ServiceTitan CRM Integration
Setup & Configuration Guide

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Audience: HeavySet Tech Engineers, Client Administrators

Overview

This guide provides step-by-step instructions for integrating a client's ServiceTitan account with the HeavySet Tech platform. The integration enables automated booking, customer synchronization, lead management, and job tracking between ServiceTitan and HeavySet Tech's Web Scheduler.

These steps may be completed by a HeavySet Tech engineer or by an administrator from the client's organization who has been granted the appropriate access level within ServiceTitan.

Prerequisites

Before beginning the integration process, ensure the following requirements have been met:

• The client has an active ServiceTitan account in good standing.

• The client is prepared to either create a new user account for HeavySet Tech or provide access through an existing administrator account.

• The designated account has access to both the ServiceTitan application settings and the ServiceTitan Developer Portal.

• A HeavySet Tech engineer or designated point of contact is available to receive and securely store integration credentials.

Phase 1 — Account Preparation

ServiceTitan Account & Developer Access

Step 1: Create a Developer Account for HeavySet Tech

The client must provide HeavySet Tech with access to their ServiceTitan environment. This can be accomplished in one of two ways: the client may create a new user account within their

ServiceTitan instance specifically for the HeavySet Tech developer, or the client may provide credentials to an existing administrator account. If a new account is created, it should be associated with the HeavySet Tech engineer's email address or a shared support address as appropriate.

Step 2: Grant Administrator Access

If a new account was created in Step 1, the client must grant that account full administrative privileges within ServiceTitan. Admin access is required to authorize API integrations, manage application connections, and configure booking provider settings throughout the remainder of this guide. If the client has elected to use an existing admin account, this step may be skipped.

> **Note:** If the client is using an existing administrator account, Step 2 is not required. The account used must have sufficient permissions to access Settings, Integrations, and the Developer Portal.

Phase 2 — Developer Portal Configuration

Application Registration

Step 3: Access the ServiceTitan Developer Portal

Using the admin credentials established in Phase 1, navigate to the ServiceTitan Developer Portal. Log in by selecting the "Login as Production Environment User" option. This ensures that all configuration changes are applied directly to the client's live environment.
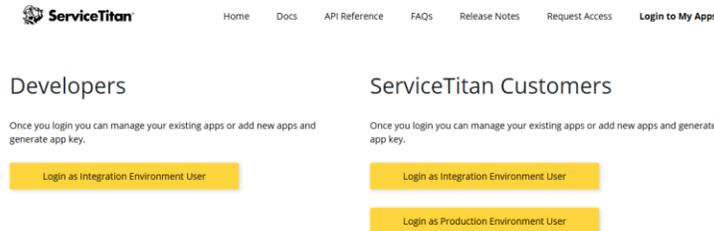

Figure 3 — Developer Portal login screen with Production Environment option

Step 4: Navigate to the My Apps Section

Once authenticated, locate and select the "My Apps" section from the Developer Portal navigation menu. This area is used to manage all registered API applications associated with the account.

Step 5: Initiate a New Application

Within the My Apps section, click the "+ New App" button to begin registering a new integration application. This will open a form for entering the required developer and application details.

Figure 5 — My Apps page with + New App button

Step 6: Complete the Application Registration Form

Populate the application registration form using the values listed in the table below. Fields not listed should retain their default values unless otherwise directed by a HeavySet Tech engineer.

Field	Value

Organization	HeavySet Tech
Homepage	https://heavyset.tech
Email Address	Assigned engineer or support contact
Application Name	HeavySet Tech
Description	As needed for integration context
App Category	Web Scheduler
Tenants	Do not modify (use default value)
Customer Global Network(s)	No additions required
External Data Application GUID	Do not modify (use default value)
Client Credentials Management	"I, the app developer, will configure the credentials on behalf of each tenant"

Configure the following API Scopes for the application:

Permission	Scope
Read	Bookings, Customers, Leads, Appointments, Jobs, Campaigns, Business Units, Technicians
Write	Bookings, Customers, Leads, Appointments, Jobs

Note: The Tenants, Customer Global Network(s), and External Data Application GUID fields should not be modified from their default values unless specifically instructed by a HeavySet Tech engineer.

