Appointments on the Mobile App

11/10/2025 3:39 pm CST

Overview

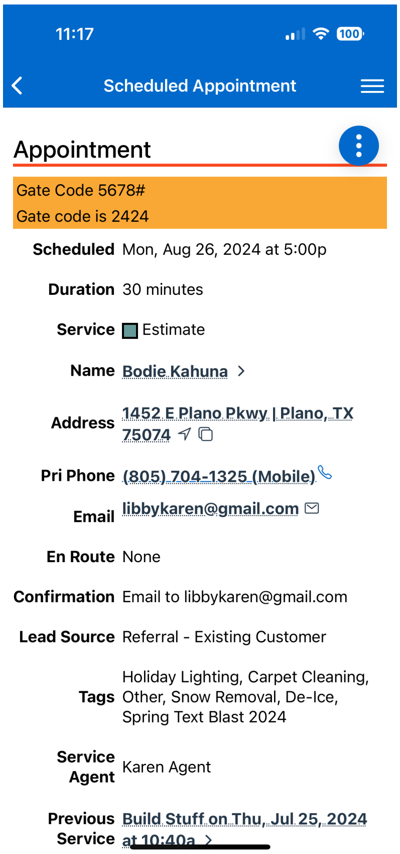
Depending on the organization's workflow/processes, and what type of appointment is scheduled (i.e. Sales vs. Service,) running an appointment on the mobile app can vary greatly. In this section, we're going to explain the "basics" of appointments. What an agent sees on an appointment screen will depend on custom fields, picture requirements, payment settings and more. So, your brand administrator can provide more insight into exactly what your process will be.

This article will review:

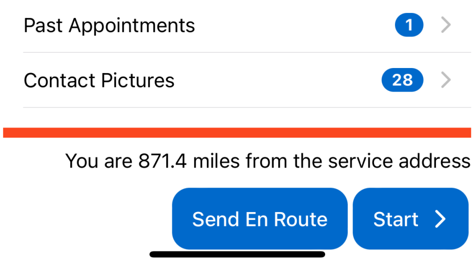
Settings and Navigation

GettingThere

In "**My Schedule,**" tapping on any appointment listed will take the user to the details. Tapping on the address will launch turn- by- turn directions on your phone (Based on your navigation app selection in the mobile app Settings.)

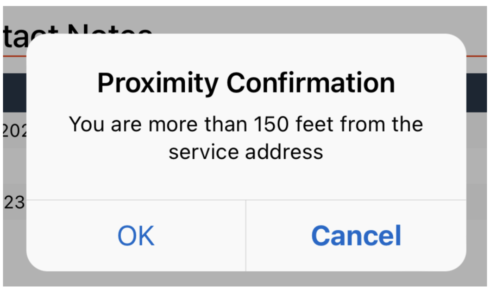


If your organization has enable **En Route notifications**, you'll see that button on your app. When you are truly "on the way," tap that button and the customer will be sent a notification (by text or email, depending on their preferences) that the agent is on the way, with an approximate arrival time based on your navigation app.



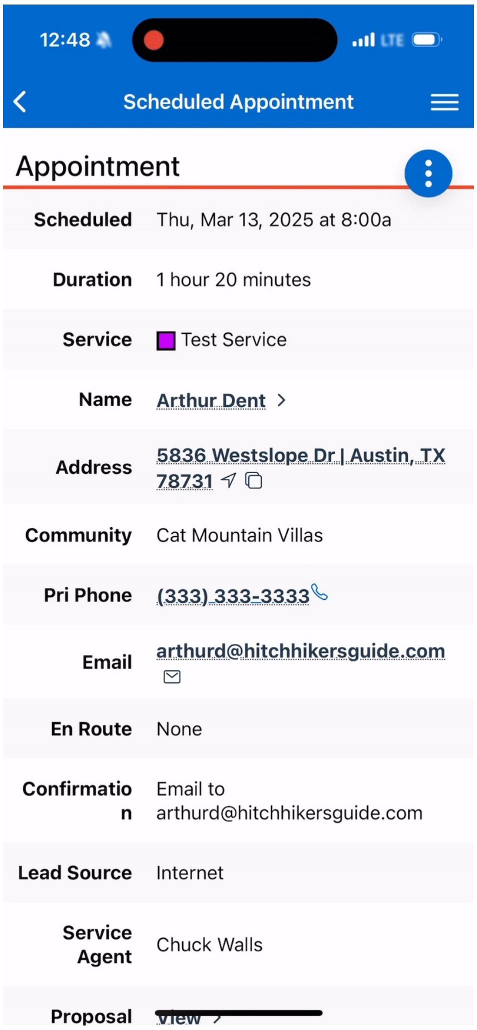
Once you arrive at the destination, tap on the **Start** button.

