# How to Create an Estimate in ServiceTitan

This guide walks you through how to create an estimate in ServiceTitan using the redesigned Office Estimates interface. You'll learn how to launch the estimate builder from a job record, choose a proposal template or start from scratch, add tasks, equipment, and materials, and use advanced tools like keyboard shortcuts and inline editing to manage your estimate efficiently.

## Prerequisites

- Access to the ServiceTitan platform with permission to create estimates on a job.
- An existing job record to attach the estimate to.
- If testing, confirm you are working in a sandbox environment (indicated by a red banner at the top of the screen) rather than in production.

## Step 1: Open the job record

Navigate to the job for which you want to create an estimate and confirm you are in the correct job record. For example, you might be working on a job such as **AC Maintenance Under Memberships** in Beverly Hills.

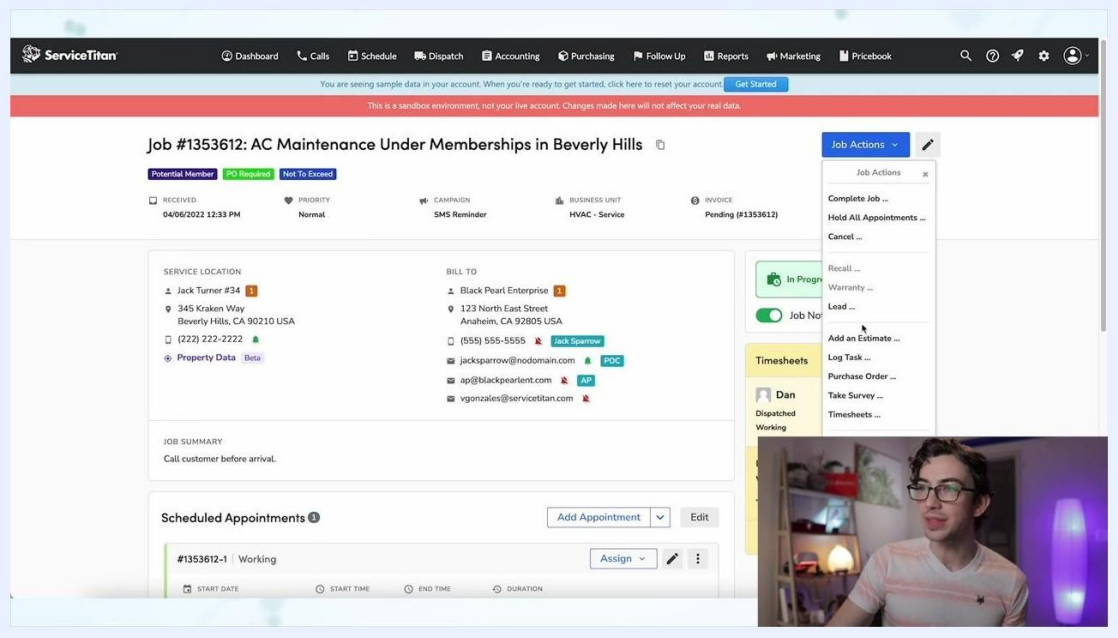
## Step 2: Start the estimate creation process

Click the **Job Actions** dropdown menu in the upper right section of the job record, then select **Add an Estimate** from the list.

## Step 3: Choose a proposal template or build from scratch

A **Build Estimate(s)** modal window appears. Select the appropriate business unit (for example, **HVAC - Service**) from the dropdown, then search for and select a pre-built proposal template if you want to use one.

Hover over the number of estimates to see a breakdown of what each template includes, such as Bronze, Silver, Gold, and Platinum options with their associated system types and prices. If you prefer not to use a template, click **Build Estimate** to start from scratch.



