Create A Contact

06/09/2025 10:02 am CDT

Overview

This article will review:

- Settings and Navigation
- Contact Details
- Address
- Measuring Contact Location Area
- Contact Notes
- Flash Message
- Contact Referrals
- FAQs

Video Tutorial

Your browser does not support HTML5 video.

How to add many contacts at once by uploading a .csv file.

Settings and Navigation

When adding a new Contact, fields with a star (*) beside them indicates that those fields are required.

You may bulk-import Contacts from a .csv file (it <u>must</u> be this file format), or you can create Contacts one at a time.

This is an example of how most of the grids appear. If you're on a page that also supports adding new items, there will be an **Add** link in the first column. Clicking that link will take you to a page to create the new item.

Contacts ld Name Zip Q Q Q Q Q Q Edit 7358454 Barb Dwyer (444) 444-4444 barbara@fakeemail.com 1640 Riverside Drive Austin тχ 78741 Edit 7358458 Bella Notte (888) 888-8888 beautifulnight@fakeemail.com 4222 Clinton Way Austin ΤХ 78701 Edit 7358459 Brighton Early (999) 999-9999 brightonearly@fakeemail.com 17 Cherry Tree Lane Austin ТΧ 12345

Note: Your **Add** column may be on the far right side of the screen. You can leave it there, or you can move it by right clicking the column header (where it says "Add") and choosing **Fix > To the Left**.

pe	aign	API Kev Q	v Add
		To the left	Fix ►
		To the right	Unfix
			<u></u>

Add A Contact from the Shortcut

This page is a shortcut so that it appears in the left-side navigation panel for easy access.



Contact Details

Much like the Contacts grid, the **Contact Details** page will give you an overview of all the contact's settings and information at a glance. Some settings won't show up because they aren't configured or turned on, so you may not see all of these fields (or there may be more than appear here.)

i

The blue pencil indicates you can make a quick edit to that field. Blue "X" indicates you can make a quick removal in that field.

Name	Bart Simpson - Bart Simpson Enterprises			
Company	Bart Simpson Enterprises			
Phone	(214) 123-4567 Send Text			
Email	bart simpson@serviceminder.co Send Password Reset			
Last Touch	9/1/2021 11-22g			
Service Address	9206 Blue Water Dr. Plano TX 75025 2 Copy	Auto	to Pay Yes	
Community	Villar At Dideouiow Danch	Subscription Ho	Hours 4.5 Avail 3 Used	
Contracting	Collin County	Lifetime Vo	Value \$55,050.80	
County	Is mine (77 m)	Bala	alance \$42,761.38	
Drive	15 mins (7.7 mi)	Managed Lifetime Va	Value \$22,878.21	
GeoZones	My_lemitory Plano	Managed Balance [e Due \$20,703.27	
Named Tax Rate	TEXAS-PLANO-DALLAS MTA TRANSIT C	8/10/2022 Dep	eposit <u>\$587.50 Credit Card (ZGBCUE)</u> ×	
Accounting Class	Plano	Customer Si	Since 3/9/2012 (Annual Maintenance)	
Category	Customer	Last Serv	ervice 5/6/2022 6:04:11 AM	
Lead Source	Referral – Existing Customer	Next Annual Maintena	nance 7/38/3022 Timeline	
Tags	Blue, bub, Demolition, Landscape Lighting, Pest Control 🖋	P	Plan	
Active Task Boards	Job Board (Drafting) 🗙 , Sales Process (Not Contacted.) 🗙 🖋	Default En Ro	Route Text message to (214) 123-4567	
Final Task Boards	Sales Board (Demo) 🗙 , Sales Board (Demo) 🗙 ,	Routing Constra	traints Edit	
Card on File	XXXXXXXXXXX5454 - 10/2023 (juan) <u>Clear</u> 🖋		ID 2517	
		Crea	eated 1/8/2012 8:04p	
		Last Upda	dated 9/1/2022 12:47p	
Favorite Picture	Q PX		Add Name Email Phone Notifica	tions
		Additional Conte	Nacts Lisa Lisa imeson@serviceminder.co Invoices Simpson 5 To Prop	outes, T /Receip losals
		Property Move	Parts Other	
		Account Me	Manager	
		Number of	of Zones	
		Square F	Footage	
		Number o	r of Trees 10	

