General Settings

11/05/2024 4:59 pm CST

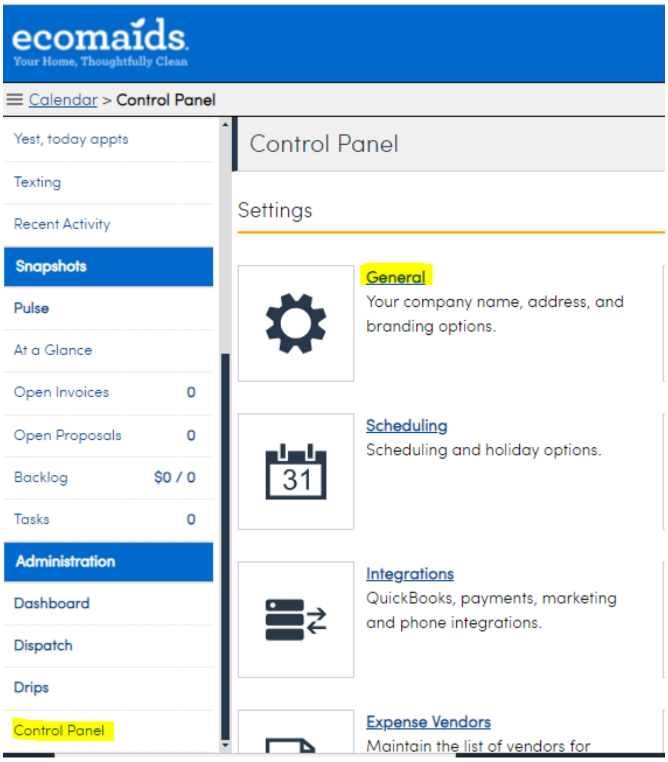
Overview

To fill in your general business information, go to **Control Panel > General Settings**. This article will review each section of this page.

Please note that only certain User Permissions can access this area of service**minder**.

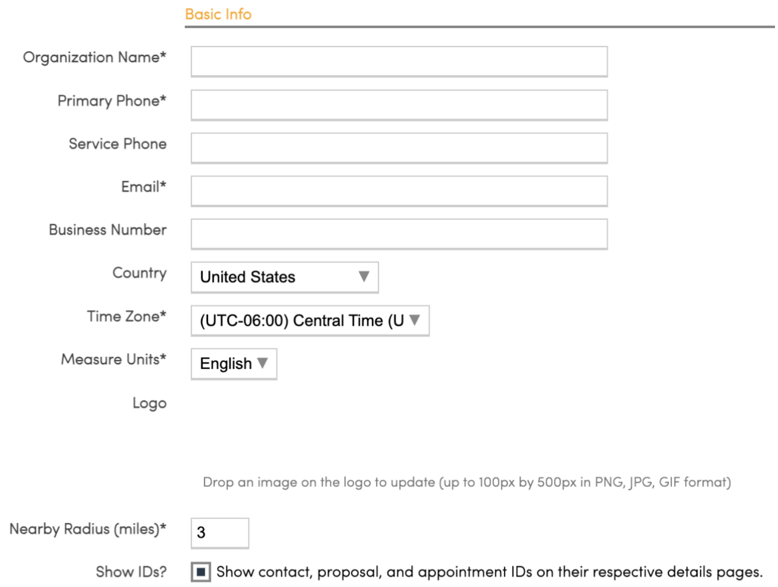
This article will review:

- Basic Info
- Features
- Links
- Warehouse Address
- Other Settings



Basic Info

Here you will fill in basic contact information for your organization. These fields will be displayed in various communications with the use of shortcodes, so use information that you want customers to be able to see.



Anything with a star (*) means that it is required. If you do not fill in one of the required fields before attempting to save the page, you will get an error message.

Required Fields:

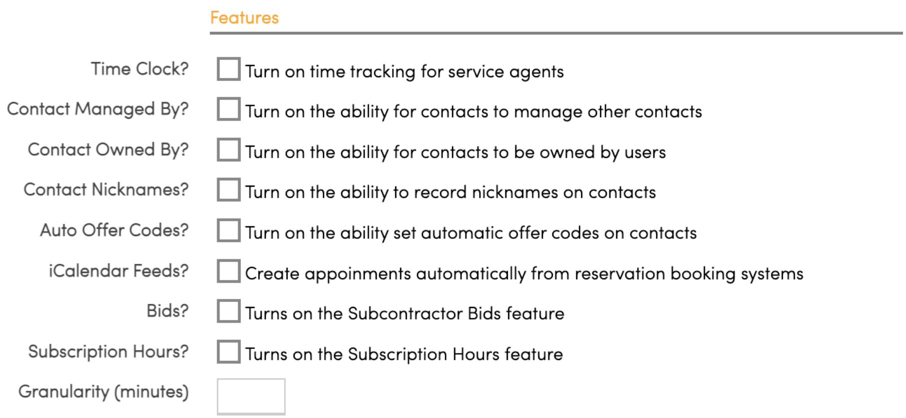
- **Organization Name** - This is client-facing, so write it how your clients will know your business (follow brand guidelines if you are unsure).
- **Primary Phone** - This will be your location's main phone number; whatever number you want customers to call, this is what to put in this field.
- **Email** - This will be the main email address to receive and send customer communications.
- **Time Zone** - The system uses this for your calendar and scheduling; it will also be used for time stamps on receiving/sending emails or marketing messages.
- **Measure Units** - English or Metric; you will most likely choose English if you are U.S. or Canada-based

