Integrations

04/11/2025 10:55 am CDT

Payment Processors and Financing

serviceminder|pay

Did you know the average franchisee pays around 3.5% in payment processing fees, which can limit growth potential? That's why we're offering a solution to help our clients eliminate these high fees—**serviceminder|pay**. With **serviceminder|pay**, we're not just reducing costs—we're changing the way you manage payments, boosting efficiency, visibility, and profitability.

As a trusted franchise supplier for over 12 years, supporting nearly 60 brands and more than 2,500 franchisees, we've continuously tackled our clients' challenges with a comprehensive approach. Now, we're going a step further to remove another major obstacle from your brand's daily operations: the hassle of payment processing fees, visibility, and reconciliation reports from third-party gateways.

With our new solution, service**minder** users can benefit from:

- Get started with no commitments, payments included, and no minimums or monthly fees
- Instant approval with prefilled applications
- Direct support from the service**minder** client success team—no extra vendor to manage
- Faster access to your funds
- Reconciliation and reporting all in one platform
- Seamless integration with QuickBooks Online
- Instant approval and clear, transparent pricing

Sign up for serviceminder|pay!

Your browser does not support HTML5 video.

Authorize.Net

A trusted payment gateway owned by Visa, offering secure credit card processing, fraud prevention, and recurring billing solutions for businesses of all sizes. Known for its strong fraud prevention tools and ability to support multiple payment methods, including e-checks and digital payments.

If you don't have a merchant account, you can set one up through Authorize.net. If you do have a merchant account,then you can set up just a gateway. There are two types of Authorize.net accounts:

- AIM: Supports credit card processing only, but no card storage
- CIM: Supports credit card storage and processing, enabling "card on file" functions

The AIM gateway is less expensive than the CIM gateway, but the CIM gateway allows you to store credit card numbers at Authorize.net. If you have a CIM gateway, service**minder** will let you store credit cards with specific contacts and then you will have the option to select "card on file" as a payment method.

To connect service**minder** and Authorize.net, log into your authorize.net account and generate an API login and transaction key. Then copy these two values into the same labeled fields on Control Panel > Integrations.

Need help finding your API Login ID and Transaction Key in your Authorize.net account?View Authorize.net Support Instructions Here.

Click Here to Learn More

CyberSource

A global payment and fraud management platform by Visa, providing enterprise-level security, multi-channel payment acceptance, and advanced fraud detection tools.

Click Here to Learn More

Franchise Payments Network

A specialized payment processing provider tailored for franchises, offering custom solutions, reporting, and support for multi-location businesses.

Click Here to Learn More

Ingenico

A global leader in payment solutions, known for its secure point-of-sale (POS) terminals, e-commerce gateways, and omnichannel payment processing.

Click Here to Learn More

OpenEdgePay (Now Global Payments Integrated)

A division of Global Payments that delivers integrated payment processing solutions for software developers and businesses across various industries.

Click Here to Learn More

Payment Pilot

A modern payment processor focusing on transparent pricing, seamless integrations, and secure transactions for merchants.

Click Here to Learn More

Payrix

A flexible payment processing company offering secure, cloud-based solutions with a focus on seamless integrations and data security.

Click Here to Learn More

QuickBooks Payments

A payment processing service by Intuit that integrates directly with QuickBooks, allowing businesses to accept credit cards, ACH payments, and manage invoices efficiently.

If you already use QuickBooks Online for accounting purposes, you might also be using QuickBooks Payments. You can connect QuickBooks Payments and enable online payments directly within service**minder**.

To enable this payment gateway, just select the QuickBooks Payments from the payments integration dropdown list, and you'll be given an option to Connect to QuickBooks. Follow that link to sign-in to QuickBooks Payments and authorize your connection to service**minder**. Note that the same "Connect to" mechanism is used for both QuickBooks Online and QuickBooks Payments -- you'll be given a couple of checkboxes to choose what you want to connect to. You can connect to QuickBooks Online, to QuickBooks Payments, or to both.

Learn more about our QuickBooks accounting integration HERE.

Click Here to Learn More

Stax

A subscription-based payment processor that provides unlimited credit card transactions for a flat monthly fee, helping businesses save on processing costs.

Click Here to Learn More

TSYS

A major payment processor offering merchant services, secure transactions, and customizable payment solutions for businesses of all sizes.

To connect service**minder** and TSYS:

- Log into your TSYS account (Transaction Express) account and get your Gateway ID and Reg Key.
- Then copy these two values into the same labeled fields on Control Panel > Integrations.

That's all there is to it. All of the credit card processing functionality will turn on automatically, including saving cards on file.

Click Here to Learn More

WorldPay

A leading global payment provider offering credit card processing, e-commerce solutions, and multi-currency support for businesses worldwide.

Click Here to Learn More

Zift

A payment processing company providing secure, flexible, and customizable payment solutions for businesses and software platforms.

Click Here to Learn More

Wisetack - Consumer Financing

Consumer-friendly financing, integrated with service**minder** makes it easy for your customers to afford the work they want. They pay over time, while you get paid when the work is complete. View our Webinar and Blog Post for more information.

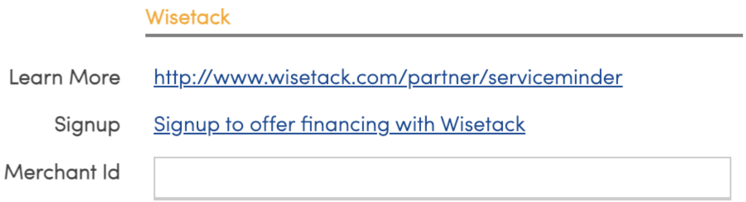
Click Here to Learn More

Already signed up for WiseTack?

