

How to Create a Membership in ServiceTitan

This guide walks you through how to create a membership in ServiceTitan, from naming the membership type to configuring billing, sales tasks, recurring services, and revenue recognition. Follow each step in order to build a fully functional membership offering, such as a Gold Plumbing Membership billed annually with recurring service visits.

Prerequisites

Before you create a membership in ServiceTitan, review the following requirements so your setup meets your organization's goals:

- The membership is an ongoing membership billed annually.
- A blanket membership discount of 10% applies.
- A new custom sales task is needed to sell the membership.
- The recurring service uses an invoice template that charges \$100 per visit.
- The recurring service is set to recur every 6 months.
- The first visit must **not** be marked as already complete.
- Membership revenue is recognized at the point of sale.

Keep these requirements in mind as you work through the setup.

The screenshot shows a software interface for managing membership types. On the left is a sidebar with a search bar containing 'member' and navigation links for 'Operations', 'Custom Follow Up', 'Invoicing', and 'Membership Types'. The main area is titled 'Membership Types' with a subtitle 'Create and edit membership types to manage your service agreement programs, membership discounts, billing frequency, and more.' and a 'Learn more' link. Below this are buttons for 'Create Membership Type', 'Activate', and 'Deactivate'. A table lists membership types with columns for checkboxes, Name, Billing and Duration, Status, and an Edit link. One entry, 'Gold Annual Membership', is shown with 'Upfront - 12 Months' duration and 'Active' status. A pagination bar indicates '1 - 1 of 1 items'. A notes app window is overlaid on the table, displaying a checklist of requirements for an ongoing membership, including annual billing, 10% discount, custom sales tasks, recurring service with a \$100 per visit invoice template, 6-month recurrence, and revenue recognition at the point of sale. The notes app window also shows a date and time stamp: 'June 22, 2023 at 5:26 PM'.

☐	Name	Billing and Duration	Status	
☐	Gold Annual Membership	Upfront - 12 Months	Active	Edit

1 - 1 of 1 items

June 22, 2023 at 5:26 PM

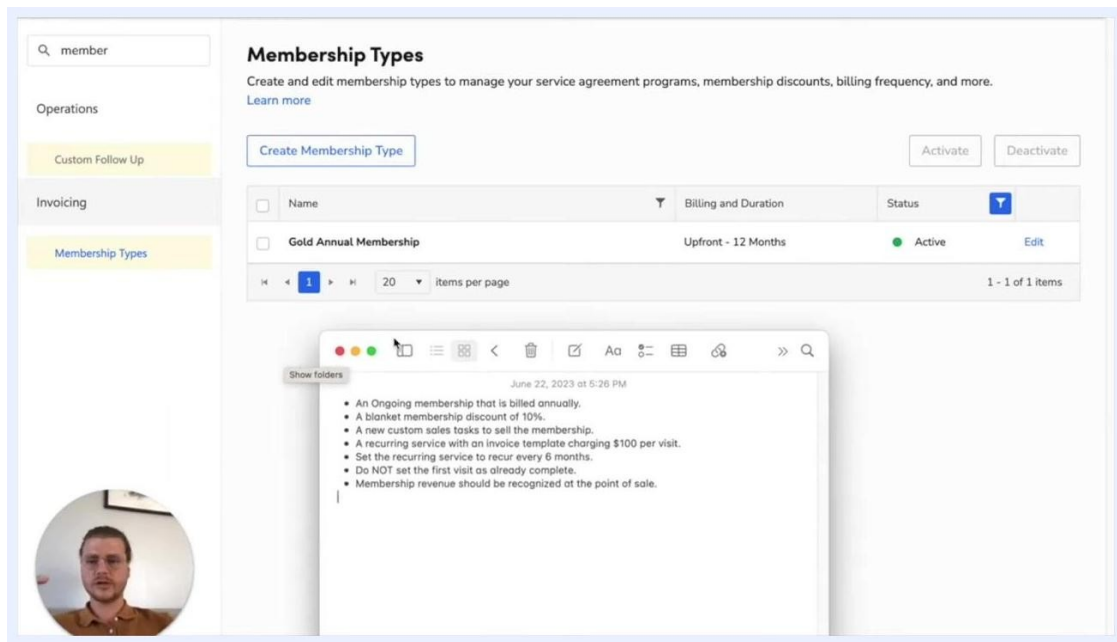
- An Ongoing membership that is billed annually.
- A blanket membership discount of 10%.
- A new custom sales tasks to sell the membership.
- A recurring service with an invoice template charging \$100 per visit.
- Set the recurring service to recur every 6 months.
- Do NOT set the first visit as already complete.
- Membership revenue should be recognized at the point of sale.