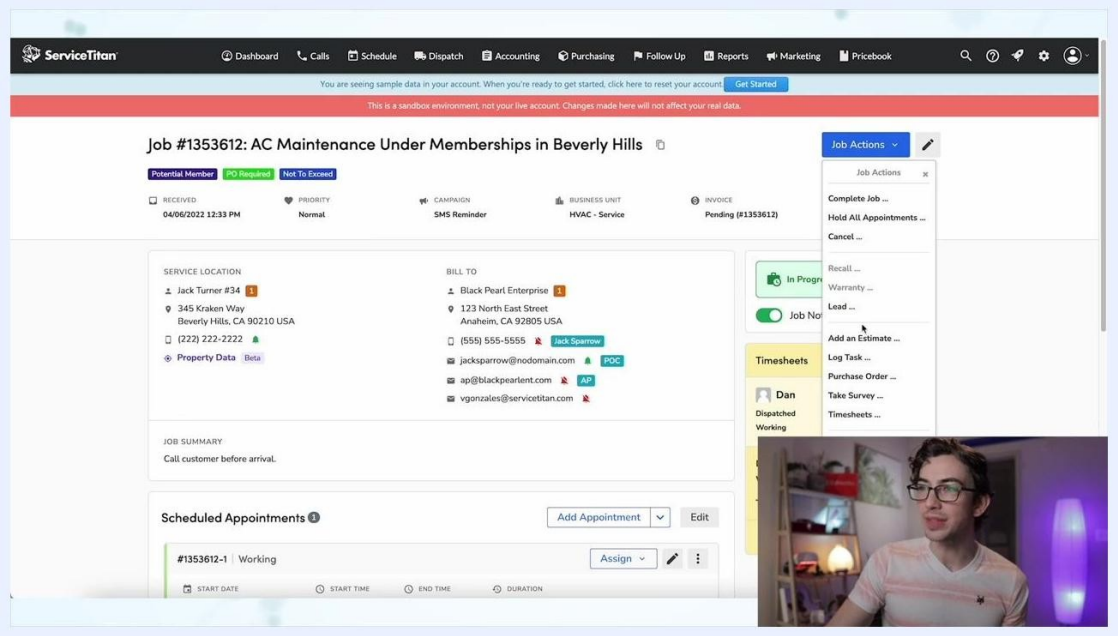

**Build Estimate(s) modal showing template options and a price breakdown**

## Step 4: Enter estimate details

On the **Create Estimate** page, fill in the following fields:

- **Name**: Enter a name for your estimate.
- **Approximate Start Date** and **Approximate End Date**: Enter the relevant dates.
- **Summary**: Provide a summary of the estimate.

Review the customer and location information shown on the page to confirm it's accurate.

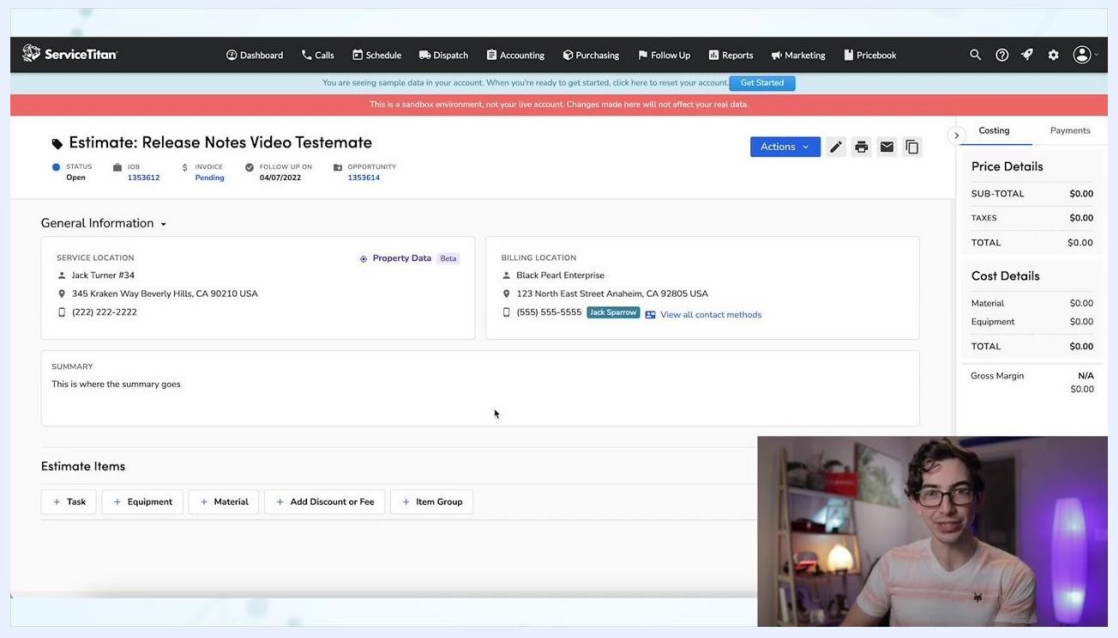



**Create Estimate screen with fields for name, dates, and summary**

## Step 5: Configure pricing and sales information

In the **Price Details** section, set your **Follow Up On** date and select a **Rate Sheet** if you're using customer-specific pricing. This field may not appear depending on your account configuration. The **Subtotal**, **Tax**, and **Total** fields auto-calculate based on the items you add later.

In the **Sale Information** section, choose the employee to mark as **Sold By**.




