Service Agents and Subcontractors

09/29/2025 10:22 am CDT

Overview

Service Agents are intended for any person or resource that need to be scheduled. When you schedule an appointment on your calendar, you will choose which Service Agent(s) you need for that appointment. A person who logs in to serviceminder requires a User account to log in and a Service Agent to be scheduled on appointments. For example, an office administrator will have a User account, but may not need a Service Agent because they are not going to appointments.

Service Agents can also be used to keep track of equipment that is being used for appointments, so that you avoid running into the situation of needing the same equipment in two places at once.

Additionally, Service Agents can give you a way to schedule subcontractors and send them receive notifications about their appointments while keeping them separate from your business operations.

This article will review:

Video Tutorials

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Settings and Navigation

To create a new Service Agent, navigate to the **Control Panel**, scroll down to the **Users and Services** section and click on **Service Agents**. Then, click Add at the top left corner of the grid.

Kinds

There are three kinds of service agent.

1. **Employee:** This agent type is intended for users within our system who will be working appointments. To make a user available for scheduling, first create a service agent for them, then attach the service agent to the user by editing the user's profile and selecting their Service Agent from the drop down menu. If you want a user to only log in using the mobile app, assign them the role of "Service Agent - Mobile".

2. **Subcontractor:** This agent type is associated with any person who will be working an appointment but is external to your business. Create one service agent for each subcontractor that you need to schedule. You can then include them on any of your appointments as the primary agent or just include them as an additional resource for certain appointments. In this scenario you would not attach them to a user so they would not be able to log in, but they could still receive notifications about appointments.

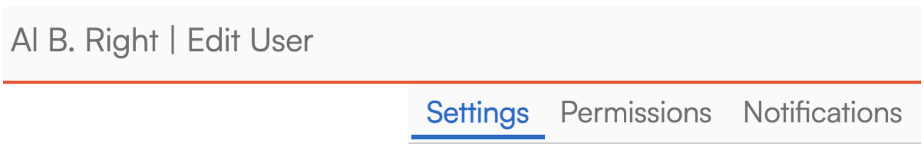
3. **Equipment:** You can create service agents to represent equipment or other resources that need to be scheduled. In these cases, the service agent is not interactive and so you wouldn't attach them to a user.

Sorting

The order of service agents shown on the day calendar is determined first by whether the agent is marked as Internal or not. All internal agents are grouped at the end (far right) of the calendar. They are then sorted by their Order (a number you can assign to each agent when editing) or their Name (if there are multiple agents with the same order). So the sort order is first by their Internal status then by their Order, then by their Name.

Service Agent Permissions

The permissions and settings are determined on the **User** profile. You can set these by going to **Control Panel > Users** and adding a new or editing an existing user. There, you will find three tabs:

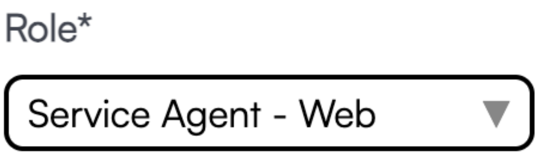


The role is set on the **Settings** tab, however, you may want to review the **Permissions** and **Notifications** settings as well and make adjustments based on what you want that specific user to be allowed to see and do.

> The permissions tab is only available when editing an existing user. To see this tab, save your new user and

click edit next to their name to return to this page.

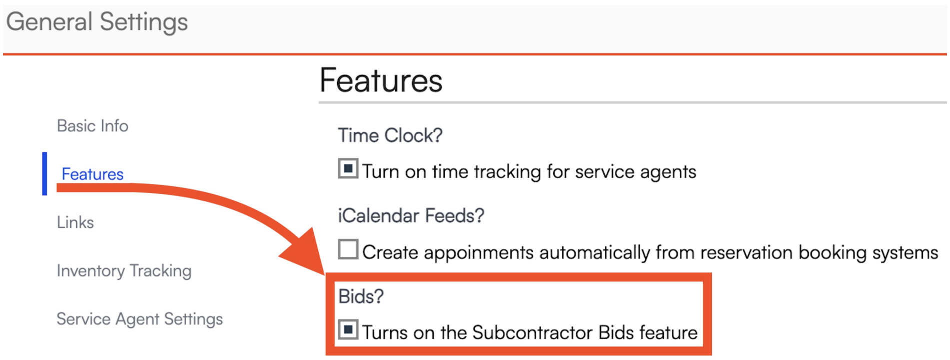
By selecting the role, you can automatically have the system default to certain settings. For instance, you can allow service agents or subcontractors to only be able to access certain areas of the web or only access the app.