Membership Types screen with a constraints checklist open in a notes app

Membership types

Step 1: Navigate to Membership Types

Go to the left sidebar and select **Membership Types** under the **Invoicing** section. This displays a list of existing membership types. Click **Create Membership Type** to begin setting up a new membership.



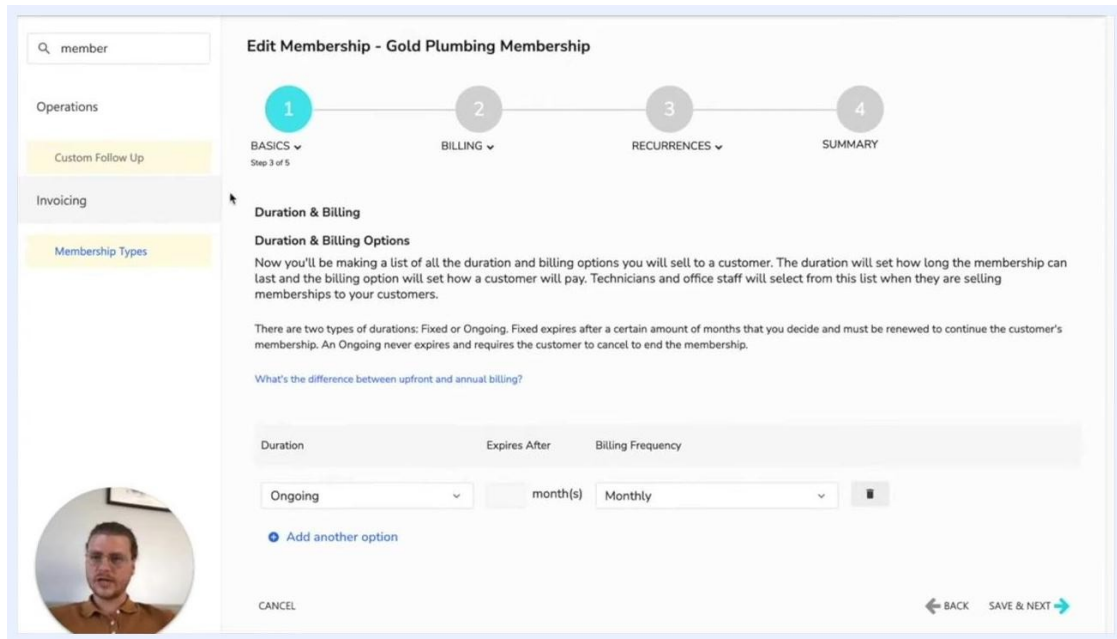
Membership Types screen with the "Create Membership Type" button and existing memberships listed

Step 2: Name the membership

When prompted, enter a name for the new membership type. For this example, enter **Gold Plumbing Membership**. Click **Save & Next** to continue.

Step 3: Add a tag to the membership

Assign a tag to the membership so it's easier to identify and filter later. In the **Tags** section, select or create a tag — for this example, add a **Maintenance** tag. Click **Save & Next** to proceed.



Edit Membership screen showing the tag selection dropdown and the Save & Next button

Duration and billing

Step 4: Configure duration and billing settings

In the **Duration & Billing** section, set the following:

- **Duration:** Select **Fixed**.
- **Expires After:** Enter **12** months.
- **Billing Frequency:** Select **Annually**.

