# User Notifications

05/20/2025 12:18 pm CDT

## Overview

ServiceMinder offers a robust suite of email and notification options to keep your team and clients informed. Notifications can be sent to internal users, service agents, and external contacts. This guide covers how to configure internal notifications for your team. To learn more about contact notifications, click **HERE**.

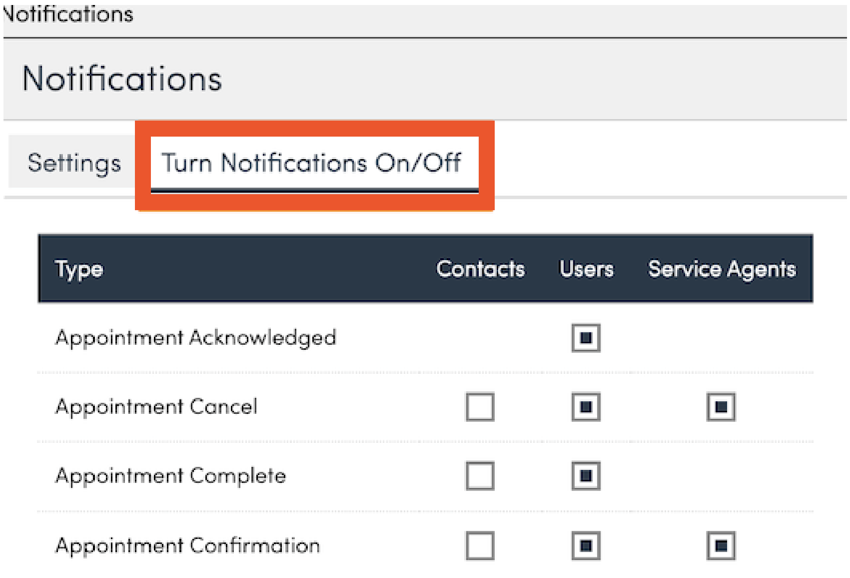
Notifications must first be enabled for the entire organization. Then they can be turned on/off for individual users based on preferences. You can also control your own personal notification preferences. These steps will be detailed below.

This article will review:

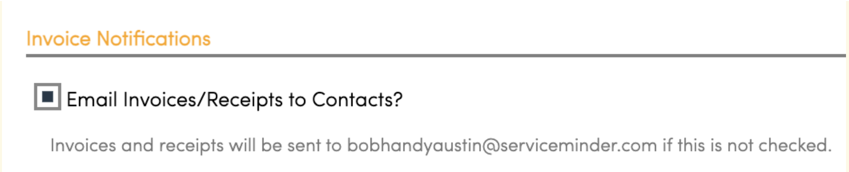


## Organization Level Notification Settings

You have the first level of Notifications in **Control Panel > Notifications.** We refer to this as the organization-level notifications. Make sure that you are on the tab titled **Turn Notifications On/Off** and note that there are three columns of check boxes: Contacts, Users, and Service Agents.




If you are done training and ready to run your business live in service**minder**, review that your master notification is turned on.
In Control Panel >Notifications> Settings Tab, check the following box:




Otherwise, your customers may not be receiving emails and you may not be receiving certain notifications.

## Notifications: Client-Facing Emails

- **Appointment Cancel** - An email informing the agent that an appointment they were scheduled to work on has been cancelled.
- **Appointment Complete** - When an appointment has been completed, sends the Appointment Complete email template.
- **Appointment Confirmation** - When creating an appointment, you can choose to send a confirmation message to the contact letting them know that the appointment is in the books.
- **Appointment Renewal** - Some services are set up to occur every so many days for a contact. When it gets close to the contact's next service date, an email is sent out reminding them to schedule their next appointment.
- **En Route** - Service agents can choose to send a notification from an appointment that lets the contact know they're on their way.
- **Invoice** - Invoices can be directly emailed to your contacts. Each email contains a link to the online version of the invoice, where the contact can pay off their balance.
- **Invoice Reminder** - Reminds a customer every 15 days that they have an open invoice. The number of days can be configured by going to Control Panel > Invoices.
- **Installment Payment Reminder** - When installment payments are set up to run this allows reminder messages to be sent to contacts.
- **Proposal** - Like invoices, proposals can be sent directly to your contacts containing a link to the online version of the proposal. The contact can then accept, select options, or apply a deposit (if applicable).
- **Proposal Confirmation** - Sends an email to the contact after the proposal is accepted, letting them know it has been confirmed.
- **Proposal Reminder** - Also like invoices, reminds a customer every 15 days until the proposal expires. This can also be configured by going to Control Panel > Proposals.
- **Proposal Update** - Lets the contact know that their proposal has been marked as accepted or has been updated since the proposal's acceptance.
- **Receipt** - An email containing a link to the contact's paid-off invoice.