**Price Details and Sale Information sections with rate sheet and follow-up date fields**

## Step 6: Create the estimate

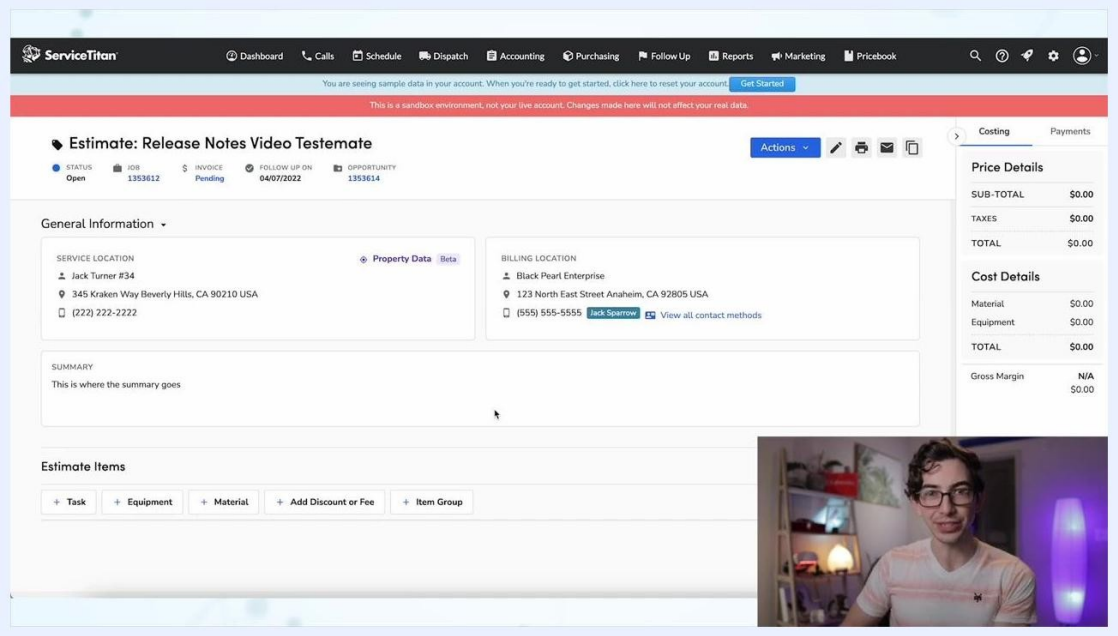
After entering all required information, click **Create** to proceed to the estimate building screen.

## Step 7: Add estimate items

On the estimate building screen, use the available buttons to add different item types:

- **Task**
- **Equipment**
- **Material**
- **Add Discount or Fee** (if enabled)
- **Item Group** (if enabled)

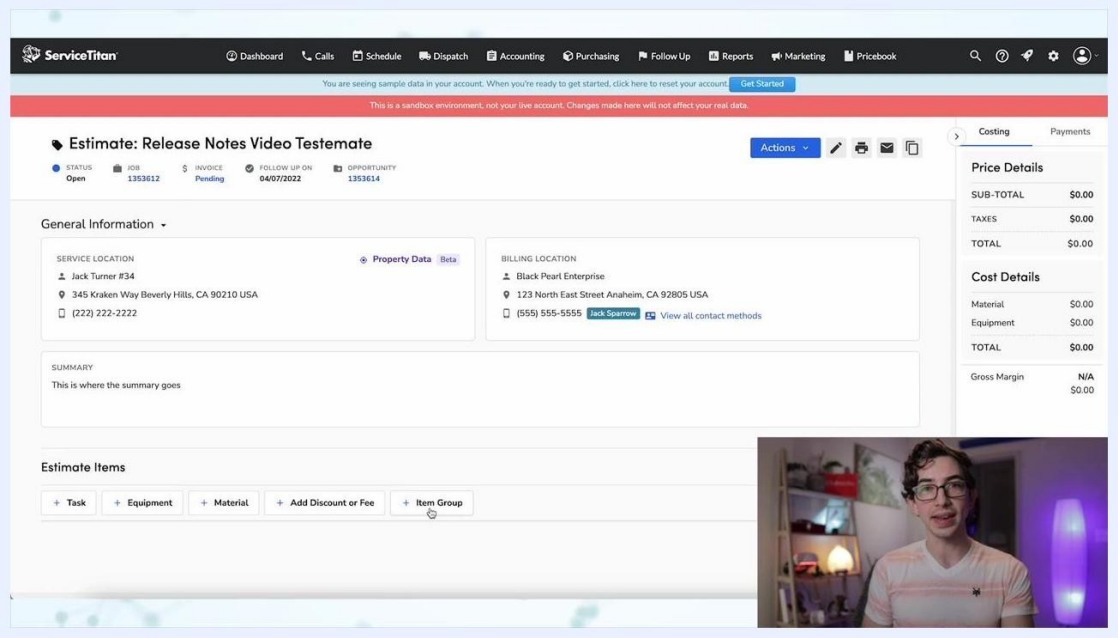
Item groups were previously only available on mobile or through estimate templates. Now you can build item groups directly from the office interface.




**Estimate building screen with options to add Task, Equipment, Material, Discount or Fee, and Item Group**

## Step 8: Build item groups (if enabled)

Click **+ Item Group** to create a new item group directly from the office interface. This feature may or may not be enabled for your account.