API Scopes

API Endpoint	Read	Write
⌄ Accounting All None		
AP Bills	☐	☐
AP Credits	☐	☐
AP Payments	☐	☐
Bank Deposits	☐	☐
Credit Memos	☐	☐
GL Accounts	☐	☐
Inventory Adjustments	☐	☐
Inventory Bills	☐	☐
Inventory Receipts	☐	☐
Inventory Transfers	☐	☐

Figure 6 — Application registration form

Step 7: Submit the Application

After verifying that all fields are filled in correctly, click the "Create App" button to submit the application for registration.

Step 8: Verify Application Registration

Return to the My Apps page and confirm that "HeavySet Tech" now appears as a listed application. This confirms that the app has been successfully registered within the Developer Portal.
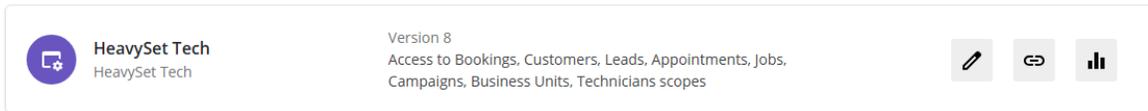
HeavySet Tech
HeavySet Tech

Version 8
Access to Bookings, Customers, Leads, Appointments, Jobs, Campaigns, Business Units, Technicians scopes

Figure 8 — My Apps listing showing HeavySet Tech

Phase 3 — Booking Provider Configuration

ServiceTitan Booking Provider Setup

Before connecting the HeavySet Tech application to the client's tenant, a booking provider tag must be created in ServiceTitan. This tag is required so that HeavySet Tech appears as a selectable booking provider during the tenant authorization process in Phase 4.

Step 9: Navigate to Booking Provider Settings

Using the ServiceTitan admin account, navigate to the main ServiceTitan application and go to Settings → Integrations → Booking Providers.
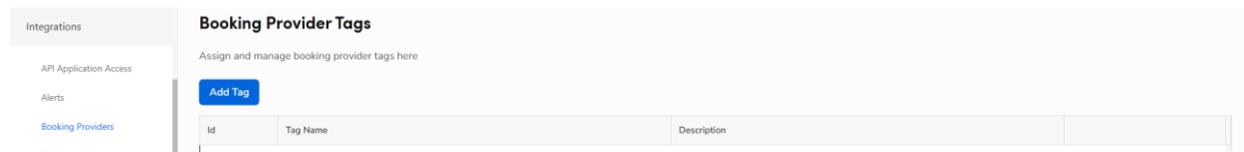

Figure 9 — Settings > Integrations > Booking Providers

Step 10: Add a Booking Provider Tag

Click the "Add Tag" button and create a new tag for "HeavySet Tech." This tag allows ServiceTitan to identify and categorize bookings originating from the HeavySet Tech integration.
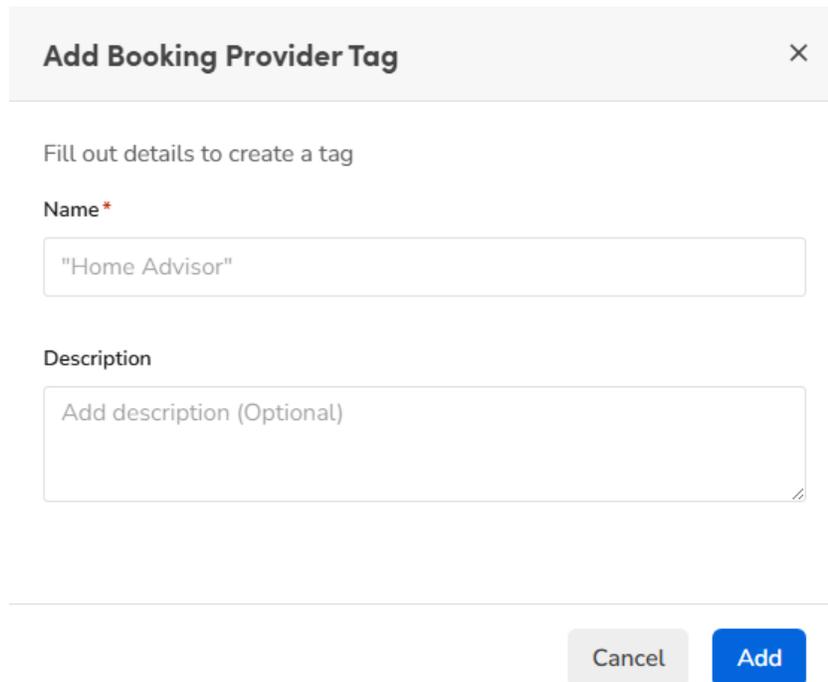

Figure 10 — Add Tag dialog for HeavySet Tech

Step 11: Record the Booking Provider ID

After the tag has been created, locate and record the associated Booking Provider ID. This identifier is required for the final integration configuration in the HeavySet Tech platform.

