**Garage Door Freedom New Construction Process in Service Titan**

**Every Company handles New Construction jobs slightly differently, but this general guideline will help you better understand the process for these in Service Titan. This utilizes the Project Page in Service Titan, coupled with Task Management. You will need to customize the tasks for your business, but this guide will give you a general overview.**

Create a new Location for the project (typically a phase or group of homes)

Add the specific contact information for this project on the location page and not the customer page, so you know who to contact for questions regarding this phase/jobs.

Create the Various projects for each phase and give that Project a name that corresponds to the lots covered. For Example, Phase 1 Lots 1-10.

Attach/Enter relevant information for the project. This info includes but is not limited to: Master PO from builder for that Phase, Start Date, Target Completion Date, Contract Total Value, Contracted Date, Etc.

**You can use estimate Templates on the project level if you are installing the same setup multiple times to make booking easier.**

Create **New Construction Site Check Job**. Can either create 1 job for all the lots to see if they are ready for install (ie Lots 1-10) or 1 job for each lot depending on your process.

Create task called **Office-Check In** tied to the Project (or individual job depending on your setup) to make sure the builder is ready for the site check job. (Don’t want to send a guy out to do a site check if the house isn’t built)

**Note: Depending on when in your process you order the doors, you will want to assign the Purchasing-Order Door/Parts as a task to the project if you are ordering product specifically for these new construction installs versus using items from inventory.**

Create an Install job for each lot. Each lot will have its own install job. Use custom fields **Work Lot #** and **Work Street Address** to differentiate the job locations if you are keeping them in a specific phase under a project. If you are setting up each lot as its own location, you will not need to utilize these custom fields as you will have the address in the location.

**Tip: If you set up a location for each lot with a unique address under the same builder customer, consider using the project’s name as part of the locations name in case you want to search later to see all jobs in a given project. You can currently only have 1 location tied to a given project, so this becomes important if you need roll up reporting**

Schedule the install job according to the site check and based on your install schedule.

Create a task called **Office-Check In** and schedule the due date a couple of days before the install so you can call the builder and make sure the site is clear and ready for the install.

If site is ready, complete the task for the **Office-Check In** and schedule a **New Construction Post Check** job to have your quality manager inspect the install.

**Note: If you are using the project with multiple phases, you can use just 1 check if you like or you can schedule a Post Check job for every Install Job.**