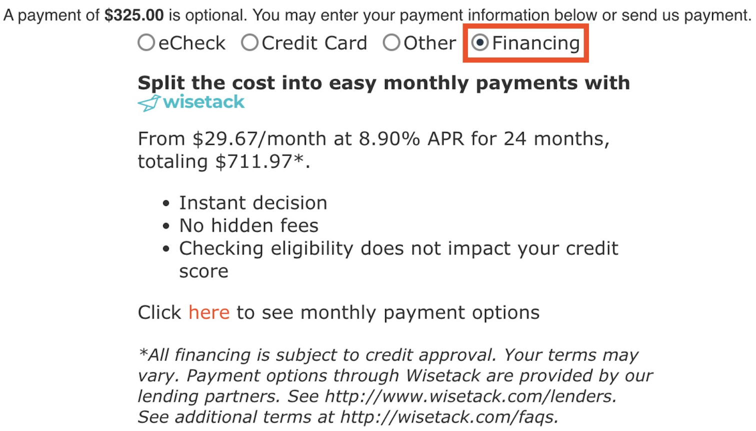
For the integration to work with service**minder**, you'll need to sign up via our link (described below) so the correct merchant ID will flow over to our side.

Signing Up

In **Control Panel > Integrations > Other**, find the Wisetack section and follow the Sign Up link. When you are ready to go live, you will need to submit a support ticket requesting that a "Live" box be checked for you.



When the account is connected, the Financing option will appear on proposals and invoices automatically next to your other standard payment options. It will calculate the pricing based on the total and your specific Wisetack settings.



WisetackFAQs

How do my customers know they can apply for financing with Wisetack? What do they need to do?
Once you've connected your account, a section will show up on proposals and invoices for your customers to click and apply. If approved, that info is sent to us and recorded in service**minder**.

Do payments to Wisetack show up on the invoice?
Payments do not automatically record on the invoice for approved customers, so you will manually record those

payments on the open invoice in SM.

Why isn't the apply section showing up on my customer's proposal?
If the section isn't showing, it could be that the Wisetack merchant ID is incorrect in your service**minder** account. Another reason is if you have a maximum amount for financing set up in your Wisetack account, the proposal may have a total higher than that.

Accounting

Your business "vitals" - P&L's, balance sheets, operations data - are vital to your success. service**minder** supports the following integrations:

Quickbooks Online

Paro

Paro is a full-service, outsourced finance department for small businesses. They enable business owners to focus on growth by managing their bookkeeping, accounting, forecasting, and tax needs. Paro also offers franchise packages designed to efficiently support both franchisors and franchisees.

Mission

Paro's mission is to serve as end-to-end finance support for small businesses and franchises. Our model starts by understanding your needs and current pain points in detail. The result is a prioritized set of projects designed to eliminate your back-office headaches and provide consistent insights into the financial health of your business. During franchise engagements, our focus is on optimizing processes and standardizing financial insights across multi-unit operations.

Interested?

Once a need is identified - whether it be bookkeeping, accounting, financial modeling, tax, and/or part-time CFO support - Paro coordinates a team of professionals uniquely qualified for your business. Every professional in Paro's network is highly vetted; we currently are accepting only 7% of applicants into our talent pool. But we go the extra mile to match you with individuals who not only have the correct skillset, but also the domain expertise that can only come from working with other firms in your industry. By deploying professionals on a part-time basis at highly competitive rates, we consistently deliver cost-effective solutions.

The result? Give us a 30 minute call and we'll give hours of your life back each month and a trusted, on-demand financial advisor for the future. Just click the link below and someone will contact you shortly to discuss your needs.

Cultivate Advisors

Learn how to do more with all the stats that serviceminder.io generates with Cultivate Advisor's tailored 1:1 business advising services.

Cultivate Advisors helps passionate entrepreneurs & owners achieve financially rewarding businesses that grow and thrive. They offer tailored 1:1 advising, access to hundreds of resources, and a community of small business owners to help you grow your business at an exponential rate.

To learn more, visit Cultivate Advisors today!

GbBIS

GbBIS offers analytics, data, and mapping solutions for your franchise from the top down, C-Suite to Franchisee. Plan your growth strategy with market insights you can trust.