If your organization has starting "proximity" configured, when you hit the **Start** button, you may get a prompt if your current location is outside that radius. Confirm you're at the right location, then tap "OK" and the appointment will be started.



Appointment Action Menu

The vertical "three dot" icon on any appointment details page (top right) gives you additional actions you can perform while running an appointment.



Working a Service Appointment

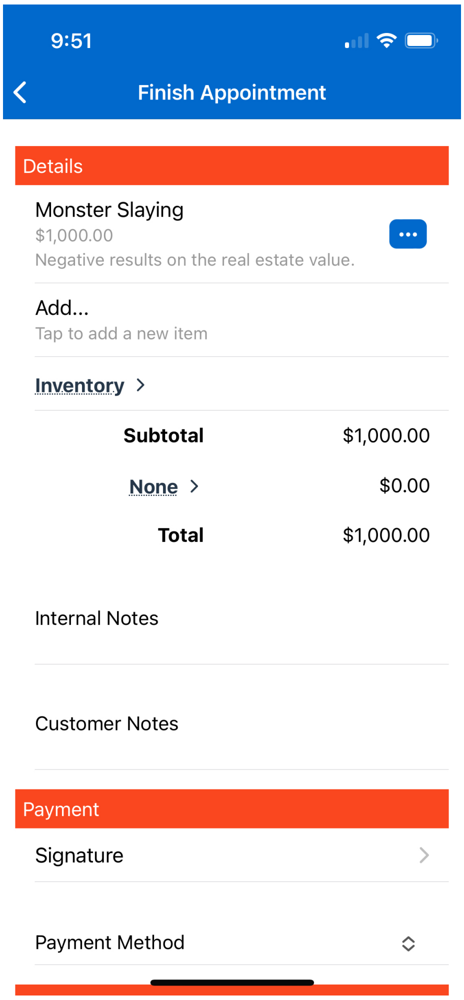
> This flow will vary quite a bit depending on custom fields, picture requirements, whether users can see pricing or what the finish action is for the service (generating an invoice, closing the appointment or creating a proposal). All of the possible paths end up with an option to return to **My Schedule** to grab your next appointment.

If the appointment requires initial custom fields or pictures (see FAQs for photo limits), you'll start on a page to complete these fields and take photos. Tap **Save**, then **Continue** to return to the appointment start page. Once all required fields and photos are complete, tap **Continue** to access the details page.