Payment Info

- Balance do they have any outstanding bills
- Pending payments (like upcoming installment payments) do they have transactions set for the future
- Credit Hold It's an internal check box used to mark an account if the customer is overdue on invoices. It's just a visual cue.
- Deposit
- Card on file do they have a card on file; they must have a card on file to start auto pay
- Auto Pay on or off do they have auto pay set up
- Consolidate Payments on or off
- Lifetime value what is the total profits from this contact
- Accounting class is their an accounting class mapped to that contact

Marketing/Sales Info

- Category contact categories can be Customer, Opportunity/Prospect, Vendor/Partner, etc.
- Tags you or the brand team can create tags such as canceled, DNC (do not contact), or marketing-based tags like "offer Spring 2024".
- Lead source (channel/campaign) how did they hear about you; examples: Facebook ad, submitted a inquiry form request
- API Key (name of key if lead capture via an API method)
- Taskboards if you use taskboards, it will tell you where they fall on your workflow
- **Contact owner** do you have a User (employee) assigned as an owner to that lead; this is primarily used if you have more than one sales agents divided by territories

Communication Settings

- En routes
- Confirmations
- Email declined or not the contact specifically refuse to give you or your call center agent an email
- Unsubscribed yes or no they unsubscribed from marketing emails
- Do not mail you do or do not want anyone to email this contact
- Additional contacts for instance, do they have a spouse who's contact info you want to connect to this main Contact?
- Managed by if you have a property manager that has many apartment complexes or office buildings, this creates a owning Contact that receives all the invoices but allows for multiple service addresses for your techs to go to the correct location (not the Property Owner billing address)

Contact Edits

- Created when when was the Contact created/added to the SM system
- Last updated when was the last time this Contact was updated in SM
- Last touch (the last manual communication made with the contact, can be via text or email (automated emails don't count,) as well as notes or tasks)

Appointments

- Last appointment/service
- Next/upcoming appointment
- Geozone

Extras

- Favorite picture
- Contact custom fields
- Flash message

Address

The service **minder** system pulls in the address from the information contained within the top search box and will automatically fill in the empty fields based on that address. If you are having issues with **Dispatch**, it is because they are not doing this step correctly.

	Service Address	
Q	Enter a location	<u>Google</u> ⊡
Address 1*		_
Address 2		
Community		
City*		
State*		
Zip*		

The most important aspect of inputting a Contact is their Service Address. Many settings and features rely on this being complete and accurate. You will want to <u>use the search box</u> to add the address, *even if* you already know it and can type it into the individual fields.

Diagnosing Address Issues

Problems

You will know you are having issues if an address seems to be:

- failing to populate
- failing to appear on the map
- including extra or missing characters

Solution

If you experience these issues, then use the pencil icon next to the Service Address or the ellipsis next to the Billing Address to open the address edit tool.

Contact	Proposal Schedule Marge Edit Delete	
Name	Ken Garage	
Phone	(<u>324) 444-4545 (Mobile) Send Text</u>	
Email	<u>ken.garage@serviceminder.co</u> <u>Send Account Invite</u>	
Service Address	3456 Granada Ave Dallas, TX 75205 🖋 <u>Copy</u>	
Community	Park Cities	
County	Dallas County	
Drive	23 mins (18.9 mi)	
GeoZones	75205 North Dallas Tuesday	
Category	Customer	
Lead Source	Direct Mail - New Homeowner	
Tags Countertops, Direct Site Traffic, Organic Search, Pest Control 🖋		
Card on File	XXXXXXXXXX5454 - 10/2024 (Ken Garage) <u>Clear</u> 🖋	
Auto Pay	Yes	
Billing Address	3457 Granada Ave Dallas, TX 75205	
Lifetime Value	\$10,244.00	

Don't Forget to Refresh!

Refreshing will attempt to geocode the address, to locate its correct position on the map. If your address failed to geocode, is missing, or is incorrect, ensure the invalid checkbox is unchecked below and make any necessary corrections. If the address can't be found, the address will remain invalid and will not show up on the **Mapping** view.

The **Debug...** button will display the results of the geocoding attempt.

Measuring Contact Location Area

On the contact screen, the **Maps** tab under additional details can be used to measure anything exterior at the contact's location.

If your business is an outside service (mowing, concrete, landscaping, lighting, pest control, roofing, fencing, etc.,)

wouldn't it be great to see, ahead of time, what square footage/acreage/linear feet the project may entail.

By clicking the **Measure** blue link at the bottom left corner of the map, the user can creat one or multiple shapes on the map, which will give acreage/square footage/linear feet of that shape.