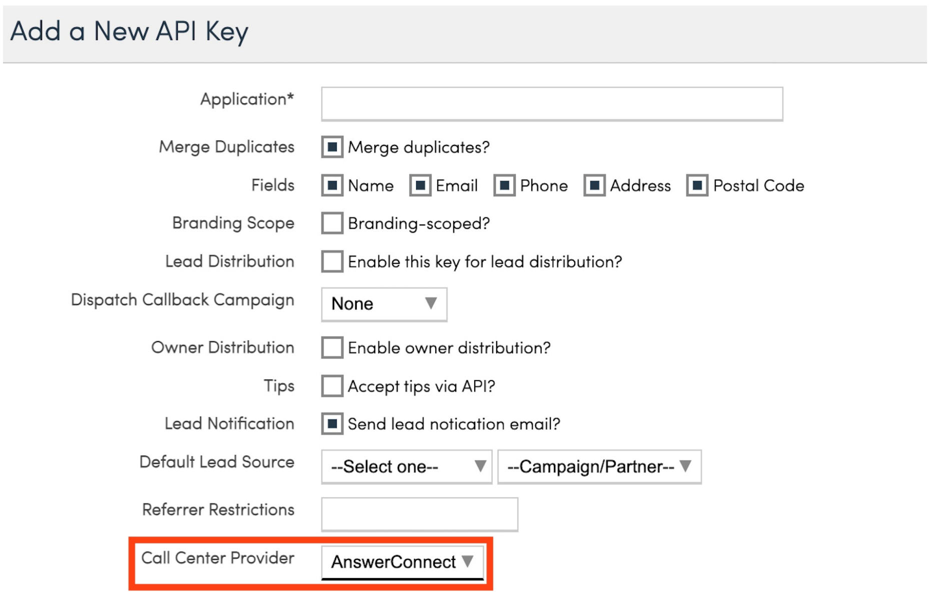
Click here for Website

Webinar

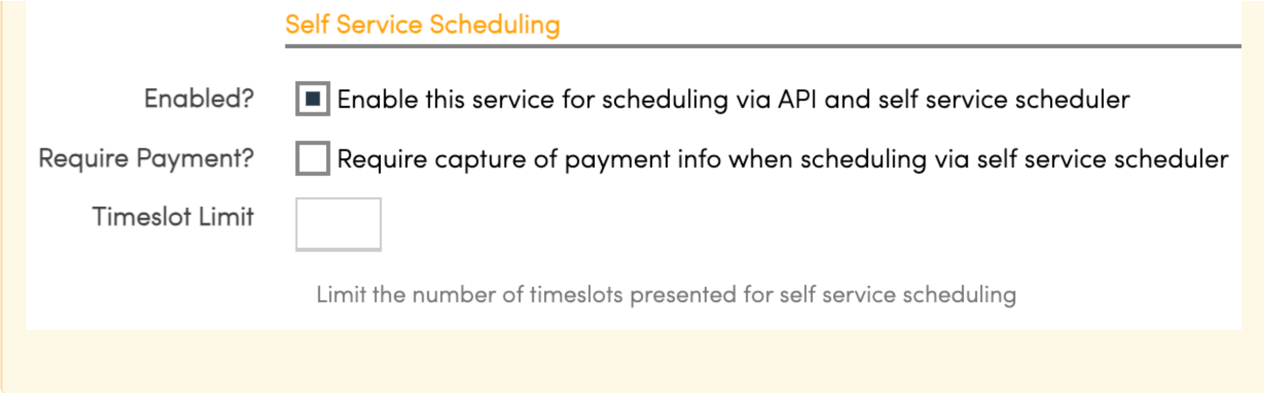
Answering Services

Call Center API Keys

In order to ensure it's linked up correctly, the API key needs to have the **Call Center Provider** selected in the dropdown menu.



For services to be available for booking through an API key, they must be set to**self-service**. Enable this by editing the service and finding the **Self Service Scheduling** section, then checking the box for **Enabled.**



AnswerConnect

AnswerConnect is a people-powered live answering service. They provide virtual receptionist services, so you can have someone available 24/7 to answer your calls, schedule appointments, and do all the other things you'd expect from a receptionist.

Webinar | Blog

Franchise Answering Service

Professional, upbeat, friendly customer service experts answer your calls, reinforce your brand identity and ensure the lead and the appointment are captured.

Tightly Coupled

AnswerConnect staff answer your phone as if they are your staff and have direct access to your serviceminder clients and appointments. They can add new clients and then schedule appointments based on your team's availability and your configured scheduling constraints — as if you were scheduling it yourself.

AnswerConnect is on 24x7 so you don't have to be.

Perceptionist

Founded over 24 years ago, Perceptionist Inc has become one of the largest North American providers of small business call center services.
They provide a way for businesses to capture 100% of their sales opportunities by offering overflow sales support during days, evenings, and weekends. Instead of sending customers to voicemail, calls are redirected to a team of specially trained sales representatives who know the business and have the skills to close the sale.

They specialize in supporting independent and franchise service businesses in the US and Canada. They provide:

- Inbound and Outbound Sales Support
- Chat Service and Messenger Sales
- Internet Lead Sales
- Software Integration Solutions

Perceptionist can be added through the MarketPlace or by creating an API key for them to use for scheduling.

Unique **Perceptionist Custom Fields** will display at the very bottom of each service details page (Control Panel > Services).

Nexa

Sign up here | **Home Services Experts**

Nexa is a leading provider of call answering and remote receptionist solutions for home services businesses across the country.

We train our receptionists to specialize in your business' procedures. Whether it's answering a call to capture a new lead, or turning a new lead into a booked appointment, Nexa is ready to help you make the most of every call you receive, 24/7/365.

Our 500+ home services clients across the United States have benefited from our industry expertise. Nexa serves everyone: HVAC businesses, plumbers, electricians, commercial technicians, franchises, and more.

Learn more here.

Download the case study on how we helped an HVAC company increase customer conversions by 20%.

Don't forget to ask about special pricing for service**minder** clients!

ProNexis

It's more than just an answering service! Access 24/7 sales & support, digital lead conversion, and business growth solutions all designed especially for home service businesses. With trained agents to answer your phones and technology like their Lead Machine, ProNexis can help grow your business with service**minder** integration

Webinar

Contact: VP of Sales Bryson Naylor (831)747-4771 bryson@pronexis.com

More Info

Lead Generation

Angi

Angi (formerly Angie's List) is a very popular service that consumers use to find service providers. When they narrow down what they are looking for, their information is then shared with service providers. If you choose to buy the lead, Angie's List will then send you the consumer's contact info.