Optional Fields

- **Service Phone -** A secondary phone number with its own shortcode to provide to contacts.
- **Business Number -** Enter your BIN or EIN here
- **Country -** This field will default to United States. Changing this to another country will impact the postal codes you are able to enter into the system.
- **Logo -** Upload your company logo here and it will display on proposals and invoices sent to your customers. If you are part of a franchise, the brand will handle this for you.
- **Show IDs? -** Choose whether or not you want to display IDs on contact, appointment, and proposal details pages.

Features

This section includes some master on/off switches for various features within service**minder**.



- **Time Clock -** Enable the ability for employees to Clock In & Out.
- Learn more about **Contact Managed By** and **Contact Owned By** in the article Managing and Merging Contacts.
- **Contact Nicknames -** Enable an additional field that collects nicknames or alternative names for contacts.
- **Auto Offer Codes -** Set automatic Offer Codes on contacts
- **iCalendar Feeds** - Create appointments automatically from reservation booking systems
- **Bids** - Enable this feature if you will be using Subcontractors who will provide bids for jobs
- **Subscription Hours**
- **Granularity (minutes)**

> Beyond Time Clock, Contact Managed By, and Contact Owned By, many of these features are specified by industry and most organizations do not need them. You can always return to this page when you have more experience in service**minder** and a clearer picture of what features would be beneficial for your business.

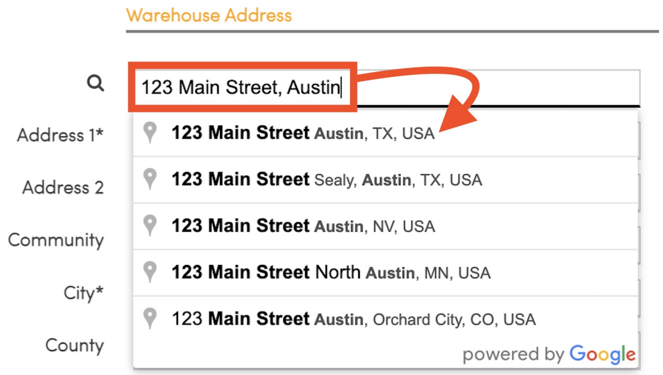
Links

The next section, **Links**, has dedicated fields for adding various social media URLs. This will be your location's website and social media accounts (not the brand website). These will be customer-facing on proposals, invoices, and emails.

Warehouse Address

The final important step of General Settings is adding your **Warehouse Address**. Your Warehouse is the term we use for your office or whatever location is your HQ.

When adding an address, ONLY use the search box. The search box is the first field. It connects to Google Maps to pull in a verified address.



This address is used for routing, tax mapping, and more. It is incredibly important that you do not manually add the address, city, and postal code - even if you know it by heart. **ONLY use the search box.**

Other Settings

Nearby Radius

This option is used to help service**minder** determine where your service agents are allowed to go at certain times based on this radius. The center is located at your organization's Default Start Address, which can be edited a little lower on the page. service**minder** frequently attempts to organize your appointments based on an optimal route. By setting a central radius, service**minder** has an easier time determining a route based on this starting point.

Customer Messaging

There are several ways for you to interact with your customers. Enabling this option will allow you to begin customizing and sending different email templates to your customers. You can find the templates section on the Control Panel, which is located on the left side of every page under the 'Administration' tab.

Service Agent Inventory Tracking

Many organizations prefer to track their inventory based on their service agents instead of their warehouse. With this enabled, each service agent will have their own inventory of parts that you can edit. To find this feature, simply view a service agent's details page and click 'Edit...' next to the Part Inventory label. The following page will display all of your active parts and their current quantities. From there you can make any necessary adjustments.

Invoice Terms

Every organization has their own set of Terms & Conditions. This field is built for just that. Edit your terms however you please, and they will be displayed along with every invoice.

New Contact Defaults

Creating a new contact can be a repetitive task. These options aim to make creating contacts a little easier. If you find that you commonly create new contacts of a certain category or lead source, you can choose to set the default selection for either category or lead source.

Import Data Options

When service**minder** imports contacts, it tries to assign every contact a category and lead source. If either are not specified during the import process, these two fields will be determined by what's set here in the Import Data Options section.