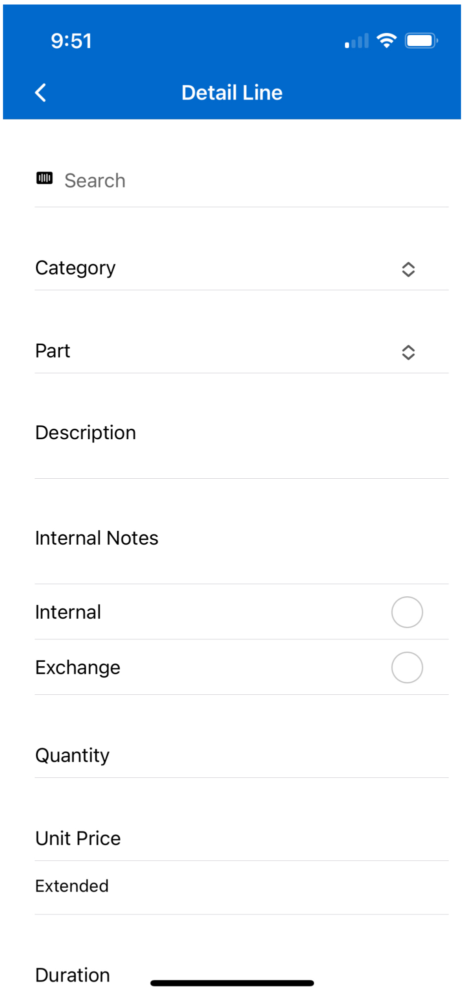
Technicians may need to add parts (e.g., chlorine tablets, fertilizer) or fill in custom fields during the appointment. Requirements vary by organization.

In the screenshot below, you will note the three dots button next to the Service line. In this example, it is "Monster Slaying". You can use that button to add an additional service or change it entirely.

The **Add** option below the service line allows you to edit the Parts listed on the appointment.



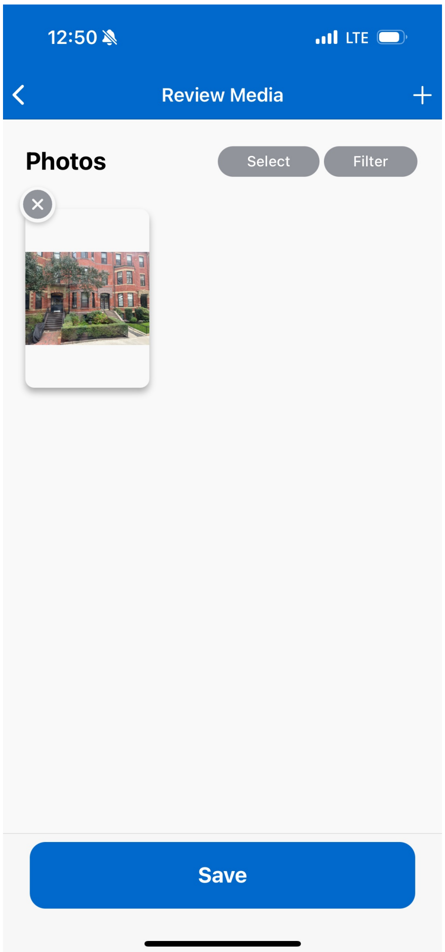
If you choose to add a part, this is the screen that you will see. You can search all parts at the top or filter by category or find a full list of parts in the **Part** dropdown.



At the end of the appointment (during the "Finish Phase"), additional photos may be required. Follow the same steps as before.

Tap **Finish** to finalize the appointment, enter post-appointment details, and make any necessary invoice adjustments. You will then be directed to a page where you can review any media you have added to this appointment.

If you have uploaded media, it will look like this:	If you have not uploaded media, it will look like this:

<table>
<tr>
<td>
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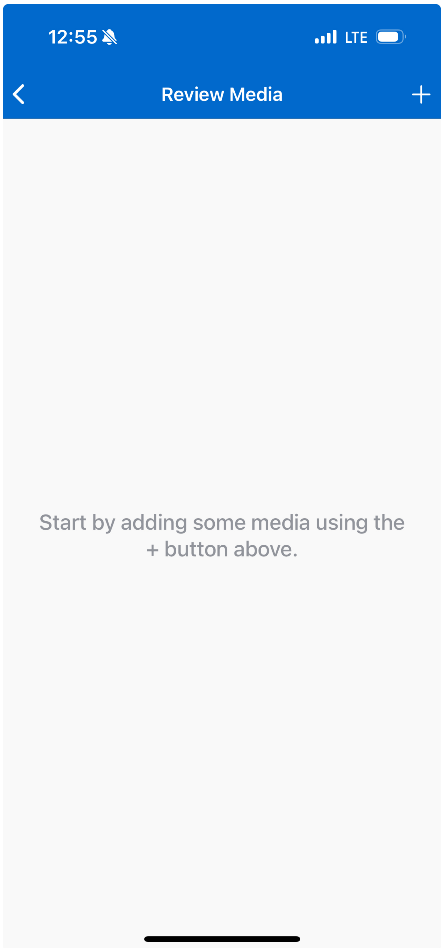
<td>
</td>
</tr>
<tr>
<td>Here you can remove or add any photos you have taken so far.