Angi supports integrating with service**minder** so you can just click a link and the consumer's info will be added to your account. It takes just a couple of steps to set up the integration and requires you to send some information to Angi so they can set up the connection.

Create an API Key

The first step is to create an API key. This is a magic identifier that will be given to Angi that uniquely identies your account. When Angi sends the lead to us, we use that to figure out which account the lead should go in to.

To create an API key, go to Control Panel > API Keys > Add. Type in a name (such as "Angi") and then select a channel and optional campaign to use for these leads. For example, you may choose "Online" for your channel and "Angi" for the campaign. (You may need to set up the channel and campaign if you don't already have one).

Note: if you set your key to brand-scoped with lead distribution turned on, then you can use this integration to distribute leads based on zip code. You'd only need one key for your entire brand with this method.

Notify Angi List

Angi may require the following information to set up your integration:

Testing Endpoint URL: https://staging.serviceminder.io/webhook/angieslist

Production Endpoint URL: https://serviceminder.io/webhook/angieslist

X-API-KEY: Give them the API key you created in the step detailed above

Success string: we will return a JSON response with the word "success" in the payload to indicate the lead was successfully added.

Home Advisor

Home Advisor is a very popular service that consumers use to find service providers. When they narrow down what they are looking for, their information is then shared with service providers. If you choose to buy the lead, Home Advisor will then send you the consumer's contact info.

Home Advisor supports integrating with service**minder**.io so you can just click a link and the consumer's info will be added to your account. It takes just a couple of steps to set up the integration and requires you to send some information to Home Advisor so they can set up the connection.

Create an API Key

The first step is to create an API key. This is a magic identifier that will be given to Home Advisor that uniquely identies your account. When Home Advisor sends the lead to us, we use that to figure out which account the lead should go in to.

To create an API key, go to Control Panel > API Keys > Add. Type in a name (such as "Home Advisor") and then select a channel and optional campaign to use for these leads. For example, you may choose "Online" for your channel and "Home Advisor" for the campaign. (You may need to set up the channel and campaign if you don't already have one).

Send Email to Home Advisor

Once the key has been generated, copy it and then send an email to crmintegrations@homeadvisor.com. Include the following information in the email:

service**minder**.io Integration Company Name: your company's name HomeAdvisor Account Number or Phone Number: either your HA account number or the phone number where they all you with new leads CRM Key: put the API Key you generated here.

Once you send them this email, they will update your account and let you know how to fetch the leads.

Craftjack

Craftjack is a popular service that consumers use to find service providers. When they narrow down what they are looking for, their information is then shared with service providers. If you choose to buy the lead, Home Advisor will then send you the consumer's contact info.

Craftjack supports integrating with service**minder** so you can just click a link and the consumer's info will be added to your account. It takes just a couple of steps to set up the integration and requires you to send some information to Home Advisor so they can set up the connection.

Create an API Key

The first step is to create an API key. This is a magic identifier that will be given to Home Advisor that uniquely identies your account. When Craftjack sends the lead to us, we use that to figure out which account the lead should go in to.

To create an API key, go to Control Panel > API Keys > Add. Type in a name (such as "Craftjack") and then select a channel and optional campaign to use for these leads. For example, you may choose "Online" for your channel and "Craftjack" for the campaign. (You may need to set up the channel and campaign if you don't already have one).

Note: if you set your key to brand-scoped with lead distribution turned on, then you can use this integration to distribute leads based on zip code. You'd only need one key for your entire brand with this method.

Craftjack Webhooks

The URL you'll configure in Craftjack will be:

https://serviceminder.io/webhook/craftjack/__api-key__

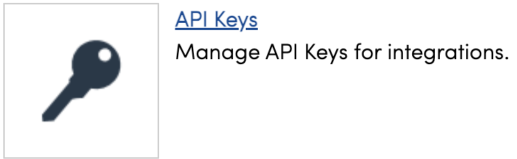
Lead Capture Forms

Overview

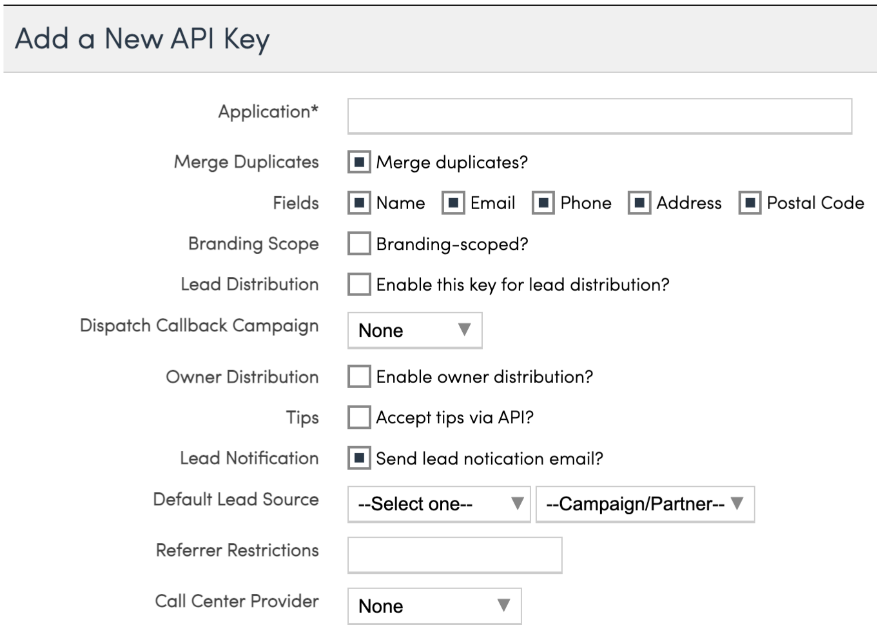
You can post data directly to service**minder**.io via HTTP FORM POSTs. This is most often used to set up lead capture forms on your website or on a digital marketing landing page. You can use this method to integrate with landing pages hosted on sites such as InstaPage and Unbounce. Just design a form and make sure the field names match the ones shown below (plus any custom contact fields you have set up). Then set the action to a URL that points to serviceminder.io.