This configuration ensures the membership lasts 12 months and is billed once per year. Click **Save & Next** to continue.

member

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Membership Types

Edit Membership - Gold Plumbing Membership

1 BASICS Step 3 of 5 2 BILLING 3 RECURRENCES 4 SUMMARY

Duration & Billing

Duration & Billing Options

Now you'll be making a list of all the duration and billing options you will sell to a customer. The duration will set how long the membership can last and the billing option will set how a customer will pay. Technicians and office staff will select from this list when they are selling memberships to your customers.

There are two types of durations: Fixed or Ongoing. Fixed expires after a certain amount of months that you decide and must be renewed to continue the customer's membership. An Ongoing never expires and requires the customer to cancel to end the membership.

[What's the difference between upfront and annual billing?](#)

Duration	Expires After	Billing Frequency
Fixed	12 month(s)	Annually

[Add another option](#)

CANCEL [BACK](#) [SAVE & NEXT](#)

Edit Membership screen with Duration set to Fixed, Expires After set to 12 months, and Billing Frequency set to Annually

Step 5: Set up the membership discount

In the **Discount** section, apply a blanket discount across all services. Check the box to **Show membership savings on customer invoices**, then set the discount to **10%** for all services. Click **Save & Next** to proceed.

Search member

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Edit Membership - Gold Plumbing Membership

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Duration & Billing

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[What's the difference between upfront and annual billing?](#)

Duration	Expires After	Billing Frequency
Fixed	12 month(s)	Annually

[Add another option](#)

CANCEL [BACK](#) [SAVE & NEXT](#)

Discount configuration screen with the 10% discount highlighted against the constraints checklist

Step 6: Configure membership pricing table usage

On the **Edit Membership - Gold Plumbing Membership** screen, under the **BILLING** step, answer the following:

- **Do you want to use the membership pricing table to set prices on invoices and estimates?** Select **Yes**.
- **Do you sell a membership for the same amount that you bill a membership?** Select **Yes**.
- **Do you renew a membership for the same price you sell the initial membership?** Select **Yes**.

This ensures pricing stays consistent and is managed centrally through the price book.

member

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Edit Membership - Gold Plumbing Membership

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Create Prices

Create Prices

Do you want to use the membership pricing table to set prices on invoices and estimates?

☒ Yes ☐ No

You are now going to determine a price for each of the billing and duration combinations you created. These will be the prices on an invoice or estimate when the sale task is added and billing and duration selections are made.

Do you sell a membership for the same amount that you bill a membership?

☒ Yes ☐ No

Do you renew a membership for the same price you sell the initial membership?

☒ Yes ☐ No

Billing Frequency	Duration	Sale Price	Billing Price	Renewal Price
Annual	12 months	\$ 0.00	\$ 0.00	\$ 0.00

Edit Membership screen showing pricing table options with radio buttons selected for "Yes"

New sale tasks

Step 7: Create a new sales task for the membership sale

In the **New Sale Tasks** section, click **Create New Task** to add a custom sales task for selling the membership. In the **Add Sale Task** dialog:

- Enter **Membership Sold** for both the **Code** and **Name** fields.
- Enter **New Membership** in the **Item Description** field.
- Check **Taxable**, **Allow Discounts Codes**, and **Allow Membership Discounts**.
- Set the **Price** to **100.00**.
- Set the **General Ledger Account** to **Revenue**.
- Leave other fields as default unless your organization requires additional details.

Click **Save** to add the new sales task.

The screenshot shows a web application interface for editing a membership. On the left is a sidebar with a search bar containing 'member', and two sections: 'Operations' with a 'Custom Follow Up' button, and 'Invoicing' with a 'Membership Types' button. The main content area is titled 'Edit Membership - Gold Plumbing Membership' and features a progress bar with four steps: 1. BASICS, 2. BILLING (active, Step 2 of 4), 3. RECURRENCES, and 4. SUMMARY. Below the progress bar, the 'New Sale Tasks' section explains that these are pricebook service items used to sell memberships. It includes instructions to select an existing task or create a new one. A 'Sale Task Code' dropdown menu is open, showing a search bar with the placeholder 'Search Sale Task Code' and a message 'No results found'. At the bottom of the main area are 'CANCEL' and 'SAVE & NEXT' buttons. A circular profile picture of a man is visible in the bottom left corner of the sidebar.