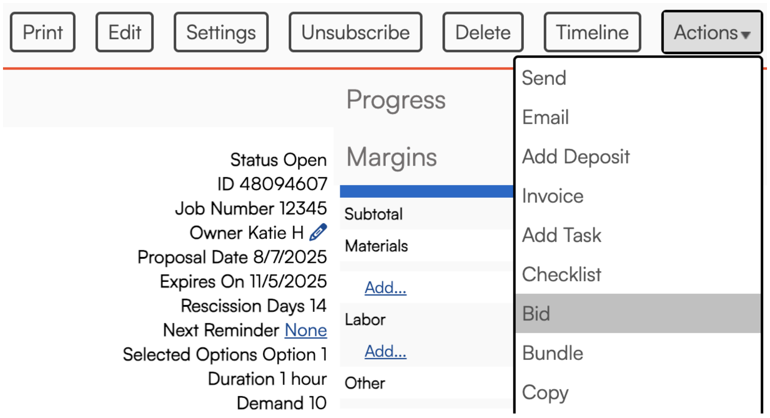
A **Service Agent - Web** role can access both the app and the web version of service**minder**. However, the **Service Agent - App** can only access the mobile app.

Bids

To allow subcontractors to receive bids, you need to turn that on separately. Go to **Control Panel > General > Features** and find the **Bids?** checkbox. Turn it on to get the "Bids" button to appear on proposals.



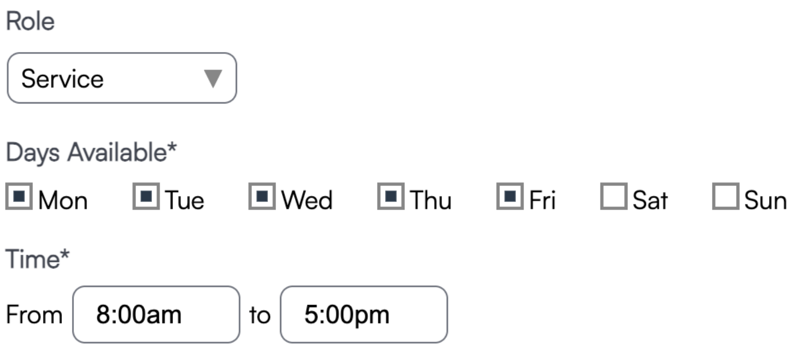
Create a bid directly from a proposal by clicking **Actions > Bid.**



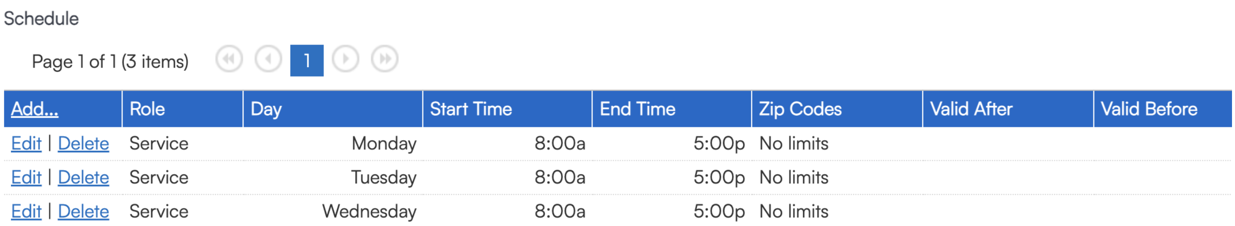
If you don't want to add subcontractors to your service**minder** system or they do not want to use the tool, you can share the bid with them using a generated link that does not require them to login.

Availability

When you first create a service agent, you can select the availability and the associated Service Role.

