

# General Settings

09/02/2025 8:11 am CDT

## 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 serviceminder.

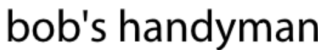
This article will review:

- [Basic Info](#)
- [Features](#)
- [Links](#)
- [Inventory Tracking](#)
- [Service Agent Settings](#)
- [Warehouse & Mailing Address](#)

## 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.

### Basic Info

Organization Name*	<input type="text" value="Bob's Handyman Austin"/>
Primary Phone*	<input type="text" value="(000) 000-0000"/>
Service Phone	<input type="text"/>
Email*	<input type="text" value="bobhandyaustin@serviceminder.com"/>
Business Number	<input type="text"/>
Country	<input type="text" value="United States"/>
Time Zone*	<input type="text" value="(UTC-06:00) Central Time (U"/>
Measure Units*	<input type="text" value="English"/>
Logo	<div><p>Drop an image on the logo to update (up to 100px by 500px in PNG, JPG, GIF format)</p></div>
Nearby Radius (miles)*	<input type="text" value="3"/>
Show IDs?	<input checked="" type="checkbox"/> Show contact, proposal, and appointment IDs on their respective details pages.

Anything with an asterisk (\*) 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 ([How do I get my EIN?](#))
- **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.
- **Nearby Radius** - Used to help serviceminder 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.
- **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 serviceminder.

### Features

Time Clock?	<input checked="" type="checkbox"/> Turn on time tracking for service agents
iCalendar Feeds?	<input type="checkbox"/> Create appointments automatically from reservation booking systems
Bids?	<input type="checkbox"/> Turns on the Subcontractor Bids feature
Subscription Hours?	<input type="checkbox"/> Turns on the Subscription Hours feature
Granularity (minutes)	<input type="text"/>
App Picture Quality	Medium ▼

- **Time Clock** - Enable the ability for employees to [Clock In & Out](#).
- **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.
- **App Picture Quality** - Set the default quality of pictures uploaded via the app (setting this lower can help with load times in the field)



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 serviceminder 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.

### Links

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Website*	<input type="text" value="serviceminder.com"/>
Facebook	<input type="text"/>
Instagram	<input type="text"/>
LinkedIn	<input type="text"/>
Thumbtack	<input type="text"/>
Twitter	<input type="text"/>
YouTube	<input type="text"/>

These links can be used in [shortcodes](#).

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## Inventory Tracking

### Inventory Tracking

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Warehouse Inventory Tracking	<input checked="" type="checkbox"/> Enable tracking inventory at the warehouse level
Service Agent Inventory Tracking	<input type="checkbox"/> Enable tracking inventory per service agent

Enable Inventory Tracking at the Warehouse and/or Service Agent level.

- **Warehouse Inventory Tracking:** Track inventory for the entire organization as a whole.
  - **Service Agent Inventory Tracking:** Track inventory for each individual service agent.
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## Service Agent Settings

### Service Agent Settings

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Hide Pricing on Tickets?	<input type="checkbox"/> If enabled, pricing will be hidden for Service Agents
Additional Start/Finish?	<input type="checkbox"/> Can additional service agents start or finish appointments?
Recent Appointments Window	<input type="text" value="1"/>

The number of days back service agents can view their completed appointments.

- **Hide Pricing on tickets?** - If enabled, pricing will be hidden for service agents.
  - **Additional Start/Finish?** - Allow additional service agents to start or finish appointments.
  - **Recent Appointments Window** - The number of days back service agents can view their completed appointments.
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## Warehouse & Mailing Address

### Warehouse Address

Q Enter a location

Address 1\* 1234 3rd St.

Address 2


Community East Cesar Chavez

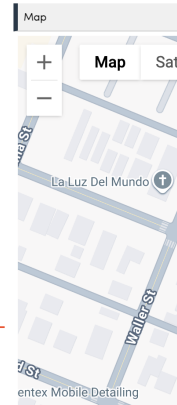
City\* Austin

County Travis County

State\* TX

Zip\* 78702

Advanced 



### Mailing Address

Address 1 1432 Example Way

Address 2

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, **ALWAYS** use the search box. The search box is the first field. It connects to Google Maps to pull in a verified address.

Q 1234 Main Street Austin

Address 1\* 1234 Main Street Austin, TX, USA

Address 2 1234 Main Street North Austin, MN, USA

Community 1234 Main Street Austin, Orchard City, CO, USA

City\* 1234 East Main Street Austin, AR, USA

County 1234 Main Street Industry, Austin, TX, USA

powered by Google



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. **ALWAYS** use the search box.

If you do not want to display your warehouse address on communications with your contacts, you can also enter a **Mailing Address**. This will be the address that displays on proposals and invoices. If left blank, it will default to the warehouse address.