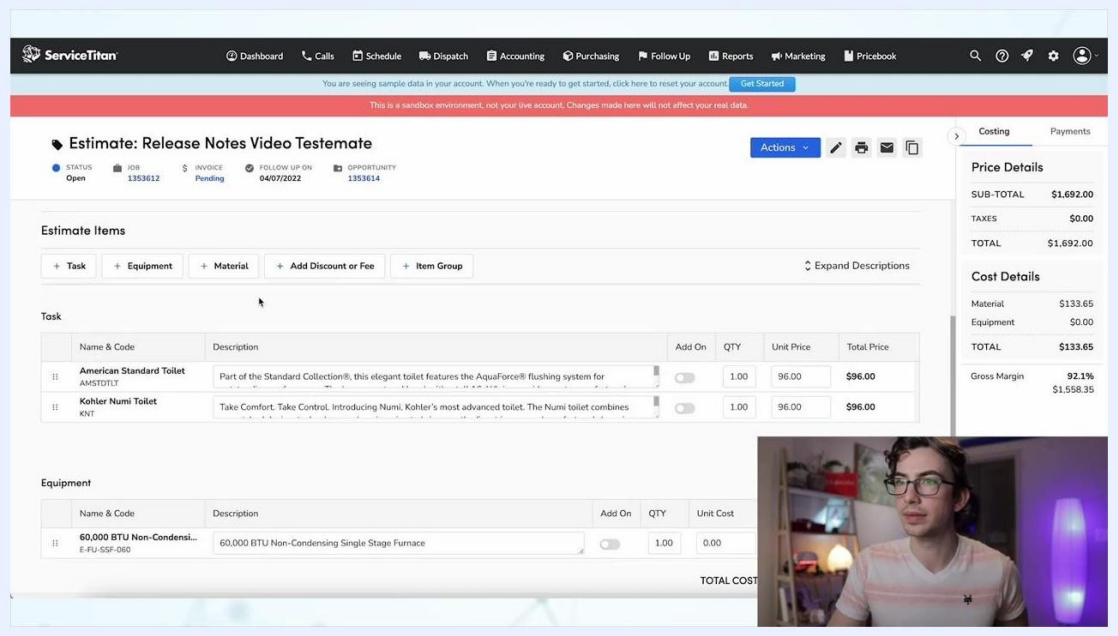



**Estimate building screen with the cursor positioned over the "+ Item Group" button**

## Step 9: Review and organize estimate items

Add and organize items as needed. Items are automatically separated by type, such as Tasks, Equipment, and Material. For example, you might add Task items like an American Standard Toilet (AMSTDTLT) or a Kohler Numii Toilet (KNT), and Equipment items like a 60,000 BTU Non-Condensing Single Stage Furnace (E-FU-SSF-060).

Review the cost and price details on the right side of the screen, including subtotal, taxes, total, material cost, equipment cost, and gross margin.




**Estimate screen with example items separated by type, showing cost and price details**

## Step 10: Monitor price and cost details in the side panel

The right-side panel updates in real time as you build your estimate, showing:

- **Price Details**: Sub-total, Taxes, and Total.
- **Cost Details**: Material cost, Equipment cost, and Total cost.
- **Gross Margin**: Shown as both a percentage and a dollar amount.

Use this panel to track profitability as you add items to the estimate.

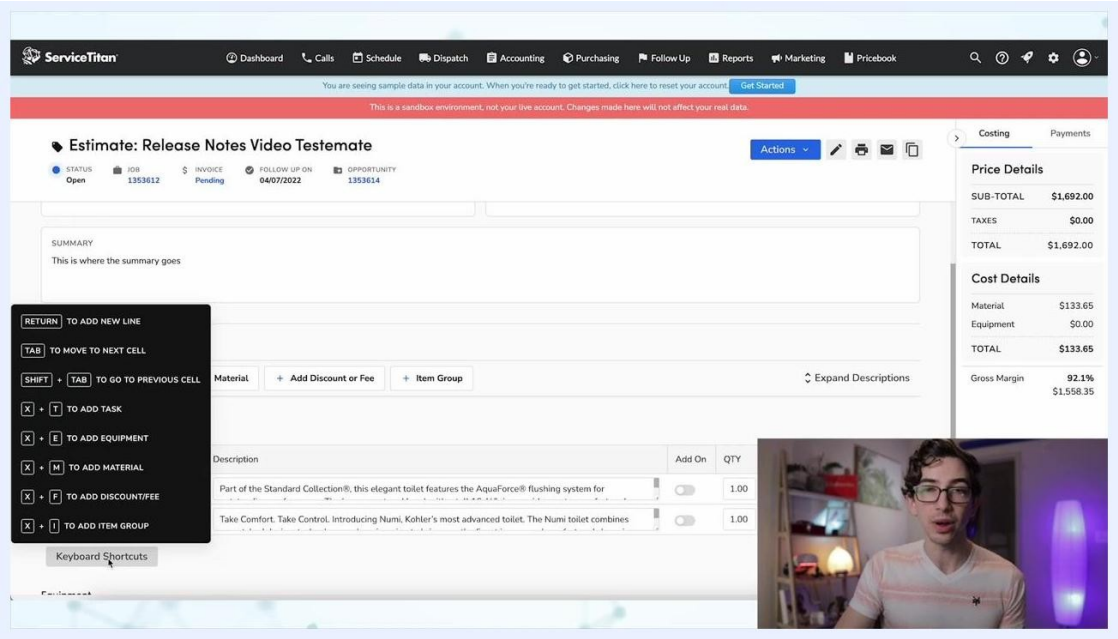
## Step 11: Use keyboard shortcuts for line items

Click into any line item within the estimate to reveal the keyboard shortcuts panel. Available shortcuts include:

- **RETURN**: Add new line
- **TAB**: Move to next cell
- **SHIFT + TAB**: Move to previous cell
- **X + T**: Add Task
- **X + E**: Add Equipment

- **X + M**: Add Material
- **X + F**: Add Discount/Fee
- **X + I**: Add Item Group

Use these shortcuts to streamline your workflow and keep your hands on the keyboard.



