

The Contact Portal and Self-Scheduling

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Overview

The Contact Portal serves two functions: allowing customers to view their account information and to self-schedule their appointments. You also have the choice to enable the online account feature while disabling online scheduling features, which would still allow your contacts to view their appointments, proposals, and invoices.

This article will review:

- [Settings and Navigation](#)
- [Tracking Leads](#)
- [FAQs](#)

Settings and Navigation

To get started, you need to decide which services, if any, you want to offer for self-scheduling. Common services for self-scheduling include estimates, annual maintenance checks, or system inspections. To enable self-scheduling for a service:

1. Navigate to **Control Panel > Services**.
2. **Edit** the services you want to offer and check the **Enabled** checkbox in the **Self-Service Scheduling** section for each service..

Self Service Scheduling

- Enable this service for scheduling via API and self service scheduler
- Require capture of payment info when scheduling via self service scheduler

Timeslot Limit

Limit the number of timeslots presented for self service scheduling

Next, you'll need to enable the **Contact Portal**:

1. Go to **Control Panel > Scheduling**.
2. Scroll down to the **Online Scheduling** section.

3. Check the **Account Creation** box to allow contacts to create accounts.

4. If you want customers to be able to schedule appointments, also check the **Online Scheduling** box.



You can enable the Account Creation option by itself if you would like your customers to have the ability view invoices, make payments, and check appointments but not schedule appointments.

Online Scheduling

Calendar Options

Scheduling Options

Communications

Proposals and Invoices

Cancel Reasons

Online Scheduling

Operational Options

Miscellaneous Options

Holidays

Online Scheduling

Enables online scheduling, accounts and appointment cancel functions

Account Creation

Allow contacts to create an account when using Online Scheduling

Having an account allows contacts to log in to view invoices, appointments and proposals

Scheduling API Key

--Select one-- ▼

Scheduling Url

<https://serviceminder.com/service/schedule/badf51bd67065b5ddf27ebe5ec5a9edf> | [Copy](#)
3 displays | [Reset](#)

Add this link to your website to link to the Scheduler for online appointment booking.

Account Url

<https://serviceminder.com/service/account/badf51bd67065b5ddf27ebe5ec5a9edf> | [Copy](#)

If you only use accounts, this url will take clients directly to the Account sign in page.

Self Service Radius*

100 [Zips/Cities in Service Area](#)

This is the maximum distance (in miles) from your warehouse that someone can self service schedule.

To add the online scheduler link to your website, click **Copy Link** and embed it on your site. Customers clicking the link will be directed to the scheduler to make appointments.

Once enabled, you can preview how the portal will look to customers by clicking the link. The top portion of the online scheduler allows users to select from available services.

Already have an account? [Sign In](#) >

Service

Select the service you want performed

Contact

We need to know where you live so we can schedule your service

Schedule

Select from the available dates and times

Confirmation

Confirm your appointment

1. Select a service

Service	Description	Price
Annual Maintenance	We will perform a full system check on your system and repair any normal issues. Your system is then covered for normal maintenance issues for a full year from date of service.	\$299.00
Annual Maintenance - 5 Years	Annual Maintenance, 5 years.	\$18.00 per unit
Barrier Spray	Full yard spray every 2 weeks until the end of the season.	\$899.00
Carpet/Tile Cleaning	We'll clean and dry your carpets or pressure wash your tile, including grout. Just select the number of rooms you want cleaned.	\$39.00 per unit

Further settings below the URLs allow you to configure details like scheduling radius and cancellation policies.

- **Self Service Radius:** The maximum distance (in miles) from your warehouse that someone can schedule a service using the online scheduler.
- **Cancellation Hours:** The minimum number of hours for free cancellation of an appointment.
- **Cancellation Fee:** The fee you charge for cancellations within within the window of time you have set.
- **Show Team Slots Only:** Only show Team time slots and not individual agent time slots when scheduling online.
- **Exclude Internally:** Hides Self Service services from the dropdown menu when creating appointments or proposals internally.
- **Self Service Phone:** Set an alternative phone number to display on the self service scheduler page.
- **Hide Queued Appointments:** If a contact creates an account, they can view the dates of their appointments. Check this to prevent them from seeing queued appointments.
- **Confirmation Redirect URL:** Redirects to this URL upon completion. Supports any appointment shortcodes.
- **Contact Me Redirect URL:** Redirects to this URL when contact requests to be contacted for scheduling options.
- **Custom Fields:** Allows you to select which custom fields should be visible to the customer in the online scheduler.
- **Proposal Templates:** Allows you to select the proposal templates that are available for contacts to select from in the online scheduler

Slot Searching

For the self-scheduling feature to work, service agents must have scheduled availability and must **not** be marked as **Internal Only**. If all agents are marked as "Internal Only," no available slots will appear in the self-service scheduler.