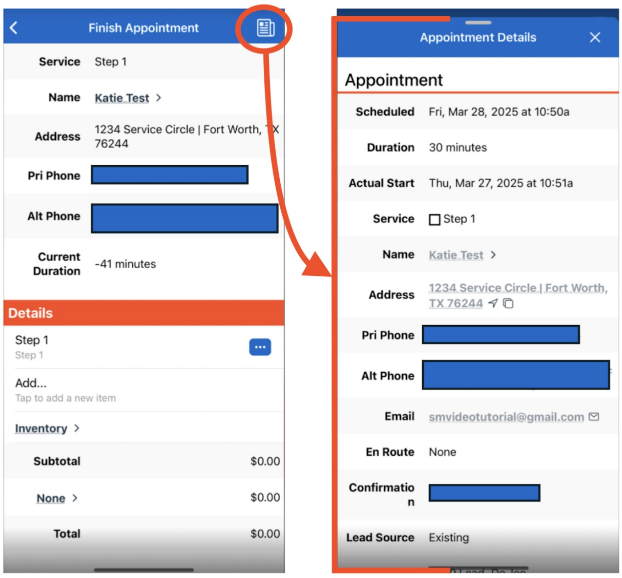
Click on a photo to add notes or tags.

Once you are happy with the photos on this screen, you can click Save. You will be returned to the appointment.</td>
<td>From here, you can:
A. Add photos and click Save.
or
B. Click the back arrow to return to the appointment.</td>
</tr>
</table>

After you have finished reviewing media, click **Finish** again.

On the Finish page of the appointment, you'll notice an icon at the top of the screen. Click this to open a read-only

Quick View of the appointment details. This allows you to refer back to important information without interrupting your workflow.



In most instances after finishing the appointment, you will be directed to the invoice page, depending on the service settings. On this page you can review the invoice details, accept payment, and choose to send a copy to the contact information on file (unless the generated invoice is unapproved). You may also see another En Route button, which will send an en route notification to your next appointment.

Click **Submit** to close out the appointment.

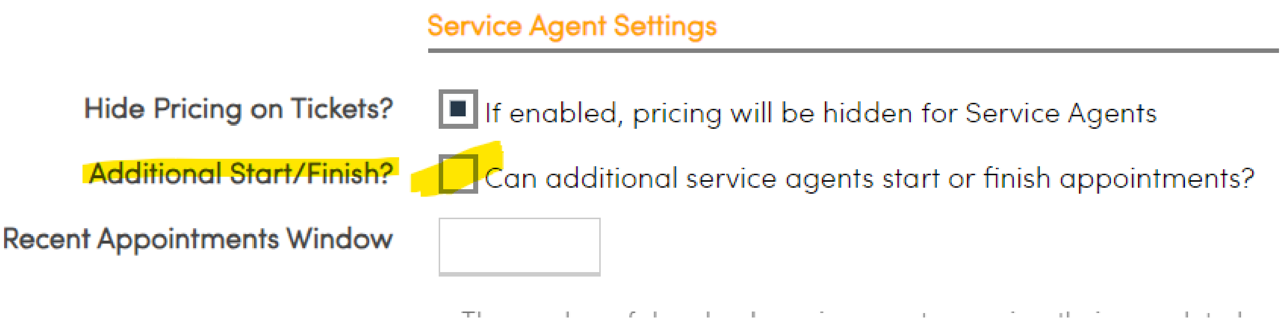
> **Uploading Photos:** Often, your photos will upload immediately upon completing an appointment. In cases where cell service is limited or there is an extremely large quantity of photos to upload, the photos will continue to upload in the background while you continue your schedule for the day. You can finish and submit the appointment and move on to the rest of your schedule knowing that the images will continue to upload as long as your device has service to do so.