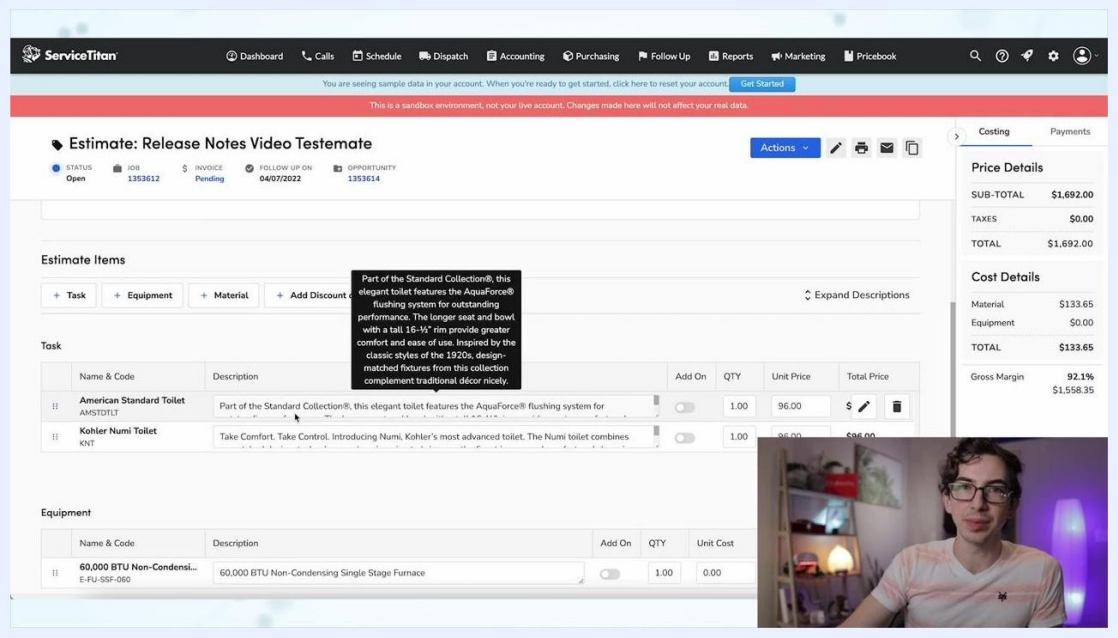

**Estimate screen with the keyboard shortcuts panel open, listing all shortcuts for line item editing**

## Step 12: View the Payments tab

Click the **Payments** tab in the side panel to view payment information. If the estimate hasn't been sold yet, this tab will be empty.

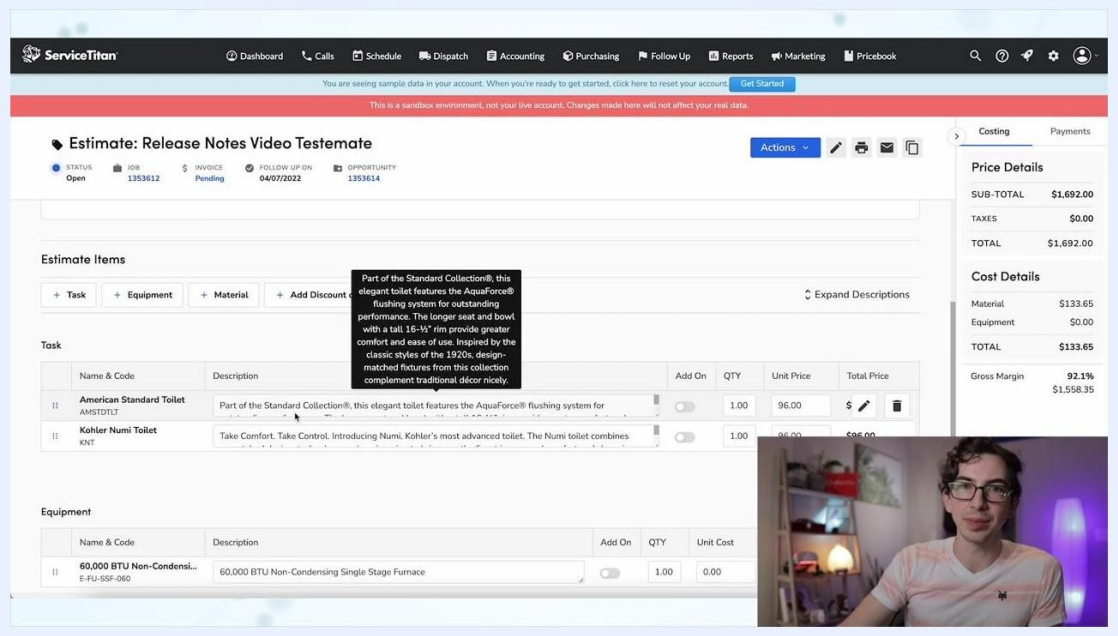
## Step 13: Expand or collapse line item descriptions

By default, long descriptions are truncated so more items fit on the page. Hover over a truncated description to view the full text in a tooltip.