Phase 4 — Tenant Authorization

Connecting the Application to ServiceTitan

Step 12: Open the API Application Access Settings

Within the ServiceTitan admin console, navigate to Settings → Integrations → API Application Access. This section controls which third-party applications are authorized to interact with the account's data via the ServiceTitan API.

Figure 12 — Settings > Integrations > API Application Access

Step 13: Connect a New Application

Click the "Connect New App" button to initiate the process of authorizing a registered application.

Step 14: Select and Connect HeavySet Tech

From the list of available applications, select "HeavySet Tech" and click "Connect" to establish the integration link between the client's ServiceTitan account and the HeavySet Tech platform.

Step 15: Configure Booking Provider Restrictions

In the "Restriction by booking_provider for Bookings" dropdown menu, select "HeavySet Tech." This option is available because the booking provider tag was created in Phase 3. Selecting it ensures that bookings created through the HeavySet Tech integration are correctly attributed and filtered within ServiceTitan.

Step 16: Accept Terms and Conditions

Carefully review the Terms and Conditions presented on screen. Once reviewed, click the "Accept" button to finalize the application connection. This step is required to activate API access for the HeavySet Tech integration.

Phase 5 — Credential Generation & Collection

Retrieving OAuth & Application Credentials

Step 17: View Connection Details

Return to the Developer Portal and navigate to the My Apps section. Locate the HeavySet Tech entry in the applications table and click "App Connections." This will display the connection details between the application and the client's tenant.
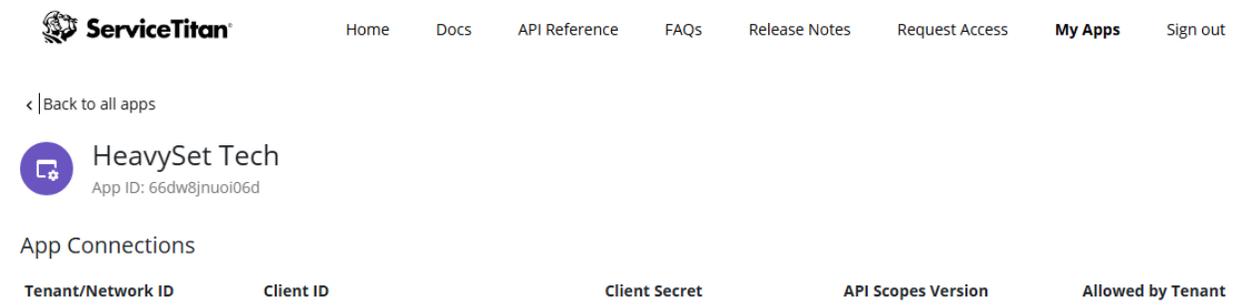
| ServiceTitan | | Home | Docs | API Reference | FAQs | Release Notes | Request Access | **My Apps** | Sign out |

< | Back to all apps

HeavySet Tech
App ID: 66dw8jnuoi06d

App Connections

Tenant/Network ID	Client ID	Client Secret	API Scopes Version	Allowed by Tenant

Figure 17 — View Connections panel

Step 18: Verify Connection Status

On the connection details screen, confirm the following: a valid Tenant ID and Client ID are displayed, and a green indicator dot is visible under the "Allowed by Tenant" column. These values are required for OAuth authentication between HeavySet Tech and ServiceTitan.

Step 19: Generate the Client Secret

Under the "Client Secret" section, click the "Generate" button. A confirmation dialog will appear displaying the Tenant ID and Client ID for verification. Review these values carefully, then click "Yes, Continue" to generate the secret.

> **Note:** The Client Secret is displayed only once during generation. Ensure it is recorded immediately and stored in a secure location. If the secret is lost, a new one must be generated, which will invalidate any prior credentials.

Step 20: Record OAuth Credentials

Securely record the following three values from the connection details screen. These credentials are required for configuring the HeavySet Tech CRM integration:

- Tenant ID
- Client ID
- Client Secret

Step 21: Return to the My Apps Page

Navigate back to the My Apps listing in the Developer Portal.

