Navigation

07/29/2024 11:48 am CDT

The features you'll have available may vary based on either your account type or your permissions. If you read about a feature that you're interested in but don't have access to, check with an Organization Administrator for your account or if you are the Organization Administrator, check with your franchisor or Account Manager for more info.

Guided Tour

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Keywords

- **User Interface** - This section describes the terms used in the documentation to describe various elements in the user interface.
- **Desktop Interface** - The desktop interface is referred to as service**minder**|desktop, or desktop app for short. This documentation is visible only within the desktop interface. The desktop app is designed for use on PCs and tablet devices.
- **Mobile Interface** - The mobile interface is referred to as service**minder**|mobile, or mobile app for short. The mobile app is designed to be used on phones.
- **Grids** – a term for certain pages within service**minder** that allow you to quickly see and organize large amounts of data; looks similar to a spreadsheet or list

Navigational Areas

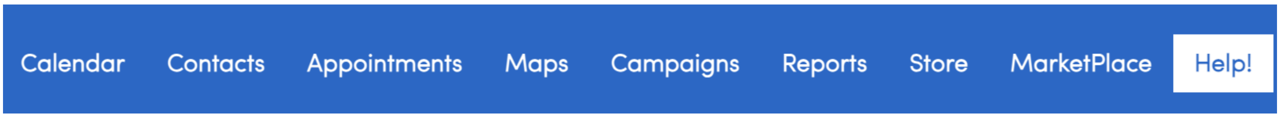
We have divided the desktop interface into three parts:

1. The main window
2. The top menu (in the colored bar at the top of the screen)
3. The side panel (on the left).

The Mobile interface is divided into two parts:

1. The main window
2. The side menu (opened by the hamburger menu, represented by three horizontal lines)

Top Navigation Menu



This is the main menu where most common daily tasks are located for regular users. This is located at the top right of the screen. Again, some of these options may not available to you depending on your user permissions.

- **Calendar** is considered the "Home" screen within service**minder** and it includes month, week, and day views. You can see all scheduled appointments in once place and even tell which service the appointment is for at a glance.
- **Contacts** is a grid showing all customers (or other contacts). You can quickly sort and filter in real time, and even drag and drop columns to organize information in a way that matters most to your business. You can create new contacts here or download lists.
- **Appointments** is another grid where you can select different types of appointments including Upcoming, Queued and All.
- **Maps** page is used to do geographic reporting and scheduling. You can look at where Contacts, Proposals and Appointments. It can also be used to schedule appointments based on geography.
- **Campaigns** page is used to set up Channels and Campaigns. You can also review any Email Campaigns you've launched from here
- **Reporting** page contains a variety of reports, charts and downloads.
- **Marketplace** page is where you can look for add-on features and services.
- **Help** You are reading this so you probably already know about the Help module. You can also open a support ticket from here.

Side Panel

Hamburger Menu

The left-hand panel is present on every page. From there you can always search for contacts as well as access common Shortcuts for things like adding new contacts or scheduling a new appointment.

For the Web

The "hamburger" icon is used to show/hide the left-hand navigation panel. This setting will be remembered for your user. Just click the icon to hide or show the Navigation panel whenever you want more room.

For the App

The "hamburger menu" is in the upper right on most pages in the app. You will note that the app does not include as many features and options as the web version does. We are adding more features to the mobile app, but it is primarily for owners and workers in the field.

Remember that user permissions play a role in what menu items a user sees and can access. We will cover these user permissions in the next learning module.

Shortcuts

Everyone has specific things they need to access frequently. To make it easier to bookmark your favorites, we created the Shortcuts sidebar. Shortcuts show you taskboards and custom grid filters of your choosing.

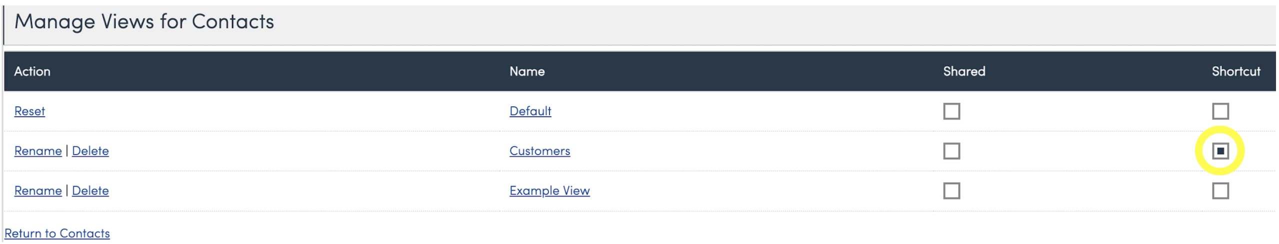
How to Add A Shortcut

1. Grid Filters

You can create custom views using grid filters. After setting your filters, at the bottom of the screen you can type in a name and hit Save, and this creates a new View for you.

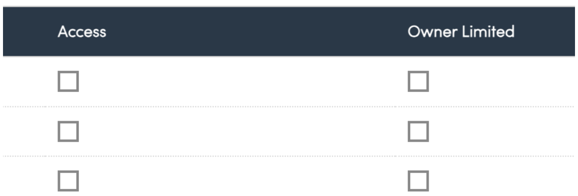
Click Views to see any saved views that you have.

