

One-Time Set Up of Equipment in ServiceTitan

8/2/2022

Steps to Add New Equipment

The screenshot displays the ServiceTitan dashboard with the following elements:

- Top Navigation Bar:** Contains icons for Dashboard, Calls, Schedule, Dispatch, Accounting, Follow Up, Reports, Marketing, and Pricebook. The **Pricebook** icon is circled in red and labeled with a red **1**.
- Left Sidebar:** Lists navigation options: Pricebook, Services, Materials, **Equipment** (circled in red and labeled with a red **2**), Categories, Templates, and Import/Export.
- Main Content Area:**
 - Equipment Section:** Includes a description: "Large installed items are considered equipment and are tied to a customer's location. Equipment can be tracked, which is useful for maintenance and replacement when multiple equipment items are at one location."
 - Buttons:** A **Mobile View** button and an **Add** button (circled in red and labeled with a red **3**) are located in the top right of the section. The **Add** button has a dropdown menu with options for **Equipment** and **Equipment Type**.
 - Search and Filters:** A search bar labeled "Search by Code, Name, Description" and a **Filters** button are present.
 - Table:** A table with columns: Name, Code, Category, Description, and Equipme.

Add an Equipment

Active



[View in Mobile](#)

Details Commission Materials Manufacturer warranty Service p

Code ⓘ ←

21/31 Characters

Name ⓘ ←

Type ⓘ

Capacity Level ⓘ

Tags ⓘ

Description ⓘ ←

Brand

Manufacturer ⓘ ←

Model ⓘ ←

Cost ⓘ

Price ⓘ

Member Price ⓘ

Add On Price ⓘ

Member Add On Price ⓘ

Hours ⓘ

Cross Sale Group ⓘ

Dimensions (HxWxD) ⓘ

SEER ⓘ

EER ⓘ

General Ledger Account ⓘ ← optional

COGS Account ⓘ ← optional

Category

Upgrades ⓘ

Recommendations ⓘ

Unit of Measure ⓘ

Taxable ⓘ ←

⚠️ Action cancelled ✕
There must be exactly one vendor selected as Primary. (Sku.Id = 11496939)

Pricebook

Services

Materials

Equipment

Categories

Price Setup

History

Pricing Builder

Templates

Import/Export

PRICEBOOK CONNECT

Catalogs

Updates

← Add an Equipment 🔴 Active

👁 View in Mobile

- Details
- Commission
- Materials
- Manufacturer warranty
- Service provider warranty
- Forms

Automatically replenish this item as it is used on invoices

Exclude from Pricebook Wizard

Images/Videos And Assets

📎 Add images/videos and PDF assets

Ideal image size 450 x 450 px.

Note: Use of images and assets will increase mobile data usage.

Videos Add

Project Label ⋮

Primary	Vendor Name	Part #	Memo	Cost	Active
No records available					

[Show/Hide Inactive Vendors](#)

Then select a "default vendor"

1. Search for Sales Builder Pro in Equipment list
2. Click 3 dots, then View/Edit Equipment

Pricebook

Services

Materials

Equipment

Categories

Templates

Import/Export

Equipment

Mobile View Add

Large installed items are considered equipment and are tied to a customer's location. Equipment can be tracked, which is useful for maintenance and replacement when multiple equipment items are at one location.

Equipment Equipment Types

1 sales builder pro Filters Edit Columns Edit Mode

Name	Code	Category	Description	Equipment
Sales Builder Pro	Sales Builder Pro 111	-	Sales Builder Pro	2

View/Edit Equipment

Read the number at the end of the URL in the address bar.

This number will be entered in the Sales Builder Pro configurations.