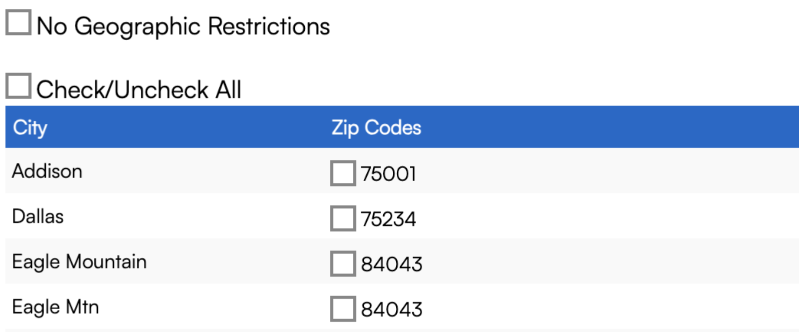


You can also review and adjust a service agent's schedule when editing the service agent profile.



Add...	Role	Day	Start Time	End Time	Zip Codes	Valid After	Valid Before
Edit | Delete	Service	Monday	8:00a	5:00p	No limits		
Edit | Delete	Service	Tuesday	8:00a	5:00p	No limits		
Edit | Delete	Service	Wednesday	8:00a	5:00p	No limits		

You can also restrict the agent's availability by zip codes and GeoZones by clicking **Edit** next to that time slot and un-checking the box that says **No Geographic Restrictions**. Any time slots with these restrictions will only be available to contacts that match either the postal codes or GeoZones. This is one way to keep certain service agents in a specific area of your territory by day of week.



City	Zip Codes
Addison	75001
Dallas	75234
Eagle Mountain	84043
Eagle Mtn	84043

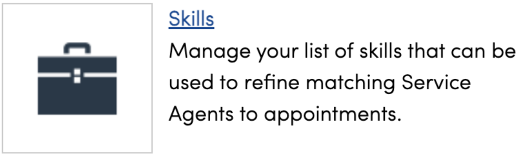
Service Roles and Skills

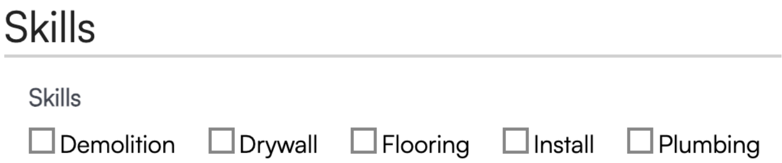
Roles

Service Roles are used to distinguish between different types of activities. The two default roles are Sales and Service. Additional Roles can be added in **Control Panel > Service Roles**. For example, you would assign your salesperson the role of Sales and your technician the role of Service. Then, when scheduling appointments, your employees will only show as available for the type of task they are qualified to do.

Skills

Skills allow you to fine-tune which service agents are qualified for specific services. Skills can be created in **Control Panel > Skills**. Once you've defined your skills, you can then assign each agent their relevant skills by editing the service agent profile.





Each service can be configured to require specific skills. When a service requires a list of skills, service**minder** will only present time slots for service agents who have all of those skills.

Service Agent Reporting

Upsell

Upsell represents any difference between when the appointment was booked and when it was completed. If positive, it represents dollar value of what was added. If it's negative, it is what was removed. So instead of comparing it to previous invoices, it looks at the value on the appointment when it was booked and compares it to the value when it was finished.

FAQs

I have the service agents set up in serviceminder. Will they receive an invite, so they can set SM up on their phone and have the needed access?