https://serviceminder.io/service/contact/addupdate/*APIKey*

You'll first need to create an API key. You can do this by going to **Control Panel > API Keys** and clicking **Add**.



You'll provide the basic details about your API Key and configure a few specific settings for it.



For a Lead Capture form, the important fields to consider are:

- **Merge Duplicates -** If leads come in with the same details, do you want them to automatically be merged with the existing contact?
  - **Fields -** Which fields do you want to cross-reference when deciding to merge?

> If a duplicate contact is merged with a different lead source from the original contact record, this new lead source will be tracked in the system and tied to the invoice. Learn more about that **HERE**.

- **Lead Distribution -** This decision is made at the brand level when deciding to distribute leads to various territories/locations within the brand. If you are a single organization, do not check this box.
- **Owner Distribution -** If you have Contact Owners enabled, you can distribute leads that come in via this API key in a round-robin style.
- **Lead Notification -** If this box is checked, an email will be sent to the designated Lead Notification email address (set up in Control Panel > Notifications).
- **Default Lead Source -** This will place all leads that come in from this API key into a specific Channel and Campaign, if designated.

Once you have your API key, you'll then configure your form's **ACTION** to point to the **URL**. We recommend creating a separate API key for each form you create. This will allow you to better track which form a contact came from.

If you enable Lead Distribution for the API key, we'll use the zip/postal code from the form to distribute the new lead] to the correct organization. You can read more about Lead Distribution here.

This can also be used to send data from one website to another. For example, in Zapier, you can specify a FORM POST action for a step that is triggered when someone completes a form on your website.

We support the following form fields:

Field	Details
Email*	
Name*	or **FirstName** and **LastName** as separate fields
Company	
Address1*	
Address2	
City*	
State*	
PostalCode*	
Phone1*	
Phone1Type	
Phone2	
Phone2Type	
Notes	A single value that will be added as a note to either the new contact or an existing contact. By default, the Title for the note will be "Form"
ContactType	Maps to Contact Category - typically “Customer” or “Prospect”
Channel	A unique channel – if it doesn’t exist, we will create it or apply a default
Campaign	A unique campaign within the channel. If it doesn't exist, we'll create it. If not supplied, we will leave blank
Tags	Comma separated list of Contact Tags to add to the contact
ReferredByHash	The contact.hash value from the referring contact
RedirectURL	If this field is included, service**minder** will return a 302 redirect response to the value in the field rather than a JSON payload with the results
HashKey	The contact.hash value from the contact you want to update. This can be embedded in a hidden field in the form

In addition to the above standard fields, you may also include custom contact fields defined in your account. The field name for each custom field is shown on the custom field details page labeled "Form Field." Custom fields will all start with a "cust_" prefix.

The format of the body must be the same as if it was a regular FORM POST -- application/x-www-form-urlencoded -- this is the default encoding for FORM POST operations so you shouldn't need to do anything special.

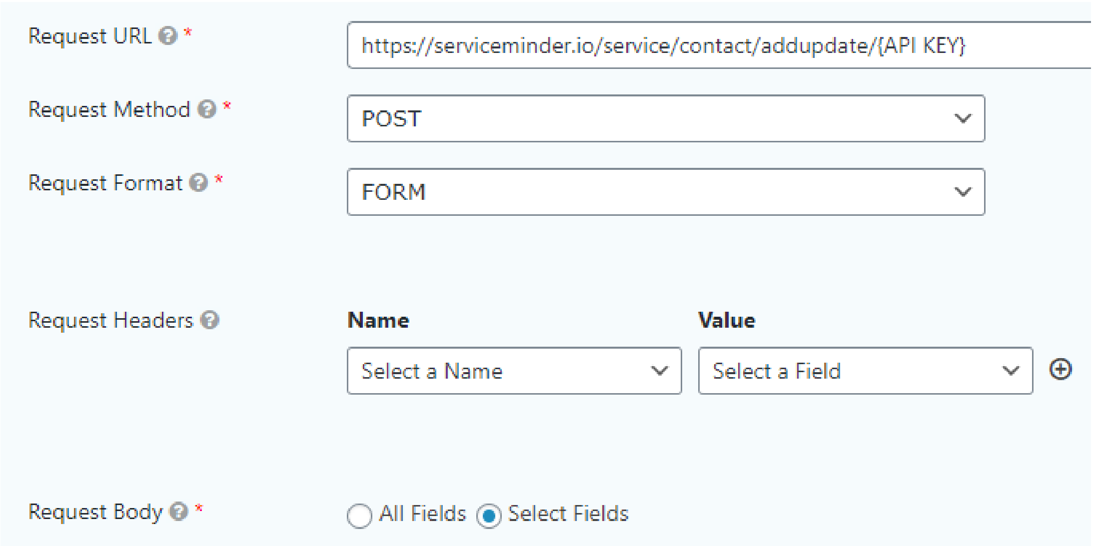
The posted form returns a JSON-formatted response with the following properties (if a RedirectUrl value is not present):

- Result => A value of 0 indicates success. A -1 indicates an unexpected error. A 1 indicates a validation error (such as missing name or email fields)
- ContactId => The internal identifier of the added (or updated) contact.
- Message => A text message with either the error info or validation info

If a value of 0 is returned for Result, then the operation was successful and you can redirect on to the next page. Any other value indicates that the data was not saved and so you should either allow the user to correct and re-submit or you may want to log the data for processing later.