Checking the box for Shared will allow other users in that org to see the saved view, and the Shortcut box will add it into the left sidebar for easy access.



2. Taskboards

You can edit your taskboards and check the box for different contacts under "Access." This will add the taskboard into the left side bar for that user. By checking the "Owner Limited" box, you restrict users to see only the contacts of which they are the designated "owner"



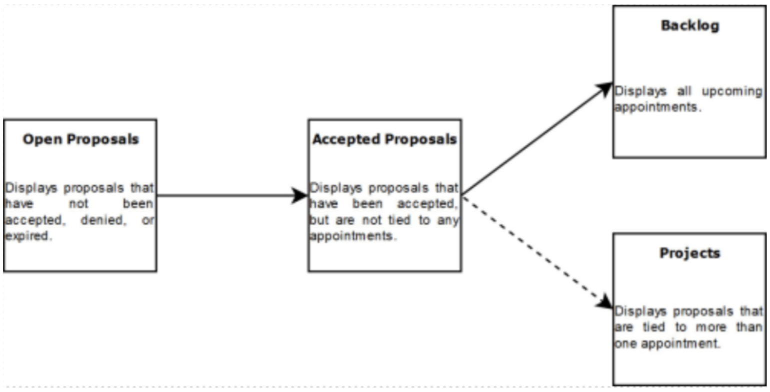
Snapshots

The Snapshots navigation area contains a list of items and counts or currency totals. Clicking the item will take you to a page listing all of the corresponding items.

Snapshots provide you with a direct link to conveniently filtered invoices, proposals, and more. Alongside each snapshot is a count of results they contain. The backlog also has the total value of all of the appointments.

Proposals and Appointments

There are several snapshots for viewing proposals and appointments broken into distinct categories. It may not be abundantly clear which category your proposal or appointment will be in at first, so the chart below should help.



Payments and Invoices

Failed Payments

This page displays installment payments that failed to go through, providing a message and a button to retry the charge.

Open Invoices

Any invoices with outstanding balances will appear with the options to pay off invoices or resend them.

Unapproved Invoices

All unapproved invoices will appear here for you to review and approve.

Recurring Billing

All customers with active subscriptions/recurring billing will appear on this grid.

Other

Expired Service

All customers whose "Next Service Date" has passed will appear here.

Print Queue

Documents added to the print queue may be printed in bulk, whole or part, from this page. Within **Control Panel >> Invoices, there is an option to add all invoices to the print queue, making it easy to print all of your invoices at once.

Tasks

This view displays a list of tasks users have set for contacts.

The Administration panel has links to different configuration pages. The most commonly used destination is the Control Panel. That is where you'll find most of the settings for basic service**minder** operation.

It also includes links to set up some of the optional Add Ons such as Drips or Dispatch. You may not see all of these options since some of these are optional features with additional expense.

These add-ons can be selected from the "Marketplace" page in the top menu. Depending on the way your main brand account and organizations are setup within service**minder**, Owners may have access to add on features without approval. However, we strongly recommend discussing it with your Brand Admin or someone from the operations team of your brand before purchasing additional features.

The Administration section of the panel will be discussed in greater detail in later learning modules.

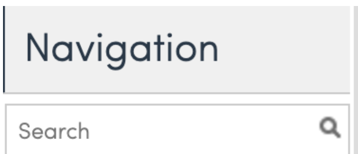
Tips and Tricks for Navigating

While it may seem like a lot upfront, you will quickly become familiarized with where everything is located. To make it easier bouncing between pages and features, we have created several navigational aids.

Breadcrumbs

The breadcrumb trail is located just below the logo on the top left of the page. It tracks your page viewing history. As you drill down to other pages, it will display a list of other pages you have visited. You can click a link to go back to a specific page.

Search Box



The search box allows you to search your contacts. Enter a portion of a contact's Name, Company, Street Address, Email or Phone number. If you're not sure how a name is spelled, just type in the shortest portion that will match. Then either click on the search icon or press the enter key. If there is a single match, the Details page will be displayed. If there are multiple matches, a grid with the results will be displayed. Just click on the Name of the one you want to view.

You can also use the "[" and "]" characters to indicate "starts with" or "ends with." For example searching for "[tom" will find all contacts that start with the letters "tom". You can use both "[" and "]" to do an exact match.

Frequently Asked Questions

Why can't I see everything that is shown in the top menu navigation and the side navigation panel?

All the options shown in this Help section represent all the features and functions of the service**minder** tool. You may not be able to see certain things because you don't have full access. User permissions will be discussed in the next module. Different permission levels provide access to features, settings, and functions. If you wish to be granted a higher level of access, you will need to discuss that with the Owner, Brand Admin, or someone from your Brand's operations team.

I can't see the side navigation panel at all. It is missing. What do I do?

Directly under your brand logo in the top left of the screen, you should see three horizontal lines. This is called a hamburger menu. When you click on the hamburger menu, the side navigational panel should appear. You can collapse or expand this panel at any time to give you more room to read or work within service**minder**.