## Notifications: Internal Emails

- **Appointment Acknowledged** - An email notification when an agent has clicked the acknowledge link from an appointment scheduled email.

- **Appointment Scheduled (Dispatch)** - An email notification when an appointment is scheduled via the Dispatch tool by a person with the "dispatch" user role.
- **Appointment Scheduled (User)** - An email notification when an appointment is scheduled by a person with the "user" role.
- **Appointment Finish** - When an appointment is completed and the user completing it is configured to send approvals to another user or internal notes were added to the appointment when the appointment was finished.
- **Contact Updated via API** - An email notifying a user that a contact has been updated over the API.
- **Contact's CC Updated Online** - An email notifying you that one of your contact's credit card info was updated online.
- **Entity Added** - When a new "entity" is added, like a new contact, this is an email notification with "You've got a new XYZ".
- **Weekly Summary** - Like the Daily Summary, this informs you of upcoming events for the week.
- **Bounce Notification** - This email alerts you when an email that you've sent out was unable to reach its destination.
- **Contact Assigned** - An email notifying a user that a contact has been assigned to them.
- **Daily Summary** - An email containing a list of things to do for the day such as tasks or appointments.
- **Drip Notification** - Certain drip actions can be set to email you when something has happened.
- **Entity Added** - When something is created in serviceminder via our API, you can choose to be notified about it.
- **Proposal Accepted** - An email notifying a user that one of their customers has accepted a proposal.
- **Proposal Declined** - An email notifying a user that one of their customers has declined a proposal.
- **Proposal Walkthrough Completed** - This email allows users to be notified when a proposal walk-through ad hoc template is completed via appointment.
- **Upcoming Appointment Reminder -** An email reminding a user of an upcoming appointment.
- **Upcoming Task Reminder -** An email reminding a user of a task that is due soon.

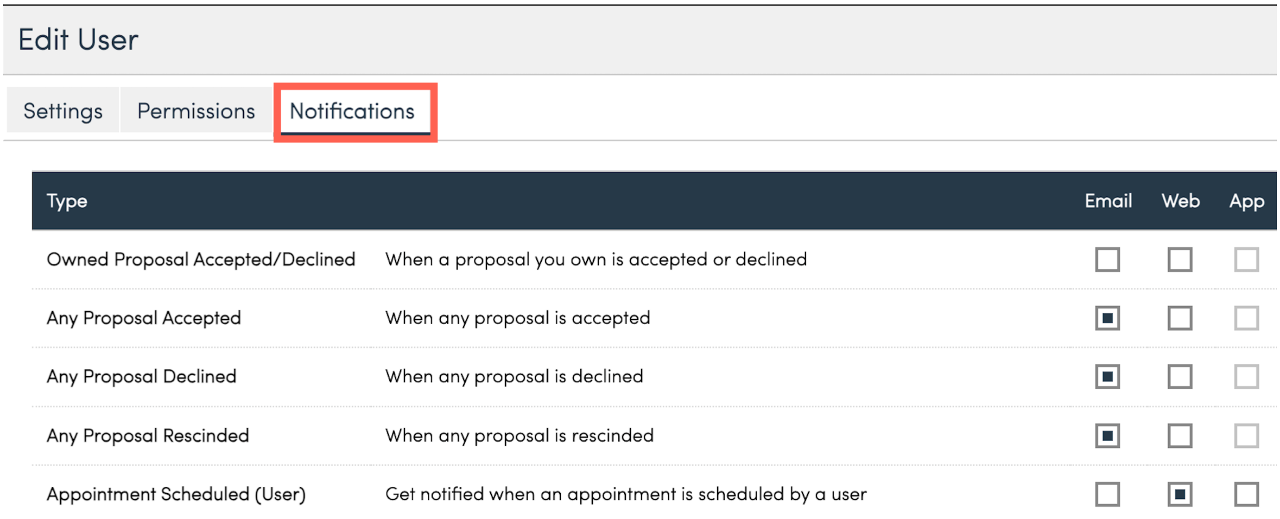
## Notifications: Internal *and* Client-Facing Emails

- **Installment Payment Success** - An email notification that is sent when an installment payment runs and is approved. The connected user and/or contact's notification must also be turned on.
- **Invoice Receipt** - An emailed invoice receipt.
- **Invoice Reminder** - An emailed invoice reminder.

