The Contact Portal and Self-Scheduling

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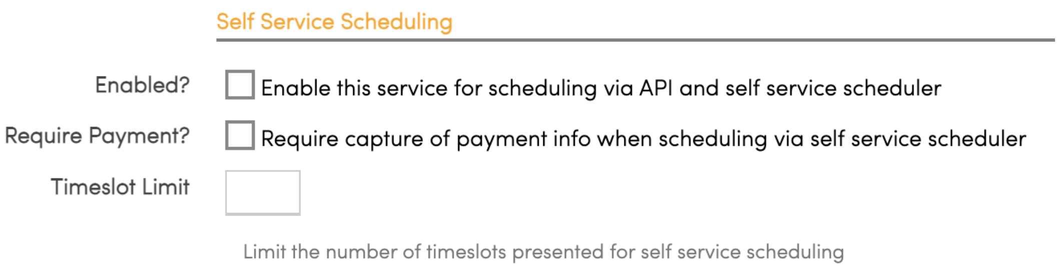
Overview

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:

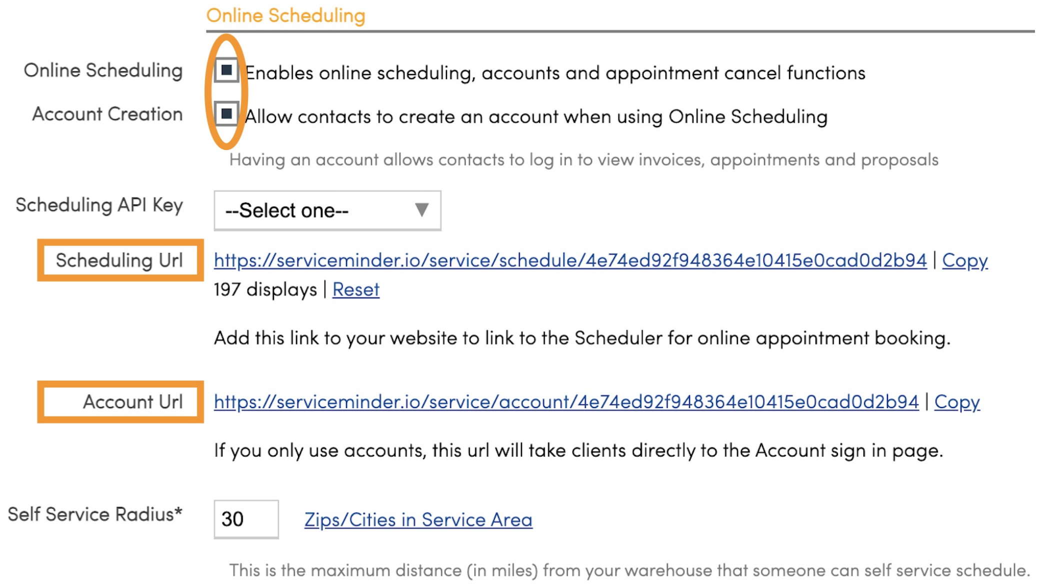
Settings and Navigation

First, you need to decide which services you want to offer self-scheduling, if any. You may want to offer scheduling of estimates, annual maintenance checks or system inspections, for example. You can do this by going to **Control Panel > Services** and editing any service you want to make available by checking the self-service checkbox as shown below:



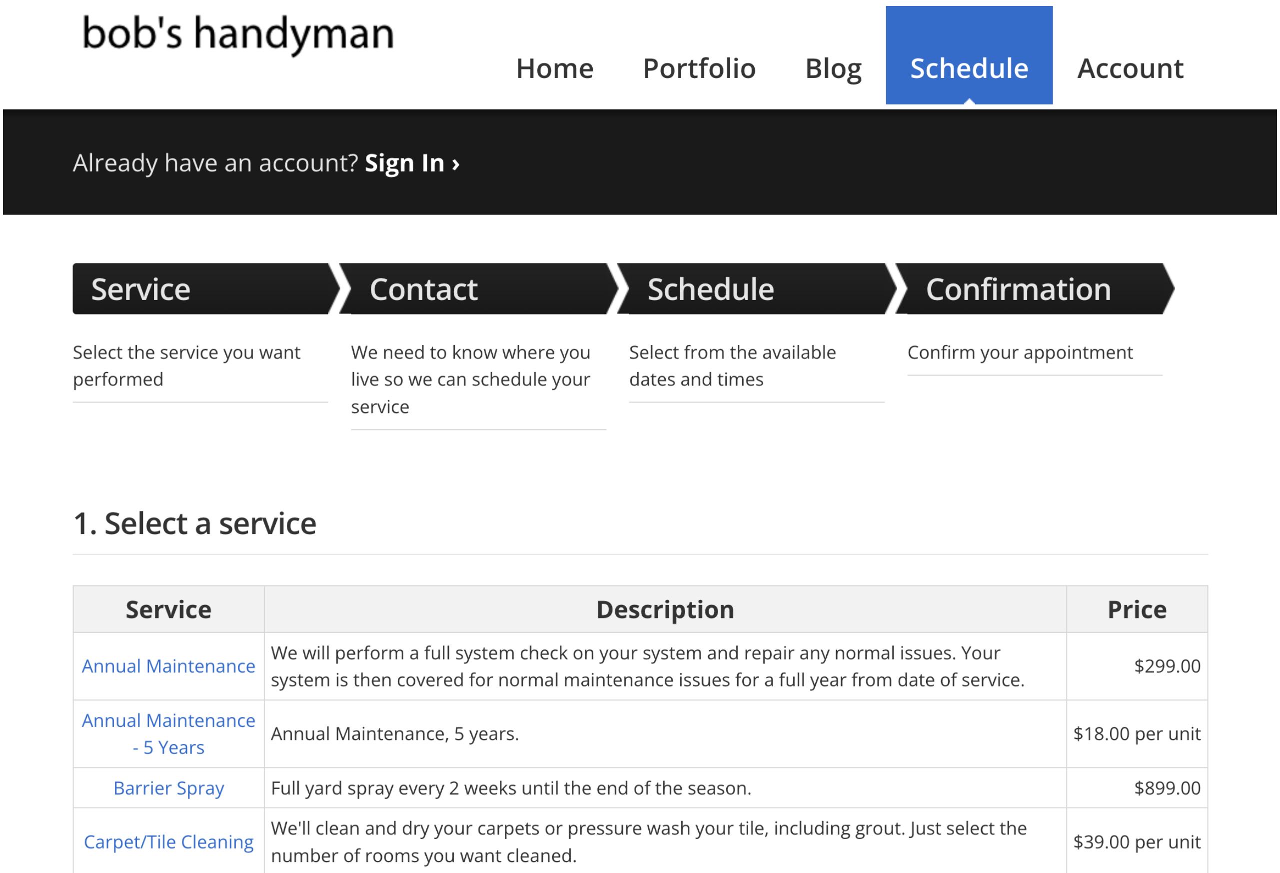
Once you've enabled the services you want to offer, then you'll need to enable the client-facing Contact Portal. You do this by going to **Control Panel > Scheduling** and scrolling down to the Online Scheduling section, shown below.

Check the Account Creation box first. Then, if you would like to allow customers to self-schedule, check the Online Scheduling box as well.



Note that you can choose the Account only URL - if you want your clients to be able to log-in to their account to view invoices, make payments and see appointments but NOT self-schedule.

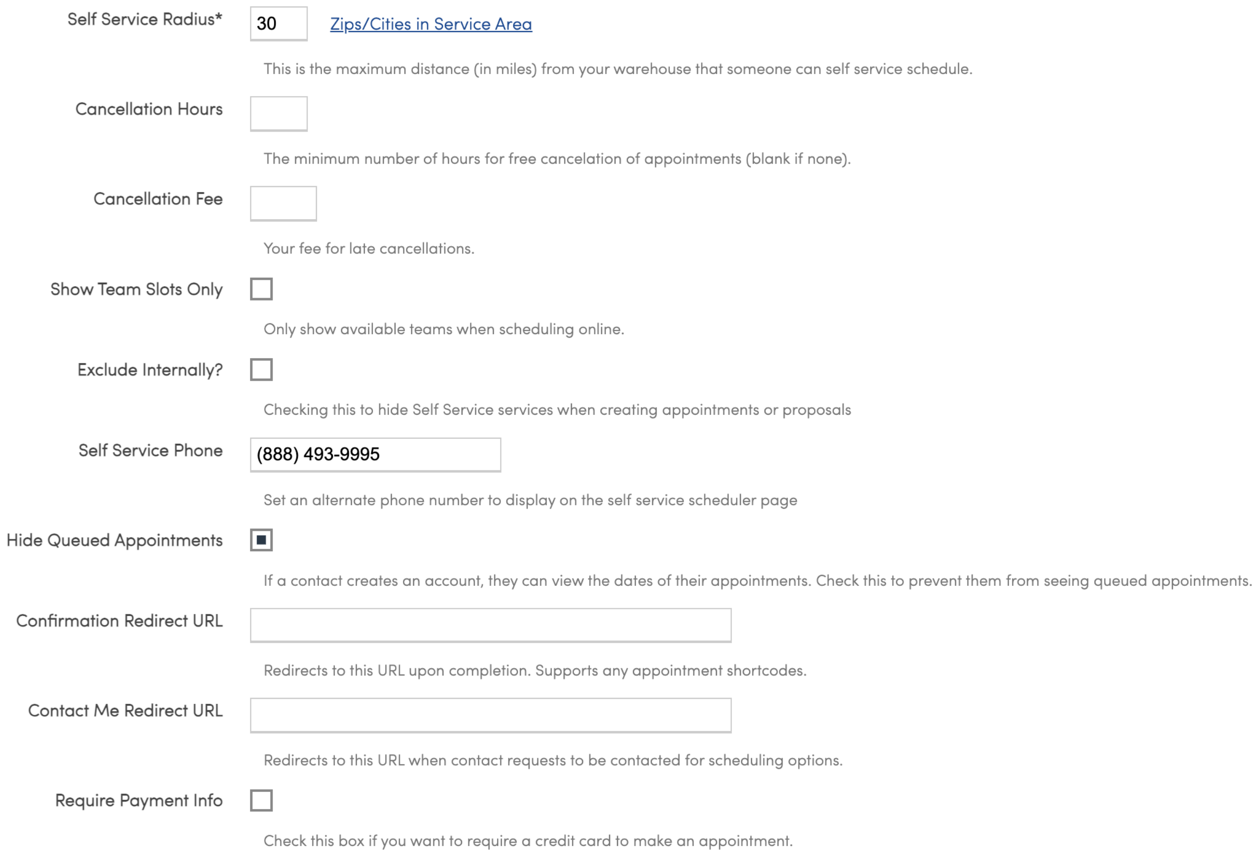
Then you can click the link to preview how the portal will look. Below is the top portion of the online scheduler where you can choose from the list of services.