A user can edit these "shapes" on the map - to add or subtract from the total area.

Watch the short training video here!

Contact Notes

This is an area on the Contact Details page that allows you to put information about the appointment or the location, or even about the Contact themselves. You can make the information private, so only the owner of the Contact can see the actual message. Others will only be able to see that a note exists. The Contact never sees this information.

Go to **Control Panel > User > 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**. This allows the User to see general notes.

There is a second layer of notes that you can grant or deny access to. These are private notes, usually franchisees reserve this permission just for themselves or the office admin. If your notes are marked as **Private** then you need to grant the User permission next on the list, **Contacts:Notes:View:Private**.

Flash Message

A **Flash Message** is an orange banner message that can be created at a contact, appointment or invoice level on a customer record. It's purpose is to display a really important message regarding a contact or for a specific appointment. It is an internal display only, to SM users and service agents.

Don't forget to close and lock the gate					
Service	Service Recurring Dog Walk				
Scheduled Start	<u>Wednesday, March 17 at 8:00a</u> 🗌 Confirmed				
Scheduled Duration	30 mins				
Quantity 1					
Contact	Hamilton 🖋				
Phone	(<u>111) 123–5555 (Home)</u>				
Lead Source	Existing				
Where	Ellard Drive Roswell, GA 30022 <u>Copy</u>				

Contact Referrals

When you use the {contact.refer_url} shortcode in serviceminder and send it to a contact, it generates a unique referral link for each contact.

Hello Katie Test!	
We love referrals!	
Know somebody that you think could use our servi Just fill out the form and hit the Refer button below Name *	ces? Send their info our way and we'll take care of them! v.
Henry Peterson	
Email *	
thisisafakeemail@pretend.com	
Phone *	
1114443333	
Message	
Referral from Katie Test	
* Required fields	
Refer!	

When someone clicks this referral link and submits the information of the person they are referring, the new lead is automatically created in your organization and attributed to the original referring contact.

- The new lead created via the referral link is added to your ServiceMinder account as a new contact (lead).
- The system records the referring contact (the original customer/client) as the source of the referral on the new contact's details page.
- This allows you to track which of your existing contacts are generating referrals and new leads.

Contac	t	
	Name	Henry Peterson
	Phone	(111) 444-3333 Send Text Call
	Email	thisisafakeemail@pretend.com Send Account Invite
N	amed Tax Rate	None 2
	Category	Prospect
	Lead Source	none
	Referred By	Katie Test
	Tags	Ø
Addit	tional Contacts	Add

FAQs

If I want to add a note under client's profile, will leaving the "Private" unchecked give the client visibility to that note? Or does "private" mean only client owner can see the note?

Any notes in the contact card cannot be seen by the Contact. **Private** means that only the contact owner can see the note.

I made a note and other employees can see it. Is this a user setting?

Yes, you need to go to **Control Panel> Users> Edit User> Permissions**. Scroll down to the section that says **Contacts:Notes**.

There are two categories they need to mark as either **Grant** or **Deny**.

Is there a way to have the property address included in the automated texts & emails for our clients?

Yes! We have a list of shortcodes that will automatically pull that information into a text/email template. The shortcode you would most likely want to use is .

You can edit the body of texts/emails in two places in the **Control Panel > Automated Emails** (or) **Ad Hoc Emails**.

Is there a way to get it so that pictures taken at the appt level can be saved to the customers profile?

The pictures taken in the app before/after the appointment are saved to the customer's profile in the "pictures" tab.

Additional Details								Timeline	
Мар	Notes (4)	Proposals (31)	Emails (119)	Referrals ((1)	Manageo	d Contacts (1)	Texting (25)	
Арроіг	ntments (47)	Invoices (164)	Pictures (17)	Videos	Doc	cuments	Tasks (21/23)	Drips (10)	Feeds
Check	lists Assets	s		_					

Troubleshooting

En Route isn't working for this Contact.

Check the address on the Contact Details page. If it is red, the address cannot be located, which means it isn't geocoded correctly in the service **minder** system. It stops the en route from being sent manually since it won't calculate drive time.

If an address doesn't automatically geocode, you can manually fix it by using the pencil next to the address on the Contact Details page. That will let you manually drag and drop the pin on the map or you can copy/paste lattitude and longitude from Google to get a valid address.

Thought, that doesn't guarantee accurate drive time calculation if ithe system thinks it can't find how to drive to the pin. So the agent can get to the location and pin the location accurately so that this problem is fixed for next time.