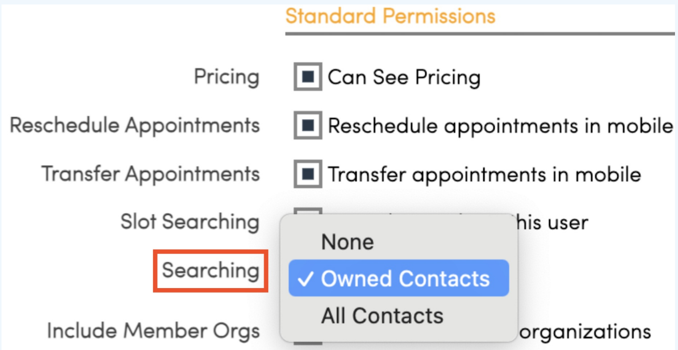
# User Notifications Settings

Once you complete the steps on the Settings and Permissions tabs, go to **Notifications** tab. You can edit a specific user to receive email notifications, web notifications (an orange banner across the top of the web page), and/or in-app notifications.

For a user to receive these notifications, they must be enabled on the Turn Notifications On/Off in Control Panel > Notifications ***and*** on the User Permissions tab in Control Panel > Users > Edit User.




Notifications will be impacted by [Contact Ownership](). If you have this feature enabled in your organization, and the user's **Searching** scope is set to **Owned Contacts**, they will only receive notifications for contacts they own.




### Here is a full list of the available notifications for individual users:

- **Owned Proposal Accepted/Declined** - When a proposal you own is accepted or declined
- **Any Proposal Accepted** - When any proposal is accepted
- **Any Proposal Declined** - When any proposal is declined
- **Any Proposal Rescinded** - When any proposal is rescinded

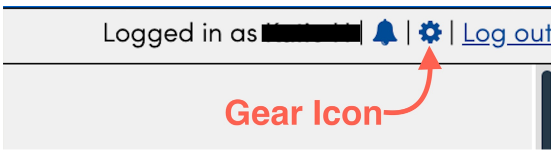
- **Appointment Scheduled (User)** - Get notified when an appointment is scheduled by a user
- **Appointment Scheduled (Dispatch)** - Get notified when an appointment is scheduled in Dispatch
- **Appointment Acknowledged** - Get notified when a service agent acknowledges an appointment
- **Appointment Canceled** - When an appointment is canceled
- **Appointment Completed** - When an appointment is finished
- **Appointment Finish Note** - When an internal note is added while finishing
- **Appointment Re-queued** - When an appointment is added back to the queue by a service agent
- **Successful Installment Payments** - When an installment payment is charged successfully
- **Failed Installment Payments -** When an installment payment fails
- **Contact Updated Card on File** - When a contact updates their card on file online
- **Payment Received** - When a client pays an invoice or deposit
- **Tip Received** - When a tip is received on an appointment you are assigned to
- **New Contacts/Appts via API** - When new contacts and appointments are added via our API
- **Contact Updated via API** - When contacts are updated via our API
- **Call to Action Response** - When a contact responds to a Call to Action; separate from Email Campaigns, a Call to Action is a short form you can create and link in emails and track the clicks/responses
- **Email Bounced** - When an email you sent couldn't be delivered
- **Spam Report** - When an email you sent was reported as spam by the contact
- **Incoming Call** - When there's an incoming call
- **Part Reorder Request** - When a part's quantity on hand gets too low and needs to be restocked
- **Contact Requesting Service** - When a contact schedules an appointment through the online scheduling portal
- **Contact Assigned** - When a contact is assigned to you
- **Task Assigned** - When you're assigned a task
- **Bid Requested** - When you (as a subcontractor) are sent a bid request; the average user will not need this notification
- **Route Completed** - When a route has finished calculating
- **Goes on Callback Queue** - When a contact goes on a callback queue, which is like a call center sequence; these are sequences set up in the backend of SM by specific request, so your brand may not have or need this notification