Availability

General	Active <input checked="" type="checkbox"/>
Skills	<input type="checkbox"/>
Cost and Compensation	Start Date <input type="text" value="5/2/2024"/>
Routing	End Date <input type="text"/>
Availability	<input type="checkbox"/> Internal Only Resource only available through serviceminder app
Start Address	<input type="text"/>

If an agent's end date is in the past, they will automatically be made inactive.

Tracking Leads

Tracking which campaigns generate the most revenue is essential for refining your marketing strategy. The online scheduler supports **Channel** and **Campaign** tracking, enabling detailed performance analysis.

Your scheduler URL can include two parameters: **channel** and **campaign**. For example:

https://serviceminder.io/service/*unique-id*?channel=*channel-id*&campaign=*campaign-id*

When included in the URL, these parameters help attribute lead sources to specific campaigns, even for contacts who do not schedule an appointment. You can then use the **Lead Source Revenue Report** to measure the success of various campaigns.

Learn more about [Channels](#), [Campaigns](#), and [Revenue Forecasting](#).

How to Track Leads

There are three primary ways to track leads from the Contact Portal:

1. **Default Online Scheduling Link:** This will use the settings defined in **Control Panel > General**. Learn more at [General Settings](#).
2. **API Key Link:** This uses the settings from the chosen API key (if present), or defaults to what's set in **General**.
3. **Custom URL:** You can manually append **Channel** and **Campaign** parameters to the URL. This is not recommended unless you have a web team handling redirects and tracking.

Using an **API key** is the most effective method to track and customize leads from your scheduler. More on this below.

Using an API Key

The online scheduler allows you to add API keys, which offer several benefits:

- Contacts and appointments created via the scheduler are tagged with the API key for easier tracking.
- You can differentiate performance across different sources by using unique API keys (e.g., one for your

website, another for a digital ad campaign).

- API keys automatically apply the specified **Channel** and **Campaign** to new contacts and appointments.

To set up:

1. Create an API key in **Control Panel > API Keys** (Learn more about that process [HERE](#)).
2. Go to **Control Panel > Scheduling**, and in the **Scheduling API Key** dropdown, select your API key.
3. **Copy** the new **Scheduling URL** that populates.

Scheduling API Key

--Select one-- ▼

Scheduling Url

<https://serviceminder.com/service/schedule/badf51bd67065b5ddf27ebe5ec5a9edf> | [Copy](#)
3 displays | [Reset](#)

Add this link to your website to link to the Scheduler for online appointment booking.



Important: Do NOT click Save immediately. Instead, copy the new URL, which will include the unique API key at the end. This URL can now be used for scheduling links on emails, websites, etc.

The API key allows you to track leads from specific campaigns, helping you measure the effectiveness of different marketing channels.

FAQs

How do I get the online appointment scheduler to show something other than the first available slot?

In **Control Panel > Scheduling**, look for **Open Time Granularity**. If left blank, it defaults to showing the first available slot. Setting it to an hourly or custom interval will allow customers to choose specific timeslots, and this setting will apply across all appointments.

Can a contact reschedule an appointment via the self-scheduler?

No, contacts cannot reschedule once an appointment is made. They would need to call the office (or a specific scheduling number) to reschedule.

How will I know if an appointment was scheduled via the online portal?

Appointments scheduled through the portal will appear immediately on the calendar, and both the customer and the office will receive automated notifications.

What if I have a large territory and want to limit how far agents travel?

In **Control Panel > Scheduling**, you can set a **territory radius** to limit scheduling. For example, if you set a 30-mile radius, customers outside of that area will be prompted to contact the office directly.

What are the steps for setting up the portal in my organization?

1. **Control Panel > Scheduling:** Check the **Online Scheduling** box and get the scheduler URL. You can email this to contacts or add it to your website.
2. **Control Panel > Services:** Edit services to enable **Self Scheduling**.
3. **Control Panel > Service Agents:** Ensure agents are available for scheduling by unchecking **Internal Only** for agents you want to appear in the portal.

Do we need to enable both Online Scheduling and Account Creation?

They are separate features but often enabled together. **Account Creation** allows customers to view their past appointments and invoices. **Online Scheduling** lets customers book appointments, either with or without an account. Both features can be used independently, but using both streamlines the scheduling experience.

What can a contact (customer) do without requiring a portal login?

Contacts can perform several actions without a contact portal account. All of the following items are accessed via a link that is sent to them via email or text.

- Schedule services (if you have self-scheduling enabled)
 - View and accept Proposals
 - View and pay Invoices
 - Update a card on file after a failed payment
 - Confirm an appointment
 - View "real time status" of an appointment (i.e., current ETA, how many stops ahead of them)
 - Leave tips
 - Update communication preferences
 - Review appointment reports sent to them
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