Gravity Forms with Webhooks Add-on

Configuring Gravity Forms to POST to ServiceMinder is fairly straightforward. In a new Webhook Feed, place the Contact update URL with your API Key into the URL field, set the method to POST, the format to FORM, and the body to "Select Fields" so that the fields can be correctly named.



Wix Integration

If you would like to pipe a contact form on your Wix site into ServiceMinder, enter the editor and, under the "Dev Mode" menu item in the top bar, enable Corvid Dev Mode. You may now directly modify the backend and page code. You will need to create a new module in the Backend folder and include the following code:

```
import {fetch} from 'wix-fetch';

export function serviceminderPost(params_string) {
  const url = 'https://serviceminder.io/service/contact/addupdate/';
  const key = 'YOUR_API_KEY';

  let full_url = url + key;

  const headers = {
    "Content-Type": "application/x-www-form-urlencoded"
    };

  return fetch(full_url, {'method': 'post', 'headers': headers, 'body': params_string});
}
```

Then, in the code for the page containing your lead capture form, adapt the following for your form and the name of your backend form module:

```
import {serviceminderPost} from 'backend/formModule';

export function submitForm(event) {
   let FirstName = $w('#input1').value;
   let LastName = $w('#input2').value;
   let Email = $w('#input3').value;
   let Phone1 = $w('#input4').value;
   let Address1 = $w('#input5').value;
   let Address2 = $w('#input6').value;
   let City = $w('#input7').value;
   let State = $w('#input8').value;
   let PostalCode = $w('#input9').value;
   let Notes = $w('#textBox1').value;
   let params_string = `FirstName=${FirstName}&LastName=${LastName}&Email=${Email}&Phone1=${Phone1}&Address1=${Address1}&Address2=${Address2}&City=${City}&State=${State}&PostalCode=${PostalCode}&Notes=${Notes}`;
   serviceminderPost(params_string).then(response => console.log(response));
}
```

Once all of the correct code is in place, you'll need to hook the submit button to the submitForm function. Enable the Properties Panel underneath "Tools" in the top bar. Then, click the submit button of your form in the editor to bring up its properties. Click the plus next to the "onClick" event in the list and type the name of the submit function (e.g. "submitForm").

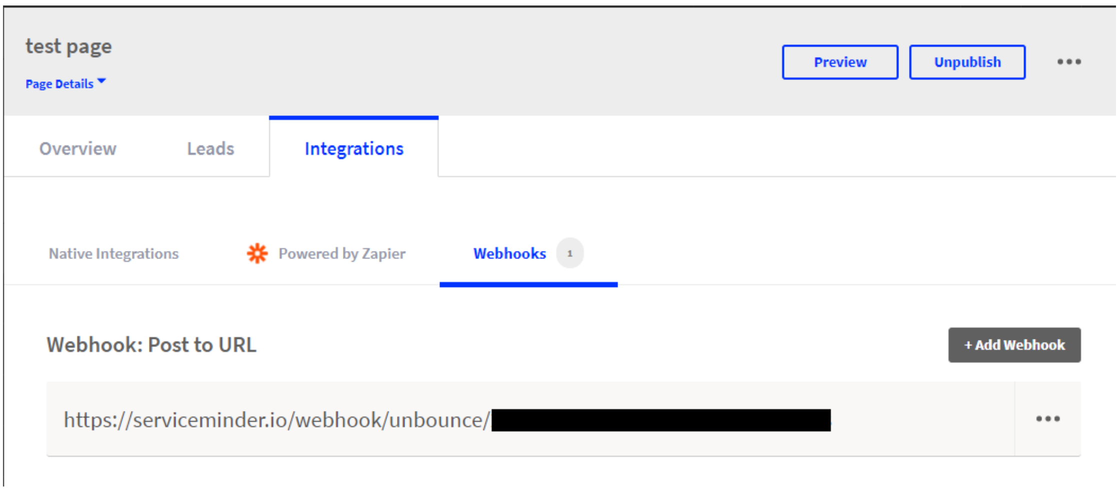
Your Wix form should now post straight into your ServiceMinder API key. If you are having issues with integrating your form, see the following articles for reference: https://support.wix.com/en/article/corvid-tutorial-adding-custom-interactivity-with-events

https://support.wix.com/en/article/corvid-tutorial-sending-an-email-on-form-submission