**Estimate screen showing a tooltip with the full text of a truncated line item description**

Click **Expand Descriptions** to automatically resize all description boxes to fit their content.




**Estimate screen with all description boxes expanded to show full text**

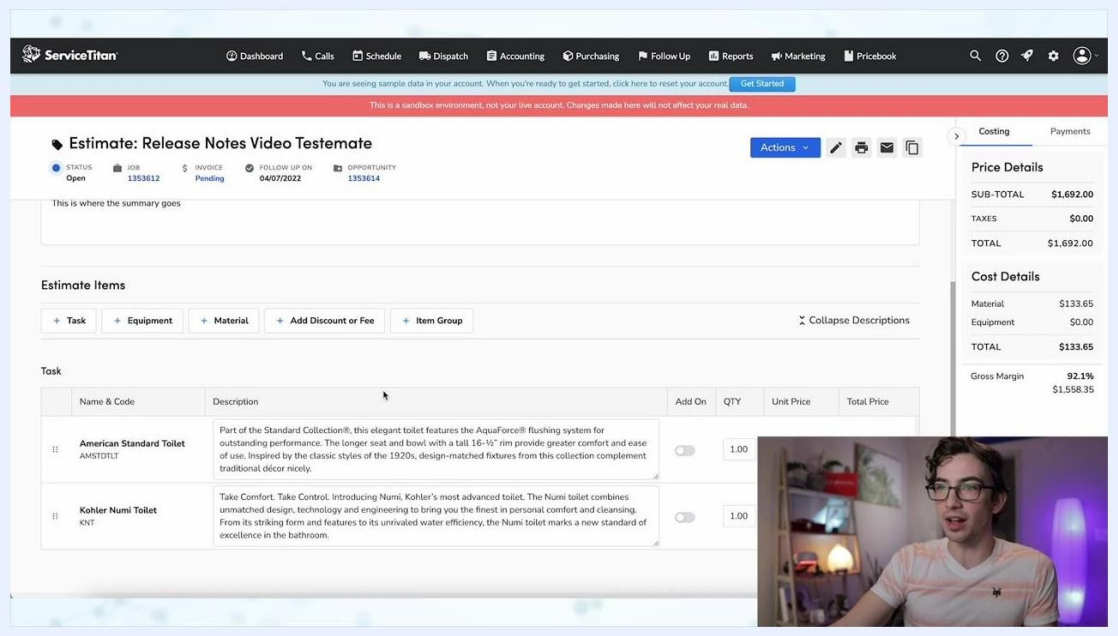
Click **Collapse Descriptions** to return to the compact view.

## Step 14: Use the estimate action buttons

In the top right corner of the estimate screen, use the following buttons as needed:

- **Duplicate**: Create a copy of the current estimate.
- **Email**: Send the estimate to the customer.
- **Print**: Print a hard copy of the estimate.

- **Edit**: Return to the editing screen to modify the estimate name or other details.

