App Navigation

05/28/2026 3:26 pm CDT

Overview

The mobile app was initially designed for agents, in the field, to be able to start, work and finish appointments. Over the years, we've added more "owner in the field" capabilities and access so business owners can "run their business" on the road, while they spend the day out on sales appointments, installations, work crew management or other things. With that in mind, each user will have unique permissions, so some of the navigation below will not apply to all users.

Video Walkthrough

Your browser does not support HTML5 video.

Navigation

- ### Update App
  - When **Update App** shows up, that means there's "new stuff" available for the app. Tapping this item delivers the page where one can install the patch (the app will restart when the download is complete).
- ### My Schedule
  - This takes the user to their schedule. Only that user's appointments and tasks (or queued appointments) shows up on this page.
  - Under "My Schedule," depending on the day's appointments, is "Load Out." The top section shows the counts by appointment (service) type. The bottom section shows the sum of all the individual part/add-ons.
- ### Recent
  - Depending on settings/permissions, this lets users see appointments they've recently completed.
- ### Schedule
  - If one has access to the full calendar, the Schedule item opens a page that lists all of the scheduled appointments grouped by service agent. For example, if a user has permissions, and wants to know what a specific agent has coming on on their schedule, this would the place to go.
- ### Calendar
  - This is similar to the month calendar from the web. Tap on specific days to see the appointments for that day. All of the color coding from appointments (services) will show up as dots on the calendar for each appointment.
- ### At a Glance

- At a Glance is similar to the At A Glance page from the web -- it shows recent contacts, appointments and invoices. It is also a handy page for finding any upcoming appointments that were marked as **First Available**.

- ## TaskBoards
  - If the user has permissions to see one or several TaskBoards, those are accessible at this tab. A user with proper permissions can change a contact's status on a TaskBoard, and may also remove a contact from a TaskBoard.
- ## Texting
  - The counter shows how many unread messages the user has. Tapping the item takes one to the app's texting hub.
- ## Notifications
  - The counter shows the user's unread notifications . Tap to view and read them. This list is synchronized with the web.
- ## Clock In/Out
  - If time-tracking is enabled for the organization, this is one way a user may clock in and out.
- ## Snapshots
  - Similar to the web, Snapshots show counts and open up their respective lists.
- ## Projects
  - Shows current projects (with proper permissions)
- ## Accepted Proposals
  - Shows how many and lists accepted proposals.
- ## Open Proposals
  - Shows how many and lists open proposals.
- ## Open Invoices
  - Shows how many and lists open invoices.
- ## Administration
  - If the user has administration permissions, related menu items are here.
  - ### Pulse
    - This takes the user to the Pulse dashboard. It shows most of the same information visible on the web version.

- **Dashboard**
    - If you are a brand administrator, you can use Dashboard to impersonate users in the app.
- **Organizations**
    - If your user belongs to multiple organizations, you can select from this list to switch to that organization.

FAQs

What if I don't see all these things on my app?

It's all about roles and permissions. Check with your organization admin to make sure you're seeing everything you should.

What if I don't "update" when I see that button?

You'll miss out on new functionality, so make sure to update when prompted!

Troubleshooting

If you get "stuck" - there's a trap door!

Can't upload, having the app "spin?"... just click the "hamburger menu" (three horizontal bars at top right). Click "send diagnostics" and then in the "Got a Question" section, please tell us your username, the issue you're having , and that you sent diagnostics. This goes straight to our developer team and they can research the problem!