Add Sale Task dialog with Membership Sold, New Membership, \$100 price, and the Revenue account selected

Step 8: Assign the sales task to the membership

After saving, confirm the new sales task (for example, **MMBRSH**) appears in the **Sale Task Code** field. Click **Save & Next** to proceed.

Search member

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Edit Membership - Gold Plumbing Membership

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New Sale Tasks

New sale tasks are pricebook service items used to sell memberships. Adding a new sale task to an invoice activates the membership.

Select an existing task or create a new one for this membership so that technicians can locate it in your pricebook.

If you set prices in the membership pricing table, you don't need to add a price to the new sale task.

Sale Task Code

MMBRSH x

OR

Create New Task

CANCEL

← BACK SAVE & NEXT →

Edit Membership screen with the new sales task code assigned and Save & Next highlighted

Step 9: Set up the renewal task

In the **Renewal Tasks** section, use the search bar to find and select the renewal task. For this example, select **Gold Points**. You can also create a new renewal task if needed. Click **Save & Next** to continue.

The screenshot shows the 'Edit Membership - Gold Plumbing Membership' interface. On the left, a sidebar contains a search bar with 'member' and two sections: 'Operations' with a 'Custom Follow Up' button, and 'Invoicing' with a 'Membership Types' button. The main content area is titled 'Edit Membership - Gold Plumbing Membership' and features a progress bar with four steps: 1. BASICS, 2. BILLING (selected), 3. RECURRENT, and 4. A fourth step. Below the progress bar, the 'Billing Template' section explains that the membership billing template is an invoice template for creating recurring customer bills. It includes a text input field for 'Select Billing Template' and a yellow warning box stating 'Please select or create a billing template before continuing.' A 'CANCEL' button is at the bottom left. On the right, a panel displays a list of tasks for 'June 22, 2023 at 5:26 PM':

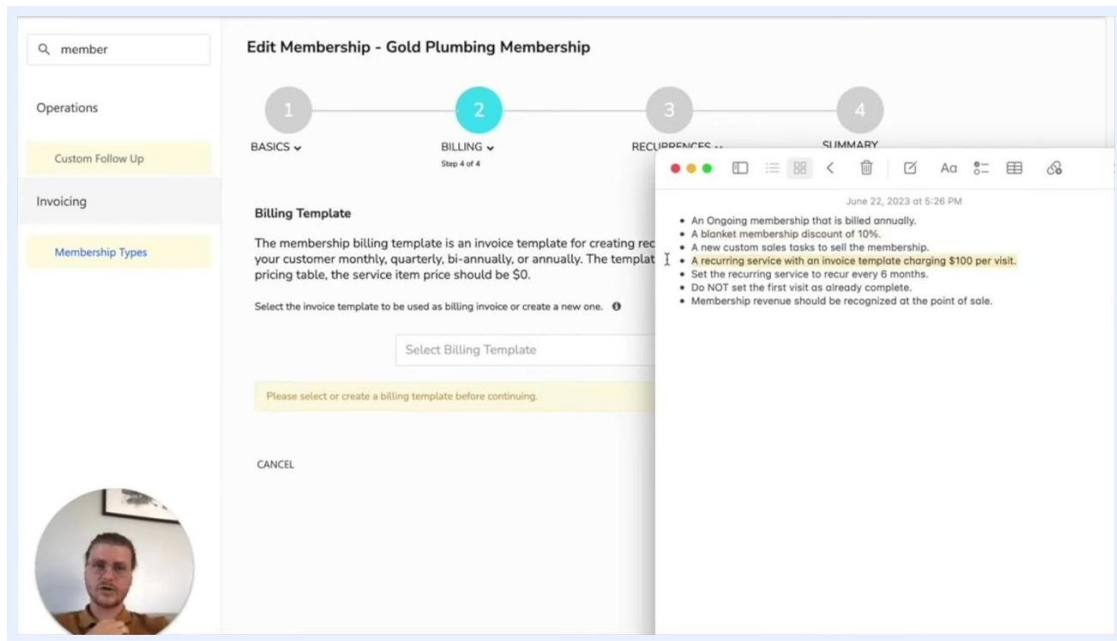
- An Ongoing membership that is billed annually.
- A blanket membership discount of 10%.
- A new custom sales tasks to sell the membership.
- A recurring service with an invoice template charging \$100 per visit.
- Set the recurring service to recur every 6 months.
- Do NOT set the first visit as already complete.
- Membership revenue should be recognized at the point of sale.