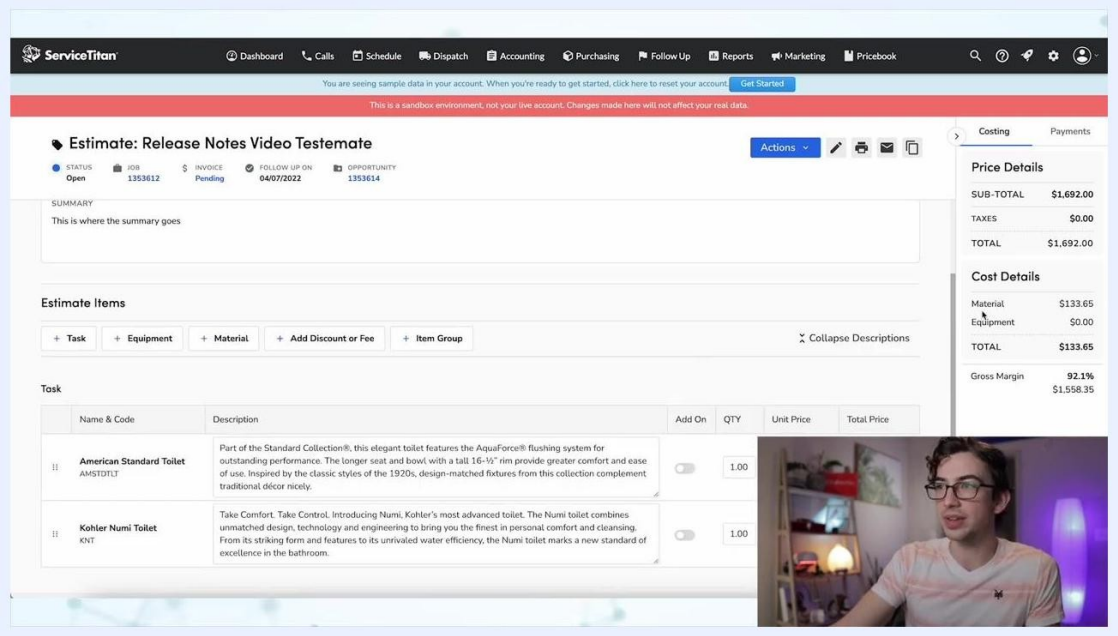



**Estimate screen with the cursor over the "Edit Estimate" button in the action bar**

## Step 15: Navigate and manage estimate information

Click the **Opportunity** link at the top of the estimate to view or sell it. Review the **Follow Up On** date, **Invoice** link, **Job Number**, and **Status** displayed at the top of the page.

Collapse the **General Information** section by clicking its header if you want a cleaner workspace.




**Estimate screen with the General Information section expanded, ready to be collapsed**

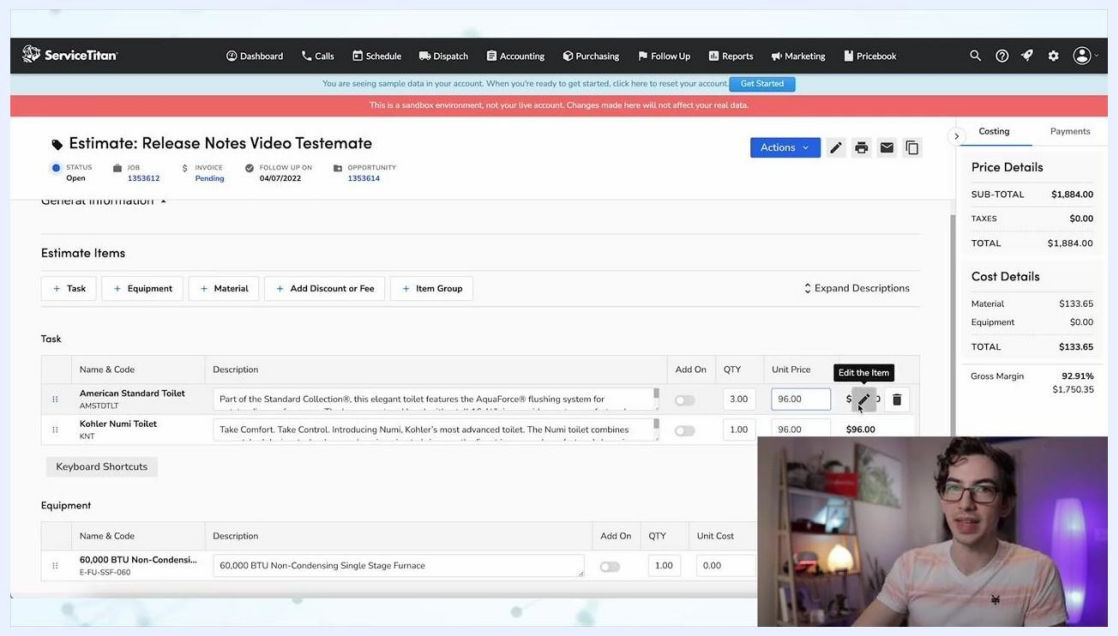
## Step 16: Drag and drop estimate items

Rearrange line items within the estimate by dragging and dropping them into the desired order.

## Step 17: Edit line item quantities inline

Click directly into the **QTY** field of any estimate line item to edit its value. Type the new quantity (for example, changing it from 1 to 3) and press **Enter** to update it. The system automatically recalculates totals based on the new quantity.

Use this method for quick, in-line adjustments to quantities or other editable fields.