Working as a Team

When multiple agents are scheduled for a job, there's always a **lead** agent. *Typically*, that's the agent who will "start" and "finish" the appointment.

Additional agents (already assigned to the appointment) can "join" and "leave" an appointment without a hitch.

If the lead agent isn't around to start of finish the appointment, any other assigned member of the team can handle those functions, as long as the **Additional Start/Finish** box is checked in **Control Panel > General > Service Agent Settings**.



Carry-Over

In both the mobile app and the web version of service**minder** you can "carry over" an appointment when the last scheduled day's work on the job is not going to be completed. This process allows you to both finish out the current appointment and schedule another appointment.

On a "started" appointment you will see a button called "Carry Over". This button initiates the process of closing out that current appointment and taking you to the schedule page to schedule another appointment (as long as the user has permission to schedule/reschedule)

Click here for a 5-min video on Carry-Over

Working a Sales Appointment

Most services involving "the sale" are called estimate, consultation, sales call, quote. In most cases, the "finish action" for that service is "Create Proposal."

Proposal is what, in service**minder,** we call a work order/quote/estimate. Also, typically, an "Estimate"-type service is set as a $0.00 service.

The point of the sales appointment is to gather the information needed for the actual service, whether it's remodeling, putting up a fence, spraying for pests, etc. (Just a reminder that the service**minder** platform is used by dozens and dozens of different types of service businesses.) Your brand will have set-up an appointment workflow for your particular service, quite often taking photos, getting measurements, asking questions of the prospect. So, once you hit "Start" on the appointment, these custom fields will be ready for you to fill in, select from a drop-down, plug into a grid, etc. You may be prompted before, during or at the sales appointment finish to take photos. Just as with a service appointment, these photos will upload at the Finish stage.

Sales appointments are typically fairly easy to manage on the mobile app. We all know that technology doesn't replace a skilled salesperson. The Mobile App is there to capture the information you need to create your proposal. Once you have gathered all needed details, click "Finish" and, in most cases, you'll be taken to a new/blank proposal screen.

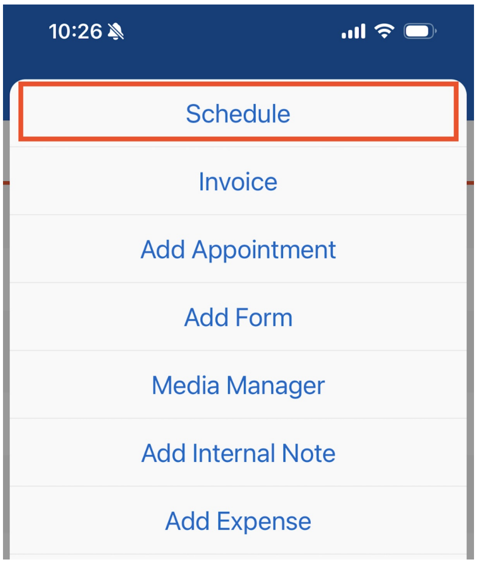
Here, you'll select the service that you are selling. Your service may have a template set-up or you may need to create the proposal from scratch.

In the mobile app, and agent has the ability to add parts (line items) and use the custom field information to enter proper quantities. Just as on the web, the agent can create Options for the prospective customer, as well as create proposal Bundles and add photos.

When the proposal is complete, it can be saved and sent to the prospect for acceptance. They will receive a link, and can Accept/Decline/Request Changes (if your organization has Feedback+Issues) and even pay a deposit!

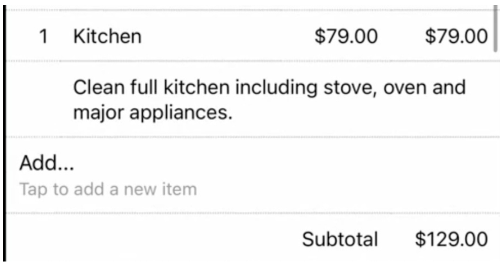
Scheduling an Appointment from a Proposal

Once the proposal has been accepted, you can click the three dots in the top right corner and select **Schedule.**



On the next page, you will be able to review the contact information as well as the service and parts included from the proposal.

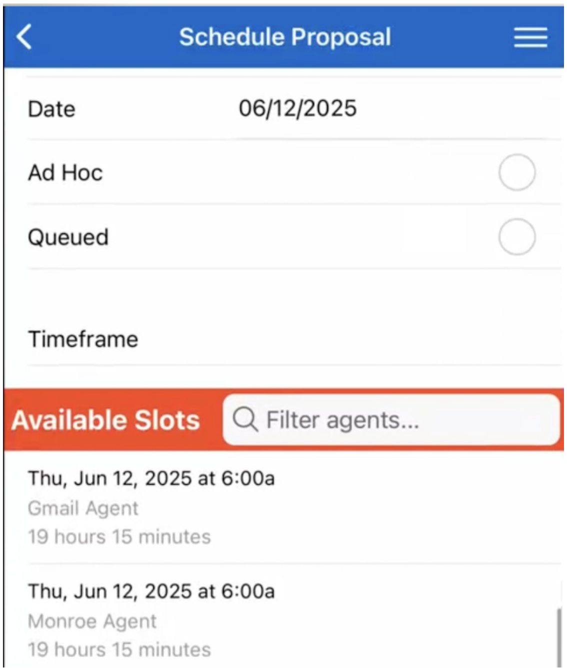
Click **Add** to add new parts (line items) to the appointment.



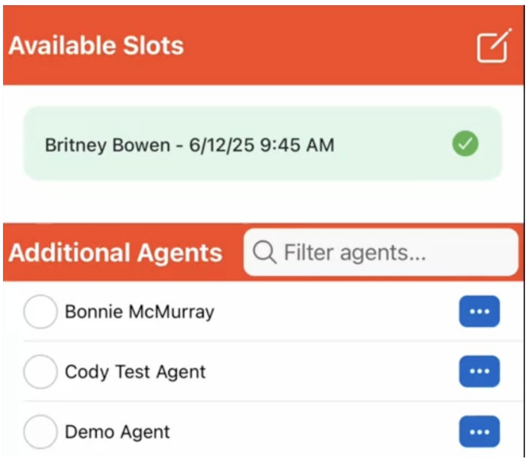
Select a Date and Timeframe for the appointment.

Select whether or not the appointment will be: **Ad Hoc** (scheduled manually, disregarding system scheduling settings) or **Queued** (penciled in for a date, knowing you need to come back later and schedule it for a time with a service agent).

Select any agent from the list of **Available Slots.** Filter by Service Agent using the search box in the orange bar.

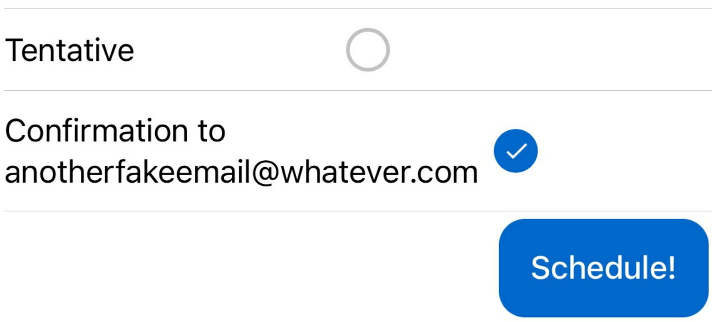


Optionally, choose any additional agents that need to be on the appointment. This option is only available when scheduling in Normal mode.



Select whether or not you want to schedule the appointment as **Tentative**.

Choose to send a confirmation email or text (if two-way-texting is enabled.

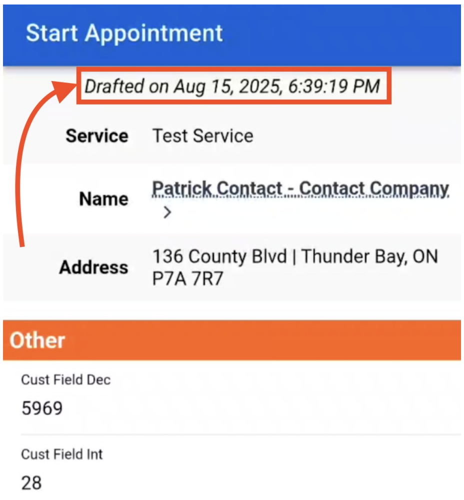


Click **Schedule!**

Saving Progress as a Draft

When running an appointment in the mobile app, your progress is automatically saved as a **draft,** including entered notes, uploaded photos, and other details.

If you exit the appointment before submitting, the draft will be **automatically applied** the next time you open it. You'll see a banner at the top indicating when the draft was saved (e.g., "Drafted on 9/2 at 10:30 AM").



Drafts allow you to pause and resume without losing work. They remain under **In Progress** until submitted, at which point the draft is cleared. This ensures you can confidently step away from an appointment and pick up right where you left off.

Using the "Later" Button

The **"Later"** button appears on the **appointment page** in the mobile app and allows you to **save your progress** if there's an issue submitting a completed appointment. You won't see the **Later** button under normal circumstances. It only appears **when an error occurs while submitting an appointment**, such as:

- Weak or lost internet connection
- Timeout or API failure
- Upload error (for photos or signatures)
- Temporary server issue

When this happens, you'll see the **Later** button appear next to **Submit**.

Tapping **Later** allows you to:

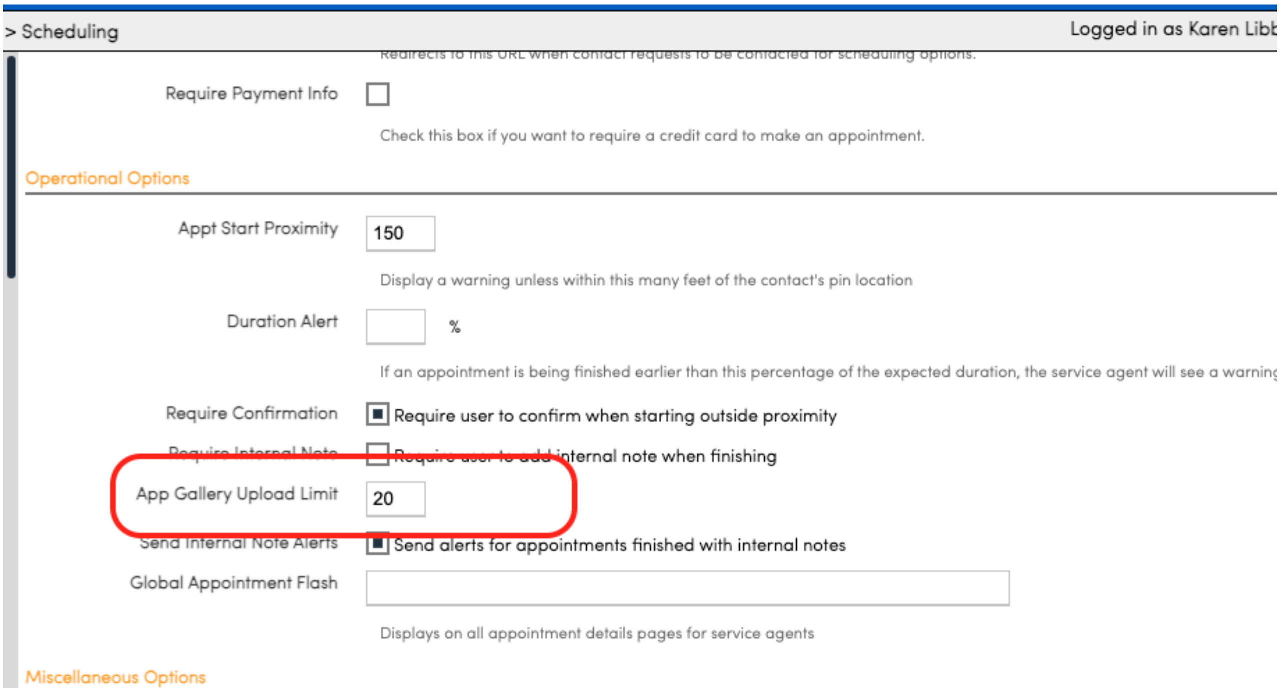
1. **Save your progress** on the appointment, including any notes, photos, and updates you've entered.
2. **Return to your My Schedule page**, where you'll see a **Resume prompt** at the top of the screen for the affected appointment.
3. **Finish and resubmit the appointment later**, once your network connection or the upload issue has been resolved.