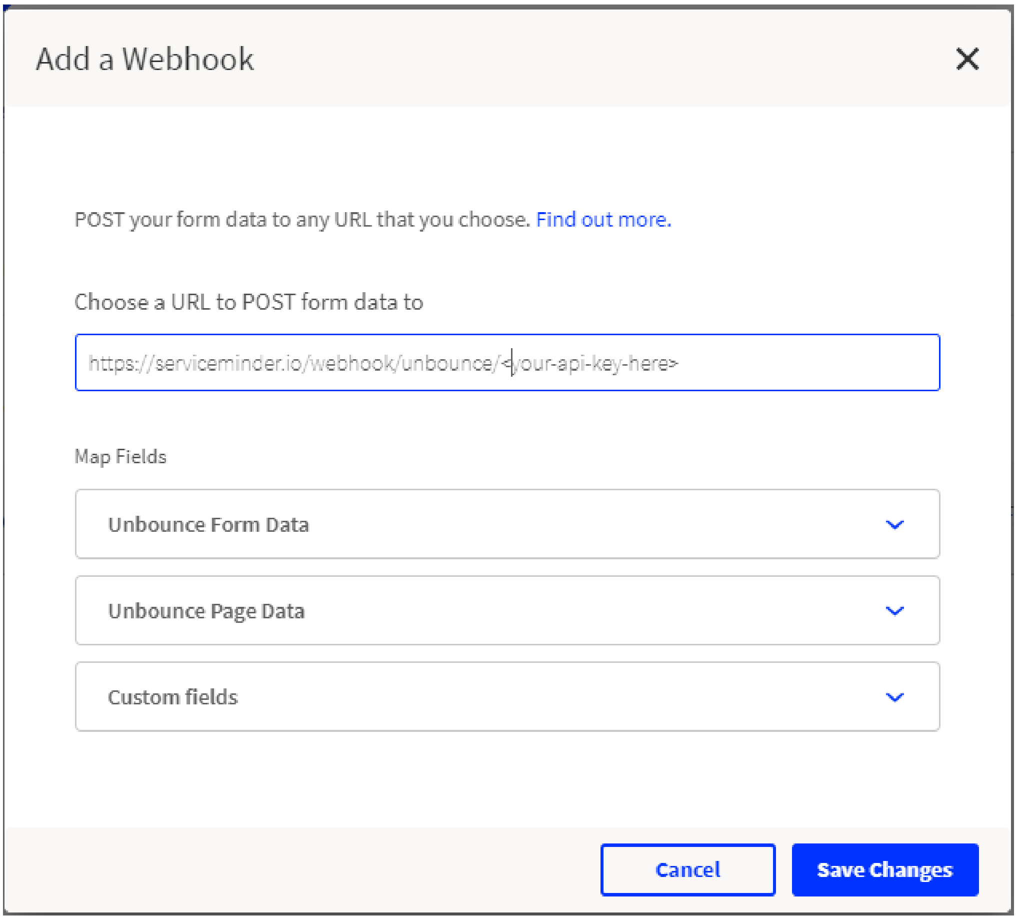
https://support.wix.com/en/article/corvid-accessing-third-party-services-with-the-fetch-api

Unbounce Integration

service**minder**.io supports Unbounce's proprietary webhook mechanism. To connect a page hosted by Unbounce to service**minder**.io, go to the page and then select the Integrations tab.



Select **Add Webhook** and fill in the URL to point to service**minder**.io's unbounce endpoint, being sure to put your API key on the end:



Unbounce will do a quick test to make sure the URL is valid and then you're set. You can now test your form. Keep in mind that Unbounce de-dups form submissions so make sure you enter unique values for each test.

Zapier Integration

service**minder**.io supports Zapier's proprietary webhook mechanism. To send data in a Zap to service**minder**.io, you'll need an API key from service**minder**.io and then you'll need to map the Zap's fields to the above list of available fields. You can see a walkthrough of the steps for this on this page.

Google Lead Forms

To link up with Google Lead Forms, you can use a direct webhook service**minder** set up: https://serviceminder.io/webhook/googlelead/{api-key}

Marketing and Reputation Management

Birdeye

Collect reviews, convert leads, run surveys, text customers - all in one place. As soon as an appointment is completed or a customer is invoiced, we'll automatically send their info over to Birdeye. They'll take everything from there.

Watch Birdeye webinar now...

Don't Have Birdeye? Visit www.birdeye.com and get a demo!

CallRail

Want more info about CallRail? Click Here

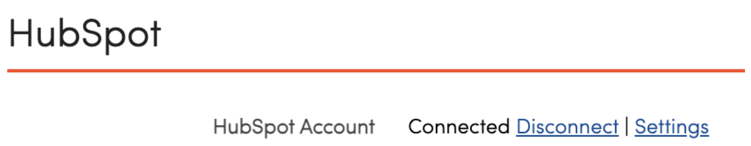
Already have a CallRail account? Here are your easy integration steps:

- Step 1: You need to login to your CallRail account and get the "API V3 Key" (copy that)
- Step 2: Control Panel > Integrations > marketing tab, Paste the API V3 Key to the CallRail box and save
- Step 3: Control Panel > Call Tracking (this will show up once you have added the API Key)
- Step 4: Your phone numbers with CallRail will show up on this screen, click "Assign" and pick the Channel and Campaign you want linked to that phone number.
- Step 5: Do Step 4 for each phone number

Hubspot

Easily connect your HubSpot account to ServiceMinder to automatically push leads into your CRM and streamline your marketing and sales workflows.

