



Accounting Roundup Fall 2021

Product Updates for Accounting Admins

Invoices, Statements, and Reports

Click any feature name to view the Knowledge Base article

Check out our latest enhancements designed to streamline and improve the ServiceTitan accounting experience.

These updates include content from the following releases:

ST-52

5/25/21

ST-53

7/14/21

ST-54

8/26/21

ST-55

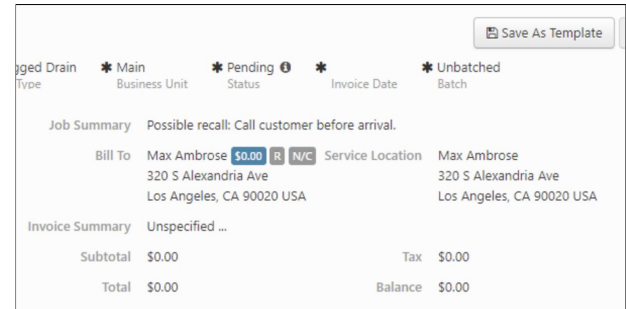
10/13/21

▶ [Easier to edit pending invoices when Managed Technician is not assigned \(ST-53\)](#)

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.

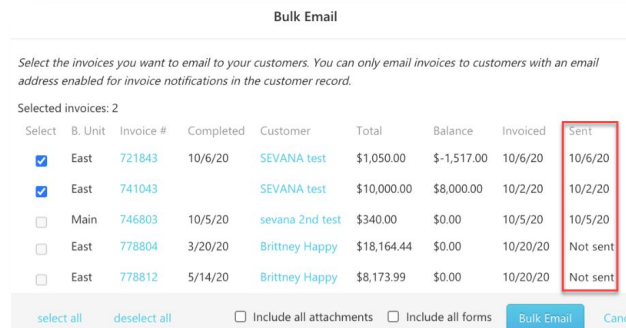
▶ [Recall, no charge, or warranty job information on invoices \(ST-53\)](#)

The **Invoice** screen displays if a job is a recall, no charge, or warranty job; no more searching the job record for that information.



▶ [Invoice sent information on Bulk Email Invoice screen \(ST-53\)](#)

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.



▶ [Totals on printed estimates are easier to understand \(ST-53\)](#)

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.

Have an idea to improve invoice, statements, or reporting in ServiceTitan? Post it in the *Ideas* section of Community to gain support from your peers and share them with our product team.



► [Enhancements added to invoice bulk print \(ST-53\)](#)

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.

► [Track emailed statements \(ST-54\)](#)

You can now track your emailed statements in one place. Run the Office Audit Trail report to find a record of all your emailed statements. Tracking statements that are already emailed to customers prevents you from sending statements to the same customer twice and helps you track customers that haven't received an emailed statement.

► [Add BCC when emailing documents \(ST-54\)](#)

You can now add BCC recipients when emailing invoices, estimates, forms, project invoices, work orders, and statements from the office or from ServiceTitan Mobile. This lets you copy emails to other team members for their review and to give visibility on customer communication. BCC addresses are visible as a hardcoded email addresses on individual emailing screens but are not visible to customers. Note: Emails sent by technicians in ServiceTitan Mobile are also sent to BCC addresses.

Email settings

Invoice
Estimate
Project
Statement
Form
E-Sign

From ⓘ

BCC ⓘ

Subject ⓘ

Accounting Reports

► [Identify adjustment invoices on the AR Transaction Report \(ST-52\)](#)

You can see adjustment invoices separately from the original invoices on the AR Transaction Report. This makes account reconciliation easier.

► [Combined Join Payment ID/Date and Invoice ID/Date in AR Transactions \(ST-55\)](#)

The Join Payment ID/Date and Invoice ID/Date columns are now one column. Before, each was in separate columns, making the report wider and harder to read on screen. This is a cleaner way for you to view the data you need when you want.