# **Appointments on the Mobile App**

07/11/2025 8:51 am CDT

### **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.

# **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.

Past Appointments	1 >
Contact Pictures	28 >
You are 871.4 miles from the se	rvice address
Send En Route	Start >

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.

tar	+ Notoo		
	Proximity C	onfirmation	
202	You are more than service	150 feet from the address	
23	ОК	Cancel	

### **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.

12:48	ail the 📼
< Sc	cheduled Appointment
Appointme	ent 🚺
Scheduled	Thu, Mar 13, 2025 at 8:00a
Duration	1 hour 20 minutes
Service	Test Service
Name	Arthur Dent >
Address	5836 Westslope Dr   Austin, TX 78731
Community	Cat Mountain Villas
Pri Phone	<u>(333)_333-3333</u> %
Email	arthurd@hitchhikersguide.com ⊡
En Route	None
Confirmatio n	Email to arthurd@hitchhikersguide.com
Lead Source	Internet
Service Agent	Chuck Walls
Proposal	view 2

### **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.

	9:51	.II 🗢 🗆
<	Finish Appointment	
	Detaile	
	Monster Slaying \$1,000.00 Negative results on the real estate value	ue.
	Add Tap to add a new item	
	Inventory >	
	Subtotal	\$1,000.00
	None >	\$0.00
	Total	\$1,000.00
	Internal Notes	
	Customer Notes	
P	Payment	
	Signature	>
	Payment Method	٥

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.

9:51		🗢 🗔
<	Detail Line	
🎟 Search		
Category		\$
Part		\$
Description		
Internal Notes		
Internal		$\bigcirc$
Exchange		$\bigcirc$
Quantity		
Unit Price		
Extended		
Extended		

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:
---	---

12:50 🔌	al LTE C	<b>)</b> ,		12:55 🔌	ad y	TE 🔘
<	Review Media	+		< Rev	view Media	+
Photos	Select Filter					
				Start by adding + bu	some media usir tton above.	ng the
_	Save					
you can remove	or add any photos yc	bu have				
n so far. on a photo to ad	d notes or tags.		From he A. Add p	ere, you can: photos and click S	bave.	
e you are happy w can click Save.  Yo vintment.	vith the photos on thi bu will be returned to	s screen, the	B. Click	the back arrow t	o return to the	appoin

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.

<	Finish Appointment			Appointment Details
Service	Step 1		Appointm	ant
Name	Katie_Test >		Scheduled	Fri, Mar 28, 2025 at 10:50a
Address	1234 Service Circle   Fort Worth, 76244	×	Duration	30 minutes
Pri Phone			Actual Start	Thu, Mar 27, 2025 at 10:51a
Alt Phone		N I	Service	Step 1
Current	-41 minutes		Name	Katie_Test >
Duration			Address	1234 Service Circle   Fort Wort
Details			Pri Phone	1470246 7 0
Step 1		_	Alt Phone	
Add Tap to add a ne	w item		Alt Flidile	
Inventory >			Email	smvideotutorial@gmail.com 더
Subtotal	\$0.0	0	En Route	None
None >	\$0.0	10	Confirmatio n	
Total	\$0.0	0	Lead Source	Existing
				Allowed Design

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.

### 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,

### 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.

1	Kitchen	\$79.00	\$79.00
	Clean full kitche major appliances	n including stove, o s.	ven and
Add			
Tap t	o add a new item		
		Subtotal	\$129.00

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.

<	Schedule Proposal	
Date	06/12/2025	
Ad Hoc		$\bigcirc$
Queued		$\bigcirc$
Timeframe		
Available S	lots Q Filter agents	
Thu, Jun 12, 2 Gmail Agent 19 hours 15 m	2025 at 6:00a iinutes	
Thu, Jun 12, 2 Monroe Agen 19 hours 15 m	2025 at 6:00a t inutes	

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

Available Slots		ď
Britney Bowen - 6/12/2	25 9:45 AM	0
Additional Agents	Q Filter agents	
Bonnie McMurray		
Cody Test Agent		
Demo Agent		•••

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.

Tentative	$\bigcirc$	
Confirmation to anotherfakeemail@	whatever.com	
		Schedule!

## 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.

> Scheduling	Logged in as Karen Libb
Require Payment Info	Check this box if you want to require a credit card to make an appointment.
Operational Options	
Appt Start Proximity	150
Duration Alert	Display a warning unless within this many feet of the contact's pin location % If an appointment is being finished earlier than this percentage of the expected duration, the service agent will see a warning
Require Confirmation	Require user to confirm when starting outside proximity
Dequire Internal Note	Require user to add internal note when finishing
App Gallery Upload Limit	20
Send Internal Note Alerts	Send alerts for appointments finished with internal notes
Global Appointment Flash	
	Displays on all appointment details pages for service agents
Miscellaneous Options	

### 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.

	•	•		• •	
Porm		inn	$() \times i$	arrid	PC
CIII	100		$\bigcirc$ v		00

Grant/Deny				
Access All Features	Grant	<ul> <li>Deny</li> </ul>		
Арр	<ul> <li>Grant</li> </ul>	ODeny		
Appointments:Email	Grant	<ul> <li>Deny</li> </ul>		
Appointments:Finish:AddParts	Grant	Deny		
Appointments:Finish:SendCompletion	Grant	Deny		
Appointments:Grid:All	Grant	Deny		

# Troubleshooting

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.

Unlimited Text?
Copy From Previous
Increment From Previous