- **Finishes Callback Queue** - (similar to above) When a contact finishes a callback queue; because these are set up by the SM team by request, the average user will not need this notification turned on
- **Ad Hoc Form Completed** - When a contact completes an ad hoc form
- **AirAdvice Report Added** - (requires an integration with AirAdvice) Receive notification when a new report is added to AirAdvice; AirAdvice is a third-party app that tests air quality so many businesses will not need this notification turned on
- **Bid Note Added** - When a subcontractor leaves a note on a bid
- **Bid Agreed to or Declined** - When a subcontractor agrees to or declines a bid
- **Checklist Assigned -** When a checklist has been assigned to your user
- **Feedback Received** - (Requires Feedback & Issue Management Add-On) When feedback is left on an appointment
- **Issue Assigned -** When an issue has been assigned to your user

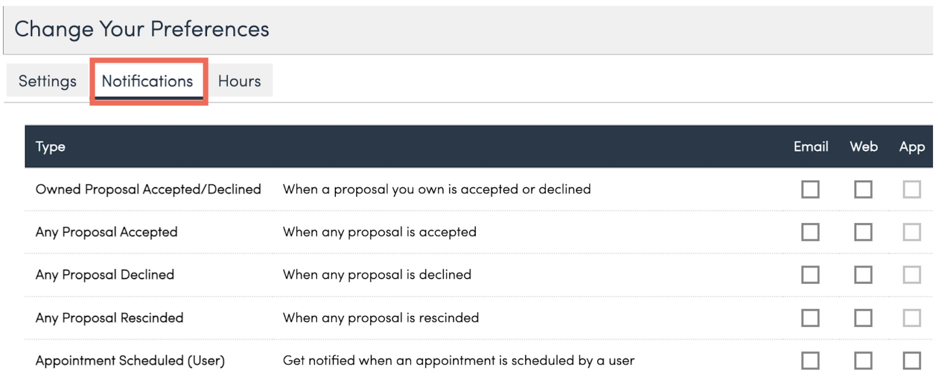
## Personal Notification Settings

There is an additional settings list for individual users to set what they receive notifications for.

When logged in, you should see a gear icon next to your name in the upper right corner of the screen.




When you click on the icon, you have options for your personal settings and notifications.




## FAQs

### Why can't I see all the notifications and permissions options?

You may not have the level of user permission needed to access these settings. Contact the Owner, Brand Administrator, or someone from your brand's operation team to discuss your user permissions.

### As a User, if I click on a link in an email that I am bcc'd on, does that then as show open/clicked in the system?

Yes. If the link that is sent to the customer is also clicked by any other User, that audit should show in the audit trail for the Appointment, Proposal, Invoice, etc.

Additionally there should be a "Where" or "Who" column to give more answers to that audit. Who is typically a user making an action within service**minder**, and empty Where fields mean that they are applied to that same User until a change in person/location.

### I have a user that isn’t receiving notifications, but I’ve checked all the permissions/settings and they should be.

Be sure to check that they haven’t turned anything off in their personal notifications list. This is found for each user by clicking on the gear icon (when they are logged in). This will appear in the upper right of the screen next to their name.

### One org is receiving accepted proposals from another org but they are two different serviceminder profiles/accounts.

Most likely this is being caused because a User is set up to receive notifications, so they'll receive it from any orgs they're a user in. You will need to go to Control Panel > User > Edit > then go to the third tab "Notifications. If they have "Any Proposal Accepted" or "Any Proposal Declined" then that applies to any organization they are a member of - even if they are different accounts within SM.

### Does the check box under Contacts for Appointment Confirmation need to be checked for ANY notification to be sent or only automated ones?

Yes, this needs to be checked for any automated emails that are not A.) manually sent; B.) sent via drip triggers or campaigns. That includes appointment confirmation and appointment reminders.

### Does the Appointment Confirmation option only send the confirmations? Will nothing be sent because the original confirmation was not automatically sent/this setting is not enabled for contacts?

It will not send reminders as the confirmation/reminder settings on those appointments haven't been triggered; the initial send is necessary for us to know "this is an appointment we want to confirm and send reminders on." Without sending the confirmation at some point, our system can't see that. If you don't have the Appointment Confirmation checkbox enabled for contacts, then that email + reminders will not go out, unless manually send (via ad hoc emails.)

So Appointment Confirmations = confirmations & reminders.