Renewal Tasks screen with Gold Points selected as the renewal task

Billing template

Step 10: Select or create a billing template

In the **Billing Template** section, review the instructions: the billing template is used to create recurring billing invoices, and it should include a service item priced at \$0 if you're using the pricing table. Select an existing invoice template, or create a new one, to serve as the billing invoice for recurring services. Make sure the template charges **\$100 per visit** as required. You must select or create a billing template before proceeding.



Billing Template selection screen with the membership constraints checklist visible

Step 11: Create the billing invoice template and add the service charge

On the **Billing Template** screen for the Gold Plumbing Membership, click **Create Billing Template** if a suitable template doesn't already exist. In the **Billing Invoice Template** window, under **Services**, click **Select a Service**:

- In the search bar, type **tune**.
- Select **Panel Tune-Up (Up to 20 Circuits)** with code **PAN-410** from the dropdown.
- Set the **Unit Price** to **\$100.00** and **Quantity** to **1**.
- Confirm the **Total Price** shows **\$100.00**.

Click **Save & Next** to proceed. This ensures every recurring service invoice includes a \$100 charge for the panel tune-up.

Search member

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Edit Membership - Gold Plumbing Membership

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Billing Template

The membership billing template is an invoice template for creating recurring billing invoices. The template includes a service item used to bill your customer monthly, quarterly, bi-annually, or annually. The template should only include one service item. If you set prices in the membership pricing table, the service item price should be \$0.

Select the invoice template to be used as billing invoice or create a new one.

SERVICE	PRICE	QTY
Panel Tune-Up (Up to 20 Circuits) PAN-410	\$100.00	1.00

Total: \$100.00

CANCEL

← BACK SAVE & NEXT →

Billing Template screen with the Panel Tune-Up service added, \$100 price, and Save & Next highlighted

Recurring services

Step 12: Configure recurring service basics

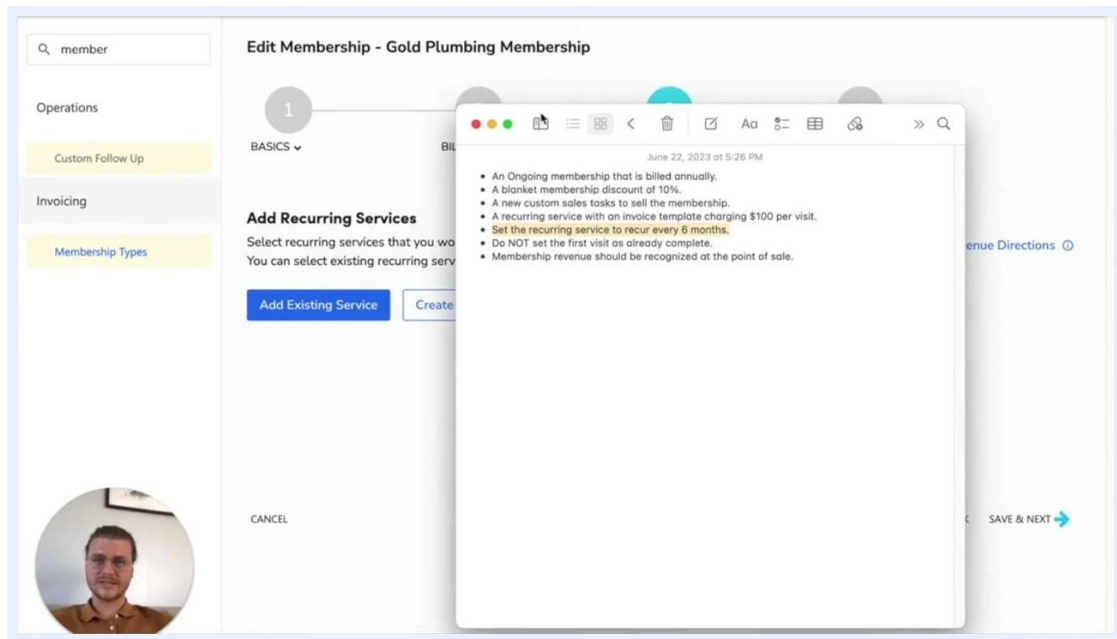
On the membership configuration page, enter the recurring service details. In the **Recurring Service Basics** section:

- Enter **Gold Plumbing Membership** as the **Name** and **Display Name**.
- Leave **Tags** blank or add as needed.
- Select the invoice template you just created from the **Invoice Template** dropdown.

