User Notifications

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Overview

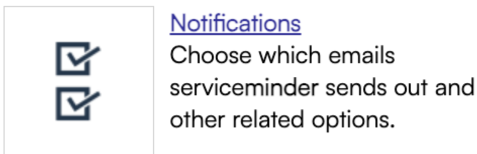
ServiceMinder offers a robust suite of email and notification options to keep your team and clients informed. Notifications can be sent to internal users, service agents, and external contacts. This guide covers how to configure internal notifications for your team. To learn more about contact notifications,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

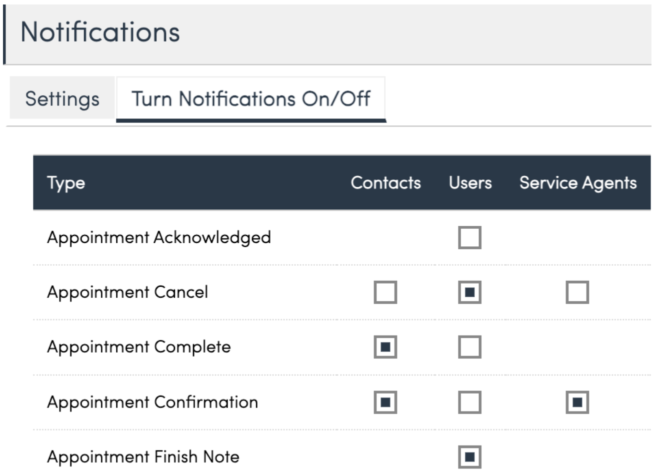
You have the first level of Notifications in **Control Panel > Notifications.**



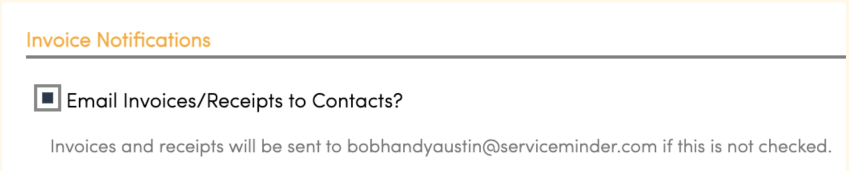
We refer to this as the organization-level notifications. Make sure that you are on the tab titled **Turn Notifications On/Off.**

This page allows you to toggle notification types for three roles:

- **Contacts** (your customers)
- **Users** (internal team members)
- **Service Agents** (team members assigned to appointments)



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.

Client-Facing Emails (Contacts)

Notification Type	Description
Appointment Confirmation	Confirms a newly created appointment.
Appointment Cancel	Notifies contact when an appointment is cancelled.
Appointment Complete	Sent when an appointment is marked complete.
Appointment Renewal	Reminds clients to reschedule recurring services.
En Route	Let clients know a tech is on the way.
Invoice	Delivers invoice with payment link.
Invoice Reminder	Sent every X days (configurable).
Installment Payment Reminder	Reminder for upcoming installment payments.
Proposal	Sends a proposal with a link for review and approval.
Proposal Confirmation	Confirms a proposal was accepted.
Proposal Reminder	Sent until the proposal expires (every X days).
Proposal Update	Informs contact of changes to an accepted proposal.
Receipt	Includes a link to a paid invoice.

Internal Emails (Users & Agents)

Notification Type	Description
Appointment Acknowledged	When an agent acknowledges an appointment.
Appointment Scheduled (Dispatch/User)	Sent when appointments are booked by dispatchers or users.
Appointment Finish	Notifies assigned user when internal notes or approvals are added.
Contact Updated via API	Triggered by an API contact update.
Contact's CC Updated Online	Alerts when a card is updated online.
Entity Added	Notification for new contacts, tasks, etc.
Weekly/Daily Summary	A summary of scheduled activities.
Bounce Notification	Email failed to deliver.
Contact Assigned	Notifies user of new contact ownership.
Drip Notification	Sent based on drip campaign triggers.
Proposal Accepted/Declined	Customer's response to a proposal.
Proposal Walkthrough Completed	When an ad hoc form is completed during a proposal.
Upcoming Appointment/Task Reminder	Reminder for scheduled items.

Dual Notifications (User and Contact)

Notification Type	Description
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.

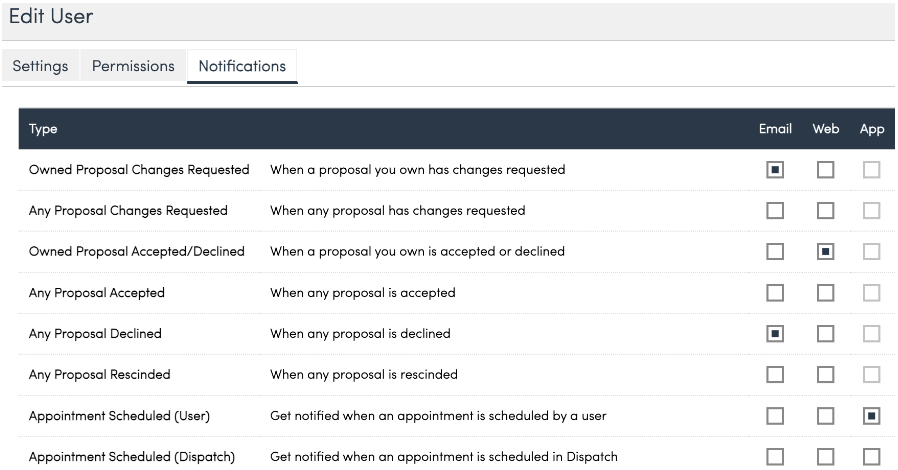
User Notifications Settings

Once you complete the steps on the Settings and Permissions tabs, go to **Notifications** tab.

