

Create A Contact

01/02/2025 11:35 am CST

Overview

This article will review:

- [Settings and Navigation](#)
- [Contact Details](#)
- [Address](#)
- [Measuring Contact Location Area](#)
- [Contact Notes](#)
- [Flash Message](#)
- [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.

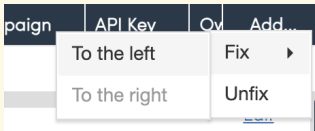
You may bulk-import Contacts from a .csv file (it must be this file format), or you can create Contacts one at a time.

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									
25									
Add...	Id	Name	Phone	Email	Service Address	City	State	Zip	
	q	q	q	q	q	q	q	q	q
Edit	7358454	Barb Dwyer	(444) 444-4444	barbara@fakeemail.com	1640 Riverside Drive	Austin	TX	78741	
Edit	7358458	Bella Notte	(888) 888-8888	beautifulnight@fakeemail.com	4222 Clinton Way	Austin	TX	78701	
Edit	7358459	Brighton Early	(999) 999-9999	brightonearly@fakeemail.com	17 Cherry Tree Lane	Austin	TX	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**.



Add A Contact from the Shortcut

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

Shortcuts

Add a Contact

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.)



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.

Don't contact before 10am

Name

Bart J 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 11:22a

Service Address

9206 Blue Water Dr | Plano, TX 75025 | [Copy](#)

Community

Villas At Ridgeview Ranch

County

Collin County

Drive

15 mins (7.7 mi)

GeoZones

☐ [My Territory](#) ☐ [Plano](#)

Named Tax Rate

TEXAS-PLANO-DALLAS MTA TRANSIT [🔄](#)

Accounting Class

Plano

Category

Customer

Lead Source

Referral - Existing Customer

Tags

[Blue](#), [bub](#), [Demolition](#), [Landscape](#), [Lighting](#), [Pest Control](#) [✎](#)

Active Task Boards

[Job Board \(Drafting\)](#) ✎, [Sales Process \(Not Contacted\)](#) ✎

Final Task Boards

[Sales Board \(Demo\)](#) ✎, [Sales Board \(Demo\)](#) ✎

Card on File

XXXXXXXXXXXX5454 - 10/2023 (juan) [Clear...](#) ✎

Favorite Picture

Auto Pay

Yes

Subscription Hours

4.5 Avail 3 Used

Lifetime Value

\$55,050.80

Balance

\$42,761.38

Managed Lifetime Value

\$22,878.21

Managed Balance Due

\$20,703.27

8/10/2022 Deposit

\$587.50 [Credit Card \(ZGBCUF\)](#) ✎

Customer Since

3/9/2012 (Annual Maintenance)

Last Service

5/6/2022 6:04:11 AM

Next Annual Maintenance

7/28/2022 [Timeline...](#)

Default En Route

Text message to (214) 123-4567

Routing Constraints

[Edit...](#)

ID

2517

Created

1/8/2012 8:04p

Last Updated

9/1/2022 12:47p

Additional Contacts

Add...	Name	Email	Phone	Notifications
✎ ✎	Lisa Simpson	lisa.simpson@serviceminder.co		To En Routes, To Invoices/Receipts, To Proposals

Property

Move

Parts

Other

Account Manager

Number of Zones

Square Footage

Number 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 there 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 serviceminder 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

Google

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 [use the search box](#) 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

Merge

Edit

Delete

Name

Ken Garage

Phone

(324) 444-4545 (Mobile) | [Send Text](#)

Email

ken.garage@serviceminder.co | [Send Account Invite](#)

Service Address

3456 Granada Ave | Dallas, TX 75205 [Copy](#)

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) [Clear...](#)

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.

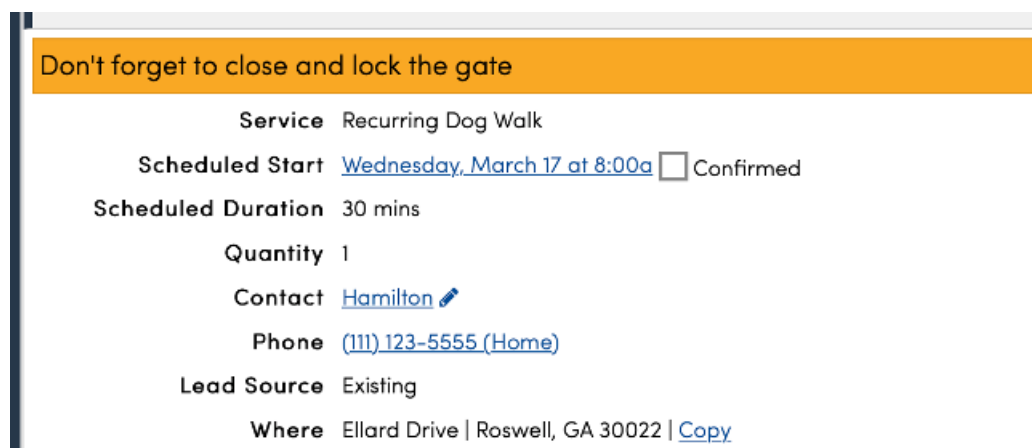
Go to **Control Panel > User > Edit** their user. Go to **Permissions** tab at the top of the page and you will see a list of options to "Grant" or "Deny". You will want to grant them access for **Contacts:Notes**. This allows the User to see general notes.

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.



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

[Research ▼](#)[Timeline](#)

Map	Notes (4)	Proposals (31)	Emails (119)	Referrals (1)	Managed Contacts (1)	Texting (25)	
Appointments (47)	Invoices (164)	<u>Pictures (17)</u>	Videos	Documents	Tasks (21/23)	Drips (10)	Feeds
Checklists	Assets						

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 serviceminder 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 latitude and longitude from Google to get a valid address.

Thought, that doesn't guarantee accurate drive time calculation if the 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.