Step 1: Connect Your HubSpot Account



1. Navigate to **Control Panel > Integrations > Marketing** tab.

2. Navigate to **Control Panel > Integrations > Marketing tab.**

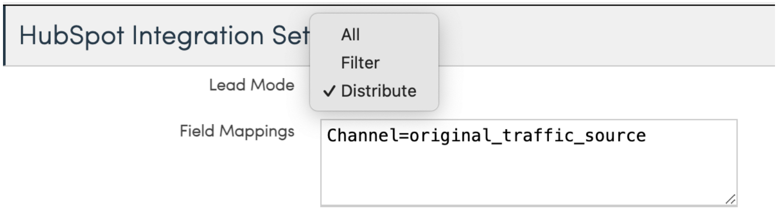
3. Click **Connect** next to the HubSpot integration.

4. Sign into your HubSpot account and **grant access** to ServiceMinder.

Once connected, standard contact fields—such as **Name, Email, and Zip Code**—will automatically sync from HubSpot into ServiceMinder whenever a new contact is added.

> **Important:** This is a *one-way* sync—from HubSpot **into** ServiceMinder. Leads or contact updates created in ServiceMinder will *not* push back to HubSpot.

Step 2: Map Custom Fields (Optional)



To sync custom fields from HubSpot:

1. Click **Settings** under the HubSpot integration in the **Marketing** tab.

2. Use the format:
   `yourSMCustomFieldName = yourHubSpotCustomFieldName`

3. Save your mappings.

This allows HubSpot custom properties to populate your ServiceMinder contact fields.

Custom field mapping only works *after* you've connected your account. Changes will apply to new leads going forward.

Enhanced Integration Features

Marketing Attribution Fields

The following fields now sync from Hubspot to service**minder** when mapped:

- **leadsource**
- **channel**
- **campaign**

To ensure data syncs correctly from HubSpot into ServiceMinder, the internal field names in HubSpot must exactly match the format in service**minder.** For example, "Lead Source" will not work, it must be "leadsource".

If you prefer to combine both Channel and Campaign into a single field, you can do so using the **leadsource** field. To format it correctly, separate the two values with a forward slash (`/`).

Example:
`Internet/Google AdWords`

These fields will populate automatically when leads are created in HubSpot and sync over to service**minder**, providing clearer attribution and more accurate marketing performance reporting service**minder.**

Lead Distribution by Postal Code

You can now route incoming HubSpot leads to specific organizations based on zip code:

1. In the **Marketing** tab, click **Settings** under your HubSpot connection.

2. Use the **top dropdown** to select **Distribute**.

3. Ensure your **field mappings** are configured to support lead routing.

Key Notes & Limitations

- This integration begins syncing **only from the time of connection forward**. It does *not* backfill existing HubSpot contacts.
- New contacts created in ServiceMinder will **not** sync to HubSpot.
- Only the **HubSpot account connected at the brand level** can distribute leads across organizations.

Infusionsoft

How serviceminder.io Talks To Infusionsoft

Infusionsoft is a marketing and sales automation platform. It also supports something they call "Goals" to trigger campaigns. service**minder**.io pushes contacts and optionally invoices to Infusionsoft when they are created. Contact data pushed over includes basic name/email/phone info as well as address fields.

Trigger Events

Data is pushed to Infusionsoft when certain trigger events occur. These events include the generation of invoices as well as booking and completing appointments. When these events happen, the related contacts are pushed over and the API Achieve Goal is called with the goal name based on the Service Name of the related appointment. The Call name is constructed as follows:

- All spaces and special characters are removed from the service name. For example, "Service Call" becomes "ServiceCall"
- Booked or Completed is appended depending on whether the related event was for the appointment being created or the appointment being marked as complete.

The Integration name should be "ServiceMinder".

Listen360

Listen360 is a popular platform used by franchise systems to help identify and nurture influencers. They work primarily with franchise systems. As such, configuration of Listen360 is done at the Branding level within service**minder**.io and so is not available for our retail customers (or brands that don't currently use Listen360).

PulseM

The #1 reputation management platform built for home services. Easily connect with industry-leading field management software, instantly manage customer service interactions from any device, and turn customer reviews into your competitive advantage.

Click here for information

Scorpion

An all-inclusive advertising solution to empower your brand. Instead of relying on multiple vendors for your website, marketing, and advertising, get it all from a single partner who constantly innovates to build a better way for your brand.

Click here for more info

SendJim

Use SendJim to:

- Maximize Your Existing Clients and Make Them Raving Fans
- Hyper-Target Your Audience to Get the Leads You Want
- Create Long-Lasting Relationships with Your Clients to Turn Them into Higher Ticket Sales

SendJim will automatically trigger mailing sequences when you close an invoice in your ServiceMinder account. That means once you go through the quick setup process, there is no need to ever log into SendJim again. Sit back and watch the magic happen! Watch SendJim webinar now...

Have questions or want to signup, go to SendJim.io for details.

Signpost

Signpost is a great tool for automating the curation of reviews and referrals from normal customer interactions. All that's needed to kick things off is a mobile phone number or email address for each customer. Luckily service**minder**.io already has that data. Once someone becomes a customer, service**minder**.io will push the customer info to Signpost. Signpost then takes over and does it's thing.

Configuration

To get things configured, you'll need your Signpost Merchant ID. If you don't know it, or don't know how to get it, just log in to Signpost and open a support ticket and they will help you get that.

Once you have it, just go to Control Panel > Integrations and then click on the Marketing tab. You'll see an entry for Signpost with a spot to put in your Merchant ID. Just paste it in there, hit Save and you're done. New customers will automatically push over to Signpost.

What Types of Data

service**minder**.io will push over the customer's name, email address and phone numbers to Signpost.

Voxie

Voxie uