

Contact Notifications and the Online Contact Portal

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Overview

Contacts can receive notifications about various phases of their experience when working with your business. This article will review how to customize those notification settings to best suit your needs.

This article will review:

- [Contact Notification Settings](#)
- [Contact Notification Preferences](#)
- [Online Contact Portal](#)

Contact Notification Settings

In **Control Panel > Notifications**, you can configure your preferences for various notifications to send to your contacts.

Settings Tab

Invoice Notifications

You **must** come here and check this box when you are ready to start sending invoices to contacts. By default, it is turned off so that no invoices are sent before you have finished learning your way around and figuring out your preferences. You can also set how frequently you'd like to send Invoice Reminder emails.

Invoice Notifications

☒ Email Invoices/Receipts to Contacts?

Invoices and receipts will be sent to bobhandyaustin@serviceminder.com if this is not checked.

Invoice Reminders

15

How many days between invoice reminders?

Appointment Notifications

In this section, you will configure reminder notifications you'd like to send to contacts. This includes all reminders (service, invoice, and proposal), En Route notifications, and resending appointment notifications.

Appointment Notifications

En Route Window

minutes

Include all appointments within this window when sending

☒ Include Calendar Attachment?

Attaches calendar events to appointment confirmation emails.

☒ Download Calendar Attachment?

Allow calendar downloads from confirmation page.

Resend Confirmations?

☐ Turn this on to resend appointment confirmations before the appointment's scheduled start date.

days before appointment at

How many days before the appointment to send and at what time?

☐ Include Queued Appointments?

Confirmation emails won't go out for queued appointments unless this is enabled.

- **En Route Window** - That setting in **Control Panel > Notifications > Settings** tab, allows you to designate a frame of time that all en routes will send. If you have 30 minutes in that field and you finish an appointment the system will look for all future appointments within that window. For any that have not had their en route already sent, the notifications will send. It is only going to look at appointments scheduled between the current appointment and the next "window" minutes ahead.
- **Include Calendar Attachment** - Attach calendar events to appointment confirmation emails
- **Download Calendar Attachment** - Allow calendar downloads from the appointment confirmation page
- **Resend Confirmations** - Turn this on to resend appointment confirmations before the appointment's scheduled start date
 - Set how many days before the appointment you want to send the reminder
 - Choose whether or not to include Queued Appointments in the confirmations being sent

Payment Notifications

Select the **Installment Reminders** checkbox if you would like to send reminders about payments for installment plans, if you have those set up. Set how many days before the payment and what time of day you want to send the notification.

Payment Notifications

☐ Installment Reminders?

Turn this on to remind your customers of upcoming installment payments.

Days Before Payment

Time to Send

Recurring Billing Notifications

Check the **Recurring Billing Reminders** box if you would like to send reminders about payments for recurring billing plans, if you have those set up. Set the time of day that you would like to send those reminders.

Recurring Billing Notifications

☐ Recurring Billing Reminders?

Turn this on to remind your customers of upcoming recurring payments.

Time to Send

8:00am

Turn Notifications On/Off Tab

On this page you will see various notification types, as well as checkboxes that allow you to turn them on/off for Contacts, Users, and Service Agents. Read through the choices and check the box for any notification you want to be able to send out to your Contacts. Many of these notifications are intended for internal use only and you will not see the option to enable them for contacts.

Notifications			
Settings Turn Notifications On/Off			
Type	Contacts	Users	Service Agents
Appointment Acknowledged	☐	☐	
Appointment Cancel	☒	☐	☒
Appointment Complete	☒	☐	
Appointment Confirmation	☒	☒	☐



Note: If Invoice Reminders are off and you turn them on, it will only apply to invoices generated moving forward from that point.

Invoice Reminder

☐☒

Contact Notification Preferences

There are also settings that the Contact can control related to their notification preferences. They can decide if they want email or text communications. These privacy settings are legally mandated and cannot be controlled by serviceminder or your business.

If a contact uses the Unsubscribe link at the bottom of an Ad Hoc Email, you will see on their profile that they are Unsubscribed. This may cause certain emails to bounce that are not marketing related. If this happens, contact your brand team or serviceminder support team and we can research the bounce for you.

Name John Doe
Primary Phone [\(111\) 111-1111](#)
Alternate Phone [\(222\) 222-2222](#)
Email johndoe@fakeemail.com | [Send Account Invite](#)
Last Touch 6/17/2025 11:26a
Unsubscribed? Yes
Service Address 1234 Easy Street | Austin, TX 78746 [✎](#) | [Copy](#)

Be cautious of the messages that you send, especially around texting. We are not your legal counsel, and we urge you to consult with your marketing or legal teams about what is or is not allowed in your email or text communications to clients.

Both email campaigns and texting will be discussed in greater detail in later learning modules.

Online Contact Portal

You can give your customers the option to create an account and manage some of their preferences online in the Contact Portal.



For clients that have customers in Canada, there is a French version to comply with Quebec regulations to provide both French and English versions of customer-facing communications. It is based on your browser settings/preferences and may automatically appear in French based on the IP address.

First, you must enable the Contact Portal in **Control Panel > Scheduling > Online Scheduling**. The customer portal is connected to online scheduling, so check **both** boxes for customers to be able to access it.

Online Scheduling

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



If you do not want to allow self-scheduling for your customers, don't worry that the online scheduling needs to be checked. If you do not enable Self-Scheduling for any of your services (in Control Panel > Services), this will not be provided as an option.

Once you've turned that on, an Account Invite link will appear beside your contacts' email address. Send that and the customer can set up their account.

Contact

Name John Doe

Primary Phone [\(111\) 111-1111](#)

Alternate Phone [\(222\) 222-2222](#)

Email johndoe@fakeemail.com [Send Account Invite](#)

Service Address 1234 Easy Street | Austin, TX 78746 [✎](#) | [Copy](#)

Here is a peek at what a contact might see when viewing the portal on their phone:

FAQ

Is there a report that tells me how many contacts have online accounts?

There is a column on the **Contacts Grid**. You can filter and download the list on that grid. Remember that you may have used the Column Chooser button to hide certain columns, so if you don't see it check to make sure you don't need to activate that column.