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

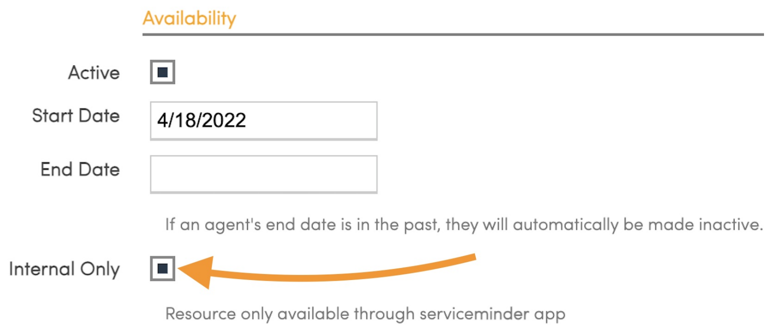
To add a link to the online scheduler on your website, click the Copy Link just below where it says*Click to Preview* and then add this as a link on your existing website. Users who click that link will then be taken to the online scheduler page to schedule their appointment.

The settings below the URLs control certain details about what is offered in the portal, such as how far away someone is allowed to be from your warehouse to be allowed to schedule as well as what your cancellation policies are.



Slot Searching

For booking, you'll also need to make sure there are service agents available - both with their scheduled availability as well as **not** being marked "internal." If all of your agents are marked**Internal Only**, then there won't be any slots available via the self-service scheduler.



Tracking Leads

There are three ways of tracking the leads using the customer portal.

1. With the default online scheduling link, it'll use whatever the default is in **Control Panel > General**. Learn more at General Settings.

2. With an API key link, it'll use whatever is set on the key, if empty default to what is set in General (see above link).

3. Last option is to append the Channel and Campaign to the URL yourselves, and that will set it on the customer. The last way is not really recommended. That works better if a web team is redirecting to the form from various places and want to track it.

The short answer is yes, you can track it without an API key but if you want more custom then the key is the recommended way.

Using an API Key

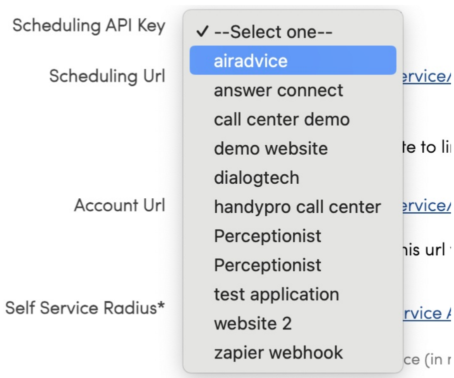
The online scheduler lets you add API keys. We list out your active API keys and let you choose one when generating a scheduler link. This has several benefits:

- Any contacts or appointments created through the online scheduler will get tagged with the API key you're using. This makes it much easier after the fact to find those contacts and appointments after they've been created/booked.
- You can track different sources for your scheduler links. For example, you might use one API key on your website. You could then use a different API key with a digital advertising API key. You can then compare the results from both to see which one performs better.
- Since API keys let you specify a channel and campaign, we'll automatically set your new contacts with the API key's configured channel and campaign.