This ensures you don't have to redo any work if a submission fails.

FAQs

Why is there a limit on the number of photos I can upload?

This is a setting! If this setting in **Control Panel>Scheduling** is not "filled in", then the default limit is 5 photos per appointment. Scroll down to the **Operational Options** section to add a photo limit.



Why won't the app let me finish an appointment?

Many organizations have required custom fields, which must be taken care of, so no information is left out. Make sure you've attended to all custom fields, and then the finish button should no longer be "grayed" out.

Why can't I see other agents' appointments?

Most mobile app users have only the permission to see their own appointments. If you are an agent with more than one organization, you can see ALL of your service**minder** appointments for all organizations on the Mobile App.

Is there a user permission to get rid of the payment section on the app?

You can turn off "Can See Pricing" for the User. That is located in **Control Panel >** edit **User > Permissions** tab.

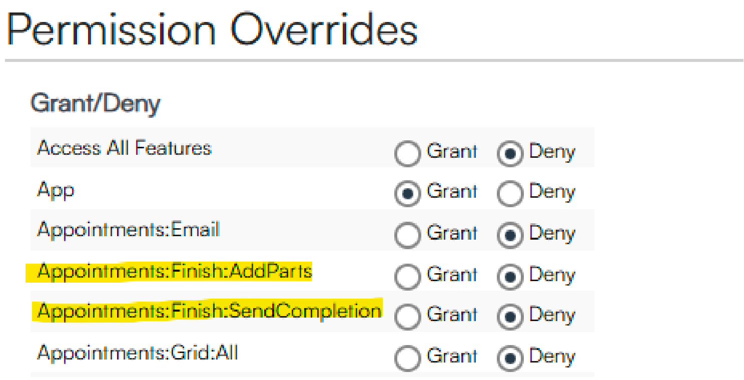
To learn more, go to User Permissions.

In the finish phase of the mobile app, is it possible to not see the Details area in the complete area?

What you could do here is set the Finish Action on the service to be "Close Appointment" and it should skip that Finish Appointment page.

Outside of that, you can remove the user's access to those portions via permissions.But with the Finish Action as

"Default Action" those portions will still show.



I'm supposed to have certain fields pre-filled out for me in appointments such as building entry information, but they are showing as blank.

These fields are Appointment Custom Fields. When creating them, there is an option to **Copy from Previous**. So if it was filled out once for an appointment, you can carry over that info to the next one. It helps limit how much repeatable information the technician has to fill out. You may be able to make this change or you may need to ask your Brand Admin to do so on your behalf - it would depend on if that capability is "locked down" at the brand level to keep things standardized.