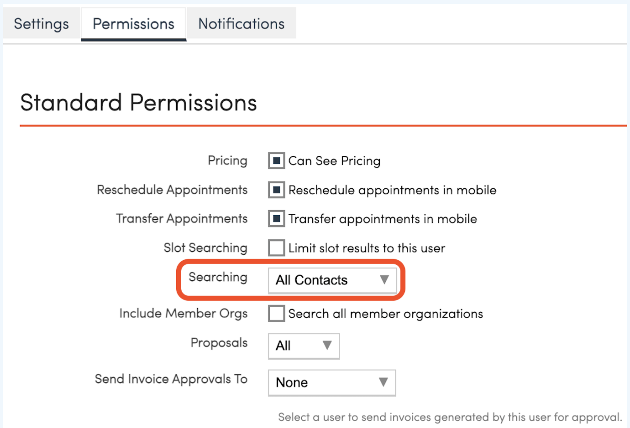
Users can receive:

- **Email Notifications**
- **Web Notifications** (orange banner)
- **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:

Notification Type	Description
Owned Proposal Changes Requested	When a proposal you own has changes requested
Any Proposal Changes Requested	When any proposal has changes requested
Owned Proposal Accepted/Declined	When a proposal you own is accepted or declined
Any Proposal Accepted	When any proposal is accepted
Proposal Declined	When any proposal is declined
Any Proposal Rescinded	When any proposal is rescinded

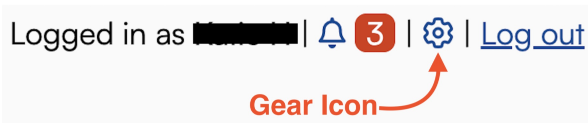
Notification Type	Description
Appointment Scheduled (User)	When an appointment is scheduled by a user
Appointment Scheduled (Dispatch)	When an appointment is scheduled via Dispatch
Appointment Acknowledged	When a service agent acknowledges an appointment
Appointment Canceled	When an appointment is canceled
Appointment Completed	When an appointment is marked complete
Appointment Finish Note	When an internal note is added while finishing the appointment
Appointment Re-queued	When an appointment is re-added to the queue by a service agent
Appointment Reminders	Get reminders for your upcoming appointments
Task Reminders	Get reminders for your upcoming tasks
Installment Payment Success	When an installment payment is processed 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 makes a payment toward an invoice or deposit
Tip Received	When a tip is received on an appointment you're assigned to
New Contacts/Appts via API	When new contacts or appointments are created via API
Contact Updated via API	When a contact is updated via API
Call to Action Response	When a contact submits a Call to Action form
Email Bounced	When an email you sent was not delivered
Spam Report	When an email you sent was reported as spam
Incoming Call	When there's an incoming call
New Text Message	When you receive a new inbound text message
Part Reorder Request	When a part's inventory reaches its reorder threshold
Contact Requesting Service	When a contact schedules a service via the online portal
Contact Assigned	When a contact is assigned to you
Task Assigned	When you're assigned a task
Bid Requested	When you're sent a bid request (typically for subcontractors)
Route Completed	When a route has finished calculating
Route Builder Completed	Alternate name for Route Completed
Goes on Callback Queue	When a contact enters a callback queue
Finishes Callback Queue	When a contact finishes a callback queue
Ad Hoc Form Completed	When a contact completes an ad hoc form
AirAdvice Report Added	When a new report is added to AirAdvice (integration required)
Bid Note Added	When a subcontractor adds a note on a bid

Notification Type	Description
Bid Agreed to or Declined	When a subcontractor agrees to or declines a bid
Checklist Assigned	When a checklist is assigned to your user
Feedback Received	When feedback is submitted on an appointment (requires add-on)
Issue Assigned	When an issue is assigned to your user

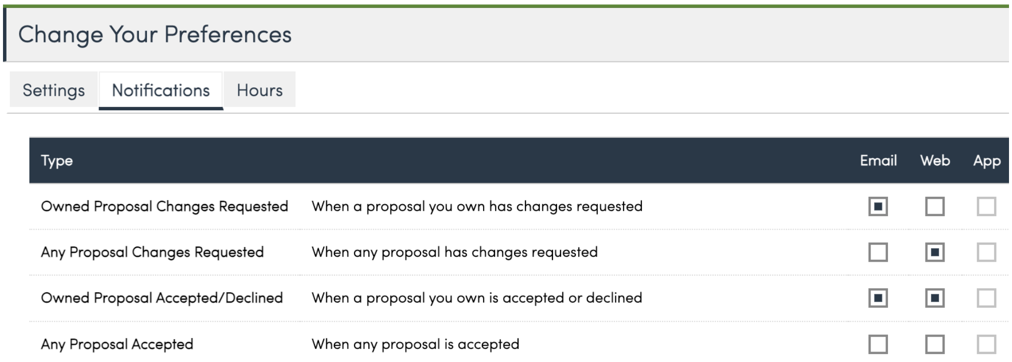
Personal Notification Settings

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

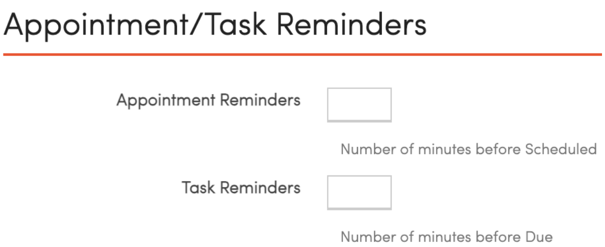
When logged in, you should see a gear icon next to your name in the upper right corner of the screen.



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



If you have notifications for **Appointment Reminders** or **Task Reminders** enabled, you can also control how many minutes before a task or appointment you receive a reminder notification under the **Settings** tab.



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.