Step 22: Retrieve the Application Key

Locate the HeavySet Tech entry in the applications table and click the "Edit" button. On the application edit screen, locate and record the Application Key. This key is used alongside the OAuth credentials to authenticate API requests.

Figure 22 — Application edit screen showing Application Key

Phase 6 — Finalize Integration

HeavySet Tech Platform Configuration

Step 23: Enter OAuth Credentials in CRM Connection Settings

In the HeavySet Tech platform, navigate to Connections → CRM → Edit Config → CRM Connection Settings. Enter the following four values into their corresponding fields: Tenant ID, Client ID, Client Secret, and Application Key.
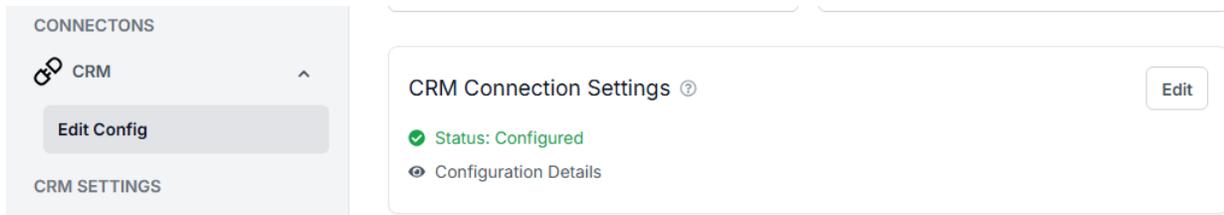

Figure 23 — Connections > CRM > Edit Config > CRM Connection Settings

Step 24: Enter the Booking Provider ID

Navigate to CRM Settings → Service Titan → Settings. Enter the Booking Provider ID recorded in Phase 3 into the designated field.
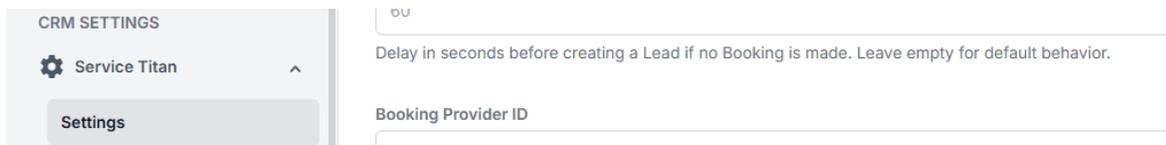

Figure 24 — CRM Settings > Service Titan > Settings

Step 25: Verify the Integration

Once all credentials have been entered, perform a test booking or API call to confirm that the integration is functioning correctly. Verify that data is flowing as expected between HeavySet Tech and ServiceTitan.

> **Note:** If any credential values are rejected or the connection fails, revisit Phase 5 to regenerate and re-enter the affected credentials. Ensure there are no trailing whitespace characters in the pasted values.

Appendix

Credential Reference

The table below provides a consolidated reference of all credentials required for the ServiceTitan integration, including where each value is sourced and where it must be entered in the HeavySet Tech platform.

Credential	Source Location	HeavySet Tech Destination
Tenant ID	Developer Portal → View Connections	Connections → CRM → Edit Config → CRM Connection Settings
Client ID	Developer Portal → View Connections	Connections → CRM → Edit Config → CRM Connection Settings
Client Secret	Developer Portal → Generate under Client Secret	Connections → CRM → Edit Config → CRM Connection Settings
Application Key	Developer Portal → My Apps → Edit	Connections → CRM → Edit Config → CRM Connection Settings
Booking Provider ID	ServiceTitan Settings → Booking Providers	CRM Settings → Service Titan → Settings

Troubleshooting

• Ensure the admin account has the correct permissions to access both the ServiceTitan Settings and the Developer Portal.

• If the HeavySet Tech application does not appear in the Connect New App list, verify that the application was created in the production environment (not sandbox).

• If HeavySet Tech does not appear in the booking provider restriction dropdown during Step 15, return to Phase 3 and confirm the booking provider tag was created successfully.

• If the Client Secret has been lost, return to the Developer Portal and generate a new one. Note that this will invalidate the previous secret.

• If the "Allowed by Tenant" indicator is not green, confirm that the tenant authorization steps in Phase 4 were completed in full.

Support

For questions or issues related to this integration, contact the HeavySet Tech engineering team or reach out to support via the contact information provided during onboarding.