First create a key (or use an existing key) in **Control Panel > API Keys**. Here's some guidance: API Key Configuration

Next, in **Control Panel > Scheduling**, scroll down to the **Online Scheduling** section.

In the **Scheduling API Key** dropdown, select your key.



IMPORTANT: Do NOT hit Save yet. Copy the **Scheduling URL** now; it changed dynamically when you selected your API key. This doesn't save on the page so if you go back to it, it will change back to the default URL with no API key saved.

Want to make sure you got it right? The unique hash on the end of the URL will match your API key so you can compare them to be sure.

Now that link can be used in an email, on a website, etc. and will have the setting from your API key, plus you'll be able to utilize drip triggers to focus on that API key.

Reporting on Channel and Campaign

Being able to determine which campaigns generate the most revenue is the key to figuring out where to invest in your marketing efforts. The Online Scheduler supports tracking Channel and Campaign information so you can ensure that your digital marketing or link building efforts are properly measured.

The Online Scheduler URL supports two parameters: **channel** for tracking the channel and **campaign** for tracking the actual campaign. Your online scheduler URL will look something like this:

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

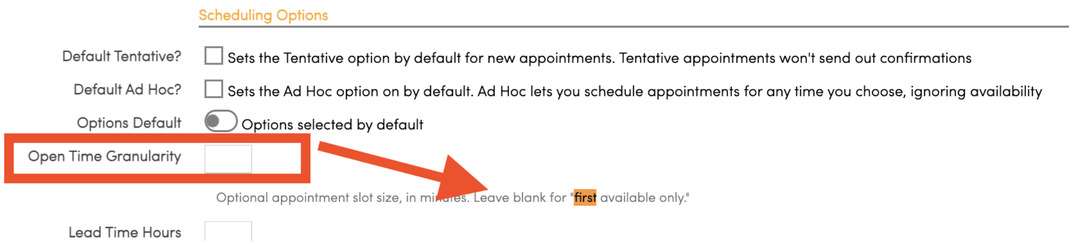
When the channel and campaign information is included in the url, any contacts that get created (even if they don't make it all the way to scheduling an appointment) will be created with that lead source information. Then any revenue they generate will be attributed to that campaign and you can then use the **Lead Source Revenue** report to determine which campaigns work better.

Learn more about Channels, Campaigns, and Revenue Forecasting.

FAQs

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

Go to **Control Panel > Scheduling** and look for **Open Time Granularity**. If that is blank, it will only show first available. If you set it for hourly, then it will show spots on the hour. Adjust it to whichever interval fits, be aware that this is a default setting so it may affect what auto pulls for an owner/Dispatch when they go to schedule.



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

No, they can only set up an appointment. The customer cannot edit that appointment once it has been made, so they will need to call the office (or you can set a specific online scheduling number) for them to reach out to and reschedule.

How will anyone know if the appointment has been scheduled via the online portal?

They will see it appear immediately on the calendar and they should get an automated notification similar to what happens if, for instance, an Office Admin schedules something in service**minder**.

What if I have a large territory and I don't want my agents driving too far?

In **Control Panel > Scheduling**, you can set the territory radius so you can limit if someone 30 miles away or 10 miles away is outside the radius. If someone does try to schedule from outside the set radius, they will see a message explaining that they need to call the office to schedule.

I'm confused, what are the steps for getting this set up in my org?

First, you need to go to **Control Panel > Scheduling** and check one or both the boxes: **Online Scheduling.** Then you get the url, which you can email to a single Contact or multiple contacts. Or you can even add that link to your location's website for potential customers to access.

Second, you need to set which Services are available to for self-scheduling. Go to **Control Panel > Services**, and **Edit**. There is a section called "Self Scheduling", so please review your options. You can set things like you don't want day-of appointments or how many time slots are shown to the customer booking. Around 10 is the default option, so you can limit it to 3 if you want.

Finally, you need to make sure a Service Agent is available for self-scheduling. Go to **Control Panel > Service Agents > Edit**. There is a checkbox for "Internal Only" if that is on, they cannot be viewed in the online scheduler. You will need to uncheck the box if you want that Service Agent's schedule to show as available.

Do we have to turn on both Online Scheduling and Account Creation? Are they different?

They are different but they pair nicely together so many brands have both turned on but you can certainly do one or the other without problems. Here are some details:

- **Account Creation** means that I as a customer have access to my account with all my past appointments, invoices, etc. available for review. SM was set up so that a customer doesn't have to have this. You can leave this feature turned off and customers still receive anything they need from you.
- **Online Scheduling** means that I can go create an appointment for myself. I can still make an appointment without an account, but my info will be saved from my account (once I log in), which means I wouldn't have to fill out my name, address, and email when booking an appointment.