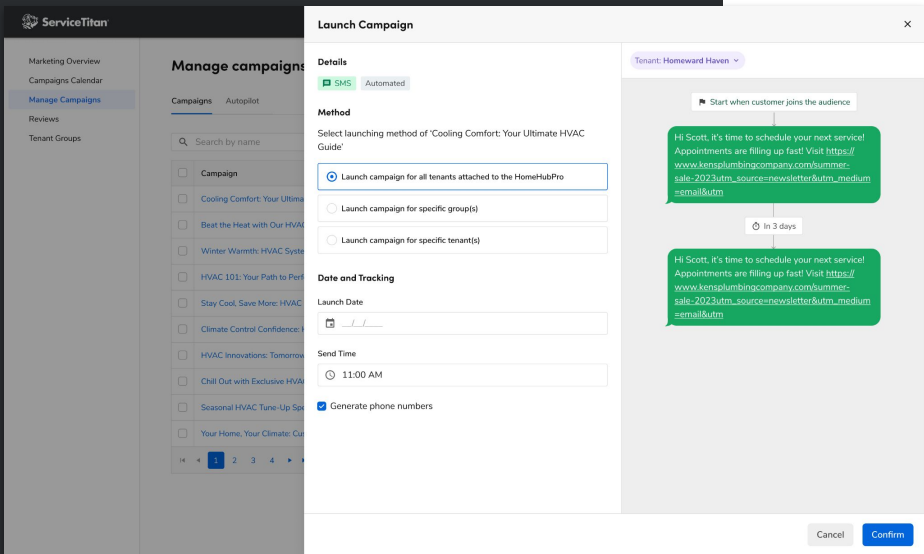
## How to get started

This feature is automatically enabled for all Marketing Pro customers.

If not a Marketing Pro customer, [request a demo](#) to learn more



Automatically Available in Marketing Pro



## Overview

Marketing Pro Enterprise streamlines campaign management for businesses with multiple brands by consolidating data into a single platform. It offers real-time feedback, consistent metrics, and advanced analytics, enhancing collaboration and decision-making. Scalable and cost-effective, it optimizes performance to drive growth and success across all business units.

## Value to your business

- Saves time and eliminates the need to recreate campaigns for each tenant
- Allows you to monitor campaign performance using Rollup Reporting and stop campaigns as needed.

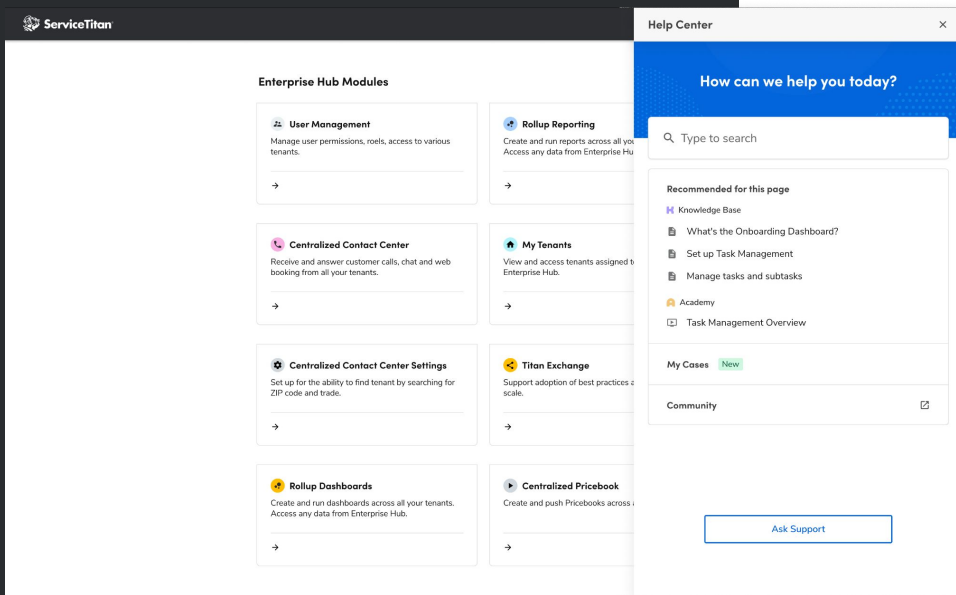
## How to get started

Must be a Marketing Pro customer and have Enterprise Hub access



Automatically available with  
Marketing Pro + Enterprise Hub

# Help Center



## Overview

Access the Help Center to find relevant product articles, interact with the chatbot, and track your company's support cases.

## Value to your business

- Quick access to product knowledge
- 24/7 support through chatbot assistance
- Efficient case management for faster issue resolution

## How to get started

Enterprise Hub users - start using it today!



Automatically Available

# You Asked, We Listened (YAWL)



# You Asked, We Listened (YAWL)



Learn more about the YAWL program [here](#).

Submit your ideas in the new Ideas section of the Knowledge Base rolling out in this release!

## Search

- Single global search box

## Fintech

- Wells Fargo and Synchrony Integrations
- Save Card by Default\*

## Dispatch

- Improved Dispatch Messaging

## Job Planning and Management

- Project Portfolio Search

## Pricebook

- Dynamic Pricing based on Business Units\*
- No configuration needed for Template Pricebook Item\*

\*Coming Soon

ServiceTitan Knowledge Base Academy ServiceTitan Ideas

Home > Ideas

## Ideas

Please refer to the [Idea Guidelines](#) to familiarize yourself with the ServiceTitan Ideas platform.

Search all ideas...

+ ADD A NEW IDEA

My ideas	0
My votes	0
My subscriptions	0

FILTER BY CATEGORY

Accounting	677
Call Booking / Jobs	784
Community	36
Customer and Location Profiles/Leads	353
Customer Communications	360
Dispatch	463
Enterprise Hub	9
Equipment	110
Estimate / Follow Up	525

### All ideas

- 16** **Set a default inventory location by BU/Job Type**  
**VOTE** When using Capacity planning jobs and RS events are often inventory location. When a dispatcher drags the jobs onto part is request...  
tjohns servicetitan 1 day ago in Inventory Management 0
- 4** **Request for Automatic Removal of Invalid Email Address**  
**VOTE** Can there be a way for the automatic removal of email address blocked? This improvement will help maintain our email list campaigns.  
KSerobyann servicetitan 1 day ago in Marketing 1 Needs
- 3** **Rearranging Phone Numbers**  
**VOTE** I wish there was a way to easily switch primary phone number can click and drag the numbers to be in the order you want  
lwolve servicetitan about 20 hours ago in Customer and Location
- 3** **Add "Labor Type" KPI to job costing reports**  
**VOTE** Sometimes we have jobs with mixed technician teams so it is well as to finalize calculations for technicians' pay

ServiceTitan Knowledge Base

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