In the **Job Type Details** section:

- For **Business Unit**, select **HVAC - Maintenance**.
- For **Job Type**, search for and select **Tune Up**.
- For **Campaign**, select the appropriate campaign (for example, "Angie's List" or "Direct Mail").
- Set **Priority** to **Normal**.

- In **Job Summary**, enter a default summary such as "This is a tune-up. This will be what is populated into the tune-up section."



Recurring Service Basics and Job Type Details screen with fields for Name, Invoice Template, Business Unit, Job Type, Campaign, and Priority

Step 13: Set the recurrence type

In the **Scheduling Settings** section, locate the **Recurrence Type** dropdown and select **Monthly**. This determines that the service recurs every month before the interval is applied.

The screenshot displays a software interface with a sidebar on the left containing navigation links: 'member', 'Operations', 'Custom Follow Up', 'Invoicing', and 'Membership Types'. The main content area is titled 'Invoice Template' and includes a 'Tune Up' section with a 'Clear' button. Below this is a table with columns 'SERVICE', 'PRICE', and 'QTY'. The table lists 'Precision Tune-up and Cleaning - A/C or H/P' with a price of \$0.00 and quantity of 1.00, and 'Gold Points' with a price of -\$100.00 and quantity of 1.00. The total is -\$100.00. The 'JOB TYPE DETAILS' section includes dropdowns for 'Business Unit' (HVAC - Maintenance), 'Job Type' (No Heat), 'Campaign' (Select Campaign), and 'Priority' (Normal). The 'Job Summary' field contains the text 'This is a tune up'. The 'SCHEDULING SETTINGS' section includes dropdowns for 'Recurrence Type' (Monthly), 'Recurrence Interval' (1), and 'Duration Type' (Continuous). A checkbox labeled 'First visit already complete' is also present.

SERVICE	PRICE	QTY
Precision Tune-up and Cleaning - A/C or H/P TU-110	\$0.00	1.00
Gold Points	-\$100.00	1.00
Total: -\$100.00		

JOB TYPE DETAILS

Business Unit: HVAC - Maintenance x v Job Type: No Heat x v Campaign: Select Campaign v Priority: Normal v

Job Summary

This is a tune up

SCHEDULING SETTINGS

Recurrence Type: Monthly v Recurrence Interval: 1 v Duration Type: Continuous v

☐ First visit already complete
If the first service was performed at the time of purchase, you can check this box to make sure the customer doesn't receive an extra visit.

Screen showing Recurrence Type set to Monthly, Recurrence Interval set to 1, and Duration Type set to Continuous, with Business Unit, Job Type, and Job Summary fields also visible

Step 14: Specify the recurrence interval

In the **Recurrence Interval** field, enter **6**. This means the recurring service occurs every 6 months.

Step 15: Set the duration type

In the **Duration Type** dropdown, select **# of Total Visits**. In the **# of Visits** field, enter **2**. This specifies that the membership includes a total of 2 visits.

The screenshot displays the 'Invoice Template' section for a 'Tune Up' service. It includes a table with the following items:

SERVICE	PRICE	QTY
Precision Tune-up and Cleaning - A/C or H/P	\$0.00	1.00
Gold Points	-\$100.00	1.00
Total: -\$100.00		

Below the table, the 'JOB TYPE DETAILS' are configured as follows:

- Business Unit: HVAC - Maintenance
- Job Type: No Heat
- Campaign: Select Campaign
- Priority: Normal

The 'SCHEDULING SETTINGS' section shows the following configuration:

- Recurrence Type: Monthly
- Recurrence Interval: 6
- Duration Type: # of Total Visits
- # of Visits: 2

A checkbox labeled 'First visit already complete' is also present, with a note: 'If the first service was performed at the time of purchase, you can check this box to make sure the customer doesn't receive an extra visit.'

Screen showing Recurrence Type set to Monthly, Recurrence Interval set to 6, Duration Type set to # of Total Visits, and # of Visits set to 2

Step 16: Review and finalize the recurring service setup

Review all entered details for accuracy:

- Name: **Gold Plumbing Membership**
- Invoice Template: **Tune Up** (or the template you created)
- Service: **Panel Tune-Up (Up to 20 Circuits)**, \$100 per visit
- Recurrence: **Every 6 months**
- Business Unit: **HVAC - Maintenance**
- Job Type: **Tune Up**
- Priority: **Normal**
- Job Summary: "This is a tune-up. This will be what is populated into the tune-up section."

Save the recurring service to complete this part of the configuration.

member

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Tune Up Clear

SERVICE	PRICE	QTY
Precision Tune-up and Cleaning - A/C or H/P TU-110	\$0.00	1.00
Gold Points Gold Points	-\$100.00	1.00
Total: -\$100.00		

JOB TYPE DETAILS

Business Unit: HVAC - Maintenance x v Job Type: No Heat x v Campaign: Select Campaign v Priority: Select Priority v

Job Summary

SCHEDULING SETTINGS

Recurrence Type: Monthly Recurrence Interval: 1

☐ First visit already complete
If the first service was performed at the time of purchase, you can check this box to make sure the customer doesn't receive an extra visit.

Angie's List
AT&T
Business Card
Copy of Jamilah's Campaign
Direct Mail
Example - Aging Equipment - Automation
Example - Aging Equipment - Automation

Recurring Service configuration screen with all fields filled in, including campaign and priority

Step 17: Add recurring services

On the **Add Recurring Services** screen, click **Create New Service** if you need to define a new recurring service for this membership. Reference your checklist to confirm the service recurs every 6 months, and make sure the first visit is **not** marked as already complete.

Search member

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Edit Membership - Gold Plumbing Membership

1 BASICS 2 BILLING Step 4 of 4 3 RECURRENCES 4 SUMMARY

Billing Template

The membership billing template is an invoice template for creating recurring billing invoices. The template includes a service item used to bill your customer monthly, quarterly, bi-annually, or annually. The template should only include one service item. If you set prices in the membership pricing table, the service item price should be \$0.

Select the invoice template to be used as billing invoice or create a new one. ⓘ

SERVICE	PRICE	QTY
Panel Tune-Up (Up to 20 Circuits) PAN-410	\$100.00	1.00

Total: \$100.00

CANCEL

← BACK SAVE & NEXT →

Add Recurring Services screen with the checklist visible, highlighting "Set the recurring service to recur every 6 months"

Review the listed recurring service (for example, "Gold Plumbing Membership"). If needed, click **Add Existing Service** or **Create New Service** to add more services. Confirm the **Revenue Allocation** is set as desired (for example, "Divide Evenly (100%)"), then click **Save & Next** to proceed.

Add Recurring Services step showing Gold Plumbing Membership listed, with options to Add Existing Service or Create New Service

Revenue recognition

Step 18: Configure revenue recognition

On the **Revenue Recognition** screen, answer whether membership revenue is recognized at the point of sale or deferred:

- Select **Point of sale** to recognize revenue immediately.
- Select **Deferred** to recognize revenue over time. Choosing **Deferred** reveals additional options, including whether ServiceTitan should calculate deferred revenue automatically, whether revenue should be divided evenly between each recurring service, and how to recognize deferred revenue when dismissing a recurring service event.

For this example, select **Point of sale**.



Revenue Recognition screen with Point of Sale selected

Step 19: Save and complete the setup

Click **Save & Next** to finalize the configuration and proceed to the summary.

What's next

With these steps complete, your Gold Plumbing Membership is set up with a recurring service that charges \$100 every six months, along with the business, job, and scheduling details defined in your checklist. Review the membership summary to confirm all settings match your requirements before making the membership available for sale.