**Estimate screen with the QTY field being edited inline, showing the edit pencil icon highlighted**

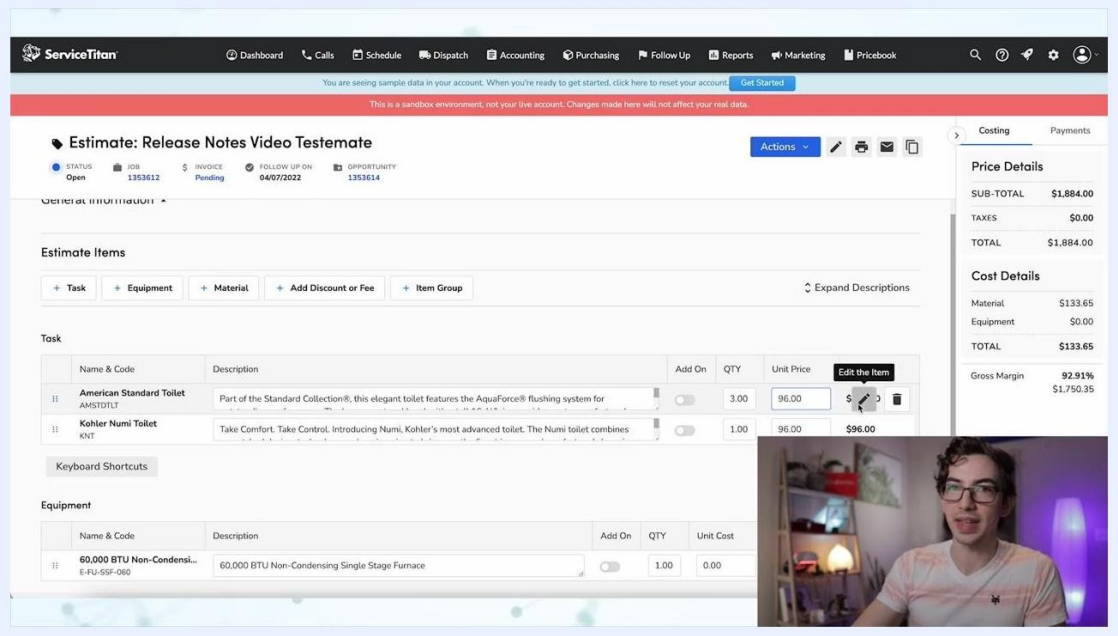
## Step 18: Open the edit item flyout for detailed changes

Hover over a line item and click the **edit pencil** icon labeled **Edit the Item**. A flyout panel titled **View/Edit Task Details** appears on the right side of the screen.

In the flyout, you can:

- Edit the **Name** and **Code** of the item.
- Update the **Description** field.
- Select associated **Equipment** from a dropdown.
- Adjust **Usage Details**, including **Qty**, **Unit Price**, and **Total Price** (calculated automatically).
- Toggle the **Is Add On** option if applicable.

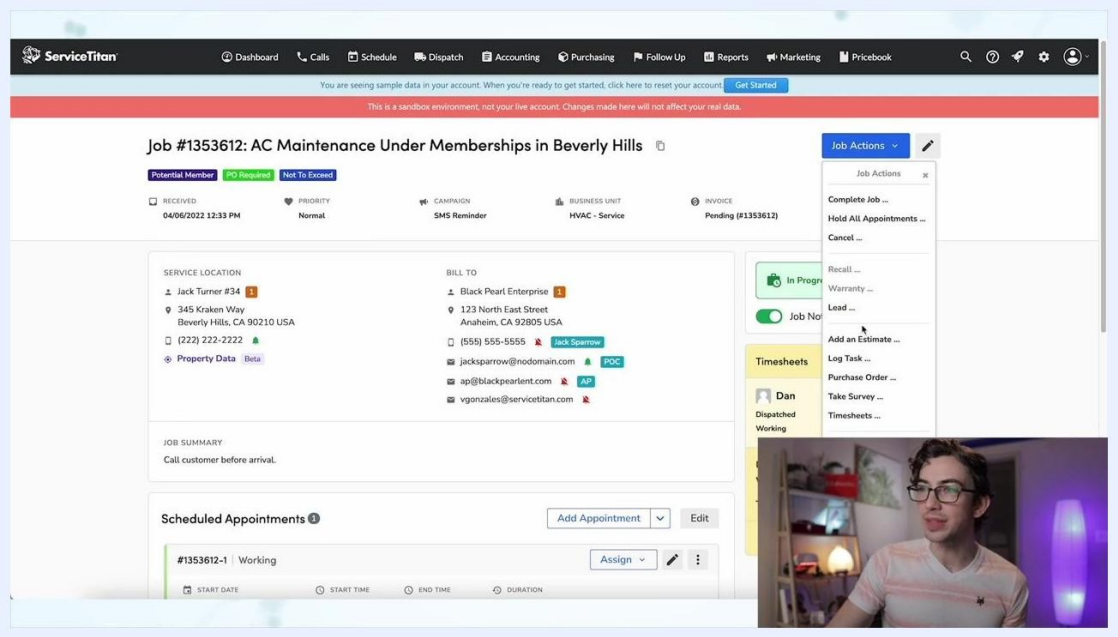
Click **Save** to apply your changes, or **Cancel** to discard them.




**View/Edit Task Details flyout showing editable fields for Name, Code, Description, Equipment, Qty, Unit Price, Total Price, and Save/Cancel buttons**

## Summary

By following these steps, you can efficiently create and customize estimates using the redesigned Office Estimates interface in ServiceTitan. The workflow gives you the flexibility to build item groups directly from the office, monitor price and cost details in real time, use keyboard shortcuts for faster data entry, and fine-tune line items through inline editing or the detailed edit flyout—all within a cleaner, more intuitive interface.




**ServiceTitan Release Notes Highlights title screen**