ServiceTitan Project Tracking Setup & Training Checklist

Resources	Links
Construction Landing Page	[Knowledge Base](#)
Budget Vs Actuals Learning Path	[Academy](#) (Self-Paced)
Progress Billing with Application for Payment	[Academy](#) (Self-Paced)
Project Tracking Overview with Product Manager	[Zoom Link](#) Password: 0#58%sj7
ServiceTitan Certified Provider Hub	Interested in a coach/consultant? Get more information [here](#)

Complete	Recommended Setup and Training Tasks(s)
☐	**Attend/Watch the Project Tracking Training Series ==(REQUIRED)==** See training links for which users should be attending each workshop. ☐ Live: [Project Tracking Setup](#) Recording: [Project Tracking Setup (#1)](#) ☐ Live: [Project Tracking Workflows](#) Recording: [Project Tracking Workflows (#2)](#)
☐	**Assign Self-Paced Academy Courses to your Project Teams - quick tip [here](#)** ☐ **[Budget vs Actuals](#)** ☐ **[Progress Billing with Application for Payment](#)** ☐ **[Dispatching Crews](#)**
☐	**New Settings Update > Project Settings (Activated with Project Tracking)** ☐ **Create Project Labels** (drag and drop to be in preferred order) [KB Article](#) ☐ **Default Preferences**: Set a default label for the different types. (Note if the PB item has a label already, then the labels used as default will not be added). ☐ **Project Setup**: *Percentage of Completion Method* should most likely be the default. Most companies using this feature will use this one, and if you want to use the Work In Progress report this is the one that works with that. ☐ **Retainage:** (*Optional for those that use it*) [KB Article](#) Create a project label for retainage that will help with reporting later.
☐	**Pricebook Setup**: (Recommendations) [KB Article](#) *Consult your Accounting/Billing Team to reduce integration errors & billing issues.* ☐ Service created for customer billing ☐ Service created for each type of labor offered (check off labor service checkbox) ☐ Average cost for labor included in Estimated Labor Cost field ☐ Apply labor labels to each type of labor (Default added via project setting > default preference) ☐ Apply material labels to each material that will be used in projects (Default added via project setting > default preference) ☐ Apply equipment labels to each equipment that will be used in projects (Default added via project setting > default preference)

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☐	**Existing Settings Review & Update**
	☐ Separate business unit(s) set up for construction (Or commercial etc) [KB Article](#)
	☐ Separate trade(s)/division(s) set up for construction (Or commercial etc)
	☐ **Settings >Technicians:**
	    ☐ Hourly pay rates added
	    ☐ Burden Rates added [KB Article](#)
	    ☐ Project Labels applied based on the type of labor performed (this is for the timesheets to have labels for the actuals on budget vs actual tables).
	☐ Job types set up for each project phase (Highly recommended)
	☐ **Settings > Project Statuses** [KB Article](#) Default statuses but can customize sub-statuses
	☐ Project labels assigned to each job type (Optional but highly recommended)
	☐ **Settings > (Invoicing) Email > Application for Payment** tab. (Used if emailing to customer)
	☐ **Settings > Application For Payment**- can set up retainage code [KB Article](#)
	☐ **Settings > Task Management > Task Types -** review your Task Types to support Project Management tasks / to-dos across your teams [KB Article](#)
	☐ **OPTIONAL: Settings > Purchasing/Inventory > Configuration > Display Services on Invoice Closeout** Evaluate if you would like Services to be available to progress bill using the Invoice Closeout functionality (Job or Project invoices). Invoice Closeout is typically used in conjunction with Requisition and Inventory Management functionality. Discuss this option with your ServiceTitan representative or your ServiceTitan Certified Provider* to ensure this tool will support your billing needs.
	
	Are you looking for a coach or consultant to assist you with the configuration, change management, implementation, and continued success of this feature-set across your organization? ServiceTitan Certified Providers are available to support you! Learn more [here](#).

☐	**Reports & Dashboards built to support your Project Reporting Needs** ☐ **Work In Progress Report:** [KB Article](#) Once it's in your account, it will show as a new dataset in custom reporting. ☐ **Project Costing Dataset** - As costing and revenue are more likely to be at a 'Project' level with Project Tracking, you may need to access and/or build reports to support your reporting needs. ☐ **Construction / Commercial Dashboard** Once it's in your account, you will be able to view a pre-built Dashboard based on Project-level datasets.
☐	**Role Permissions to ensure proper access to tools and potentially sensitive data** ☐ **Task Management** - ensure your team members have proper access to complete and manage tasks ☐ **Hide Financials** - Hides the Financials section (Budget vs Actuals) of each Project and disables the ability to create Project Invoices ☐ [**Reporting Permissions**](#) **(Templates)** ☐ WIP Project Report ☐ **Construction/Commercial Dashboard** > Share Access