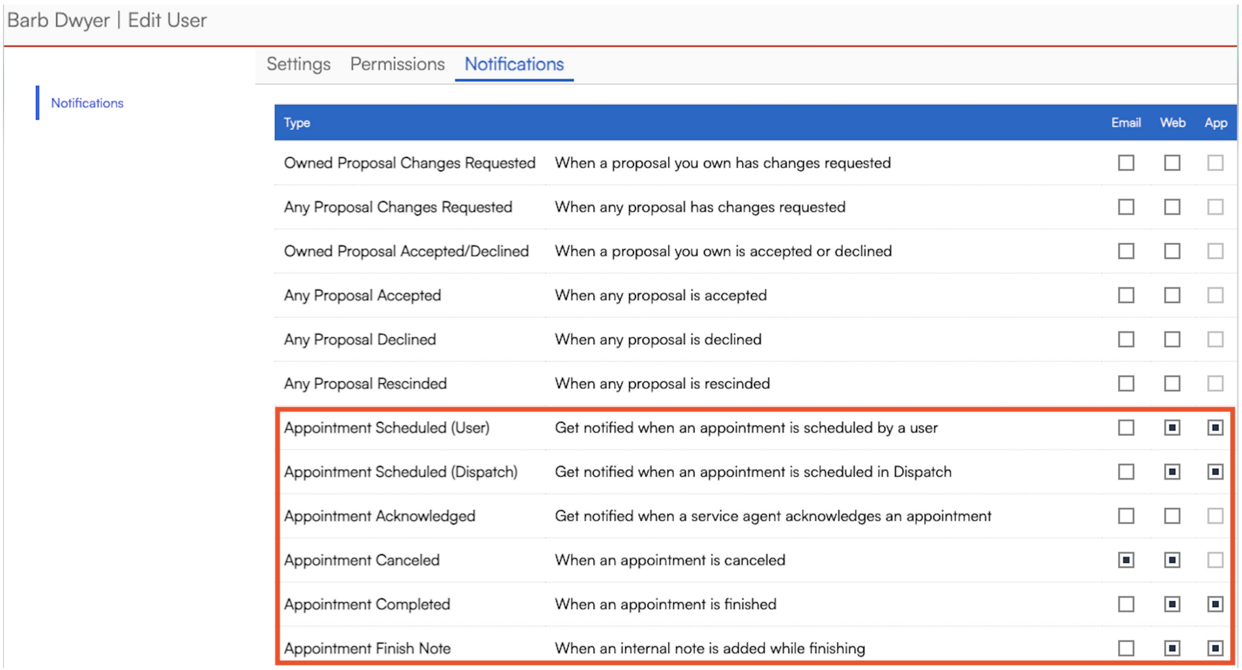
They will get an invite as long as you create a **User** account for them. You can assign their Service Agent to their User so that information is connected.

Do I have to create both a User and a Service Agent if the techs only need to access the App?

Yes, should create a User and a Service Agent for them. If they need to access the App, they have to have a User account. Otherwise, there is no way to attach their hours and have it show on their schedule.

How do I set the notifications so Service Agents only get notified for the jobs they are scheduled for?

By default, agents should only get their own appointment notifications. If they are receiving additional communications, check these settings for the User. They should be turned off for any users that *shouldn't* receive **ALL** appointment confirmations and reminders.



How do I make it so my agent can to see the internal notes when she starts and finishes an appointment?

Go to **Control Panel > User** and edit their user. Go to **Permissions** tab at the top of the page and you will see a list of options to **Grant** or **Deny**. You will want to grant them access for **Contacts:Notes**.

I'm trying to schedule but no agents/timeslots are showing. What am I doing wrong?

Check to see which **Service Role** is set for the service you are trying to schedule (**Control Panel > Services**). Also check to see if there are any Skills assigned to that service. Then make sure you have at least one Service Agent that has that role and skill(s) assigned to them (**Control Panel > Service Agents**). Also double check that your Service Agents have a schedule created with available times.

When a Service Agent is made inactive, how is their past data handled?

Everything remains there except for appointments. If the service agent has appointments assigned to them when you make them inactive, after hitting save, the system asks if you want to queue those appointments so you can reassign them.

I went to make a service agent inactive, but got a warning stating that they were assigned to appointments. What is the best way to see all the appointments a Service Agent is assigned to?

Try using the **Appointment Details** report. That will allow you to put whatever date range you want to look for, the date of the appointment, the contact the appointment is for, the primary service agent, and the additional service agents. Once you have identified which appointments need to have that Service Agent removed, you will need to reassign the appointments manually.

I have a Service Agent that is no longer working for me. When I made them "Inactive", it said they have many appointments that she was on. Are those appointments queued automatically?

They'll only queue if they were the lead agent on the appointments. If they were just an additional agent then the appointments should remain scheduled. To confirm, you can go to **Day** view on the calendar and future queued appointments should be below the schedule, or you can go to **Appointments** and in the **Upcoming** grid filter on the status of **Queued**.