Service Titan – Sales Builder Pro Workflow Cheat Sheet

1) Schedule the call in Service Titan. All Sales calls must originate in Service Titan (ST). The Customer Info, Date, and Time will be sent to Sales Builder Pro (SBP)

2) Go to the SBP Schedule. **View** the SBP schedule in the Navigation menu or use the logo shortcut on the home page. ST jobs will appear in the Assigned section of the SBP schedule.
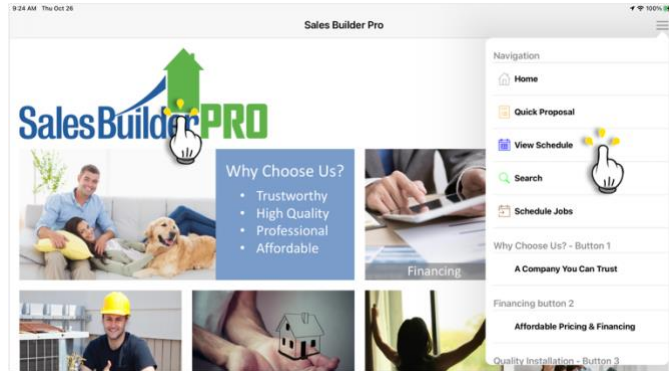

3) On the day of the Sales Call, go to the SBP Schedule, **ACCEPT** the call, **ARRIVE** , and then **PRESENT** to start building a quote. You can only build a quote on the day of the sales call. The act of starting a quote in SBP will allow you to reopen the quote at a later date.


5) Build the Quote. On the signature tab, enter a Company Signature. This is the final SAVE of the quote. All quotes with a Company signature will be sent to ST.

6) Return to View Schedule in the Navigation menu and **Complete** the sales call. When you touch **Submit** the quote information is sent to Service Titan.
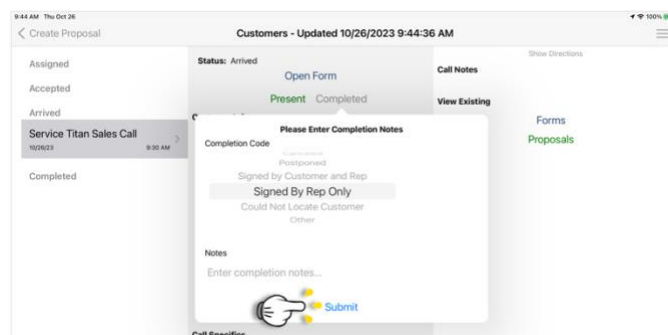
7) To reopen a quote in SBP, go to SEARCH in the Navigation menu. I find it useful to check the show obsolete quotes box in the Advanced Search menu.
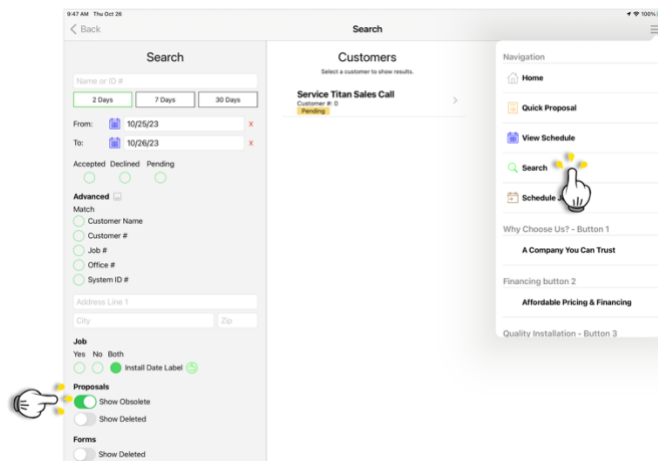
8) Reopen the quote, make your changes and **RESIGN** the quote. SBP will build a revised quote. Quotes with a Company signature will be sent to Service Titan. The original quote will become obsolete.

9) The revised quote will be sent to Service Titan the next time the app refreshes or when you touch the back button (Search) on the Signature tab.
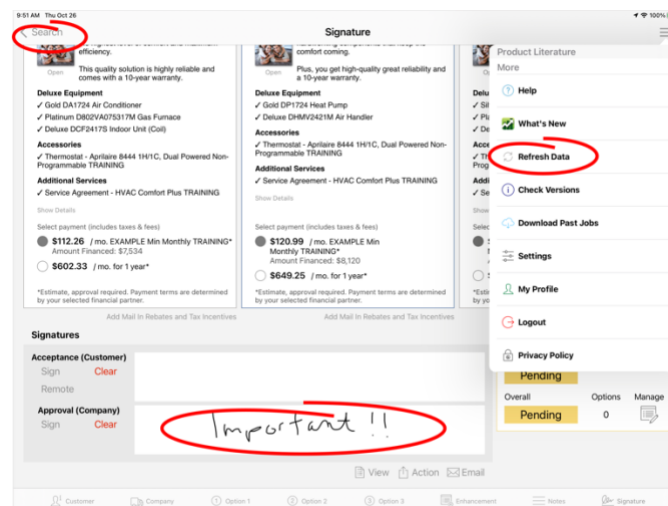
Things to keep in mind:
- All calls must be scheduled in Service Titan.
- You cannot use Quick Proposal in SBP
- You will need to "tell" Service Titan when you have arrived and completed sales calls in the Service Titan app.
- SBP does not make any changes to your Service Titan jobs.