What is an FSM/CRM Integration?

First... What is an FSM?

Field Service Management (FSM) software*, often called a "CRM," is what many successful Dealers use to run their business operations more efficiently, including managing off-site workers and the resources they require to do their jobs effectively. FSMs typically include the following features:

| Service and Contract Quotation | Customer Service | Technical Support and Remote Assistance | Planning and Resource Scheduling | Field Service Execution | Finance and Logistics | KPI's and Reporting | And more! |

*Different FSM software systems may offer some or all of these features.

What is an Integration?

Integrations are features that allow information to flow between different software systems. In this case, we are sending information between Trane and a variety of FSM/CRM software solutions that Dealers are using, with the purpose of making leads, product info, pricing, availability, and much more available to Dealers directly through their FSM.

Which FSMs are in our Integration Roadmap right now?

ServiceTitan FieldEdge Housecall Pro payzer Service Fusion FieldPulse WORKIZ

TRANE®

It's Hard To Stop A Trane.

ServiceTitan Product Information & Pricing Integration – Now Available!

About the Integrations:

1. **Product information**: image, brand, model number, name, short description for parts, accessories and equipment

2. **Pricing:** DSO Dealers will need to map their equipment in ServiceTitan to receive their equipment and accessories cost (tier pricing, not promo pricing)

   See next slides for instructions

Communications:

- **July 9:** Direct to Dealer email goes out from TT with instructions to get access

- **Ongoing:** communications from TT and ServiceTitan over the coming weeks

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Step 1: Complete Account Mapping in ServiceTitan

Before accessing the Catalogs, first ensure your tier pricing for equipment and accessories is pulled in by doing the following:

1. Navigate to "Settings" > "Integrations" > "Vendor Integrations"

2. Complete Account Mapping by entering your Account information

3. Complete Equipment and Parts Mapping under "Pricebook" > "Pricebook Connect"
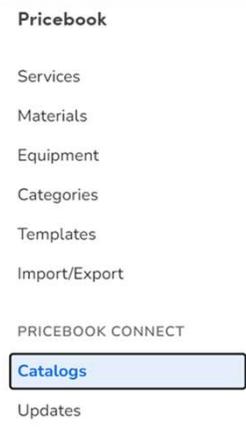

Note: parts pricing is not available at this time

Step 2: Getting Access to Catalogs

HOW?

First, Dealers should check to see if the catalogs are already available:

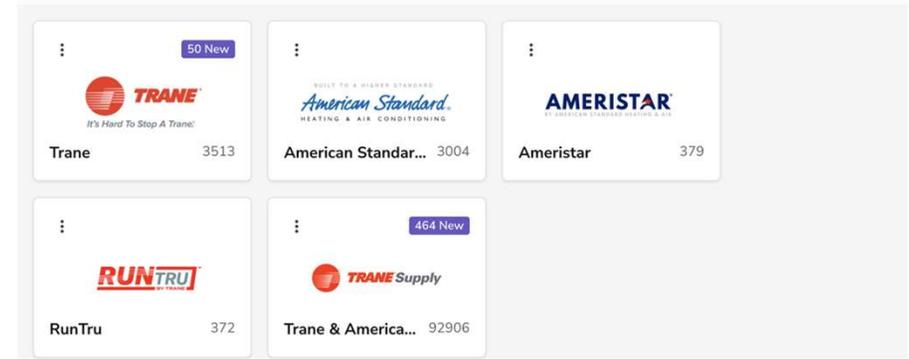1. Go to the "Pricebook" module

2. Click on "Catalogs" (on the lower left-hand side of their ServiceTitan screen)

NOTE: If the Dealer doesn't have the right catalogs appear, they can follow steps on the <u>next slide</u>.

Step 3: Add Items to Pricebook

Once Dealer has access to their catalogs, they should map and add items from the branded catalogs to their Pricebook. Then apply changes.

If the right catalogs do not appear for the Dealer in Step 2, they can easily request them from ServiceTitan using these quick steps:

Click on the appropriate Marketplace listing in ServiceTitan:

[Trane](#)
[American Standard](#)

Click on the "Get Started" button
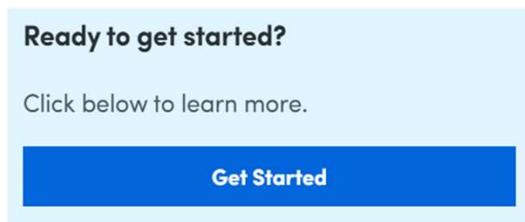
Fill out the brief form. Select "Procurement Integration" and submit.
Dealer will receive an email from ServiceTitan with instructions on how to access the integration and next steps.

Then Complete Step 3: Add Items to Pricebook and accept changes!

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What FSM integrations are available?

Leads Integrations

Service Fusion

Web Form Leads
Receive Dealer Locator "web form" leads directly to your SF account

(phone leads not available yet)

FieldEdge by xplor

Web Form Leads & Phone Leads
Receive Dealer Locator "web form" and "phone" leads directly to your FE account

(1 time activation)

ServiceTitan

Web Form Leads & Phone Leads
Receive Dealer Locator leads directly to your ST booking screen

(phone leads available through separate process)

Housecall Pro

Web Form Leads
Receive Dealer Locator "web form" leads directly to your HCP Job Inbox

(phone leads not available yet)

Other Integrations

ServiceTitan
+
pricebook PLUS

Pricebook Plus Proposal Integration
Users of PBD and ST can now finish their proposals inside ST

(set up & monthly costs)

payzer
+
WELLS FARGO

Wells Fargo Financing Quoting, Applications, and Finance Invoices
Offer promotions and complete paperwork (credit application & finance invoice) in Payzer

(costs $99/month)

ServiceTitan
+
JB WARRANTIES

JB360
Two-way integration allowing Dealers to access warranty plans and claims data directly from ServiceTitan.

Product and Pricing Integrations

ServiceTitan
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Product and Pricing
Access up-to-date model numbers, images, basic descriptions in ST to build homeowner proposals, more…

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Leads Integration:
What's in it for Dealers?

Easy to Use

- Web Form Leads from branded websites appear directly in your FSM/CRM account (for FieldEdge users, phone leads will appear too).

100% Disposition Score

- Receive 100% of your Disposition score, which currently makes up a large portion of your overall Dealer Locator Score.

Save Time & Eliminate Errors

- No need to disposition leads in Dispatch to meet the Disposition Score requirement.
- No more copying and pasting lead info from Dispatch emails over to your FSM/CRM booking screen.

Download our one pager on the Leads Integration!

ServiceTitan

"Auto populating this information minimizes the margin of error and saves us from having to enter data twice. It's easier to stay in ServiceTitan and not have to go to one more portal..." - **Blue Frost Heating and Cooling**

FieldEdge

"Leads Integration has made scheduling Trane Leads infinitely easier. The leads automatically generate and input the customers information into FieldEdge which avoids any mix ups with addresses, phone numbers, even spelling a customer's name correctly..." - **Cool Change**

It's Hard To Stop A Trane.

How does a Dealer turn on the integration feature?

CONTACT A REP
- **Phone:** Contact your account rep
- **Email:** support@fieldedge.com
- **Chat:** Help Center

CONTACT A REP
- **Phone:** 888 902 0304 > Option 2
- **Email:** support@servicefusion.com
- **Chat:** Help button at the bottom right corner of any Service Fusion window

SELF SERVE
1. In ServiceTitan, go to Settings>Integrations>Marketing Integrations
2. Sign the data authorization form
3. Pair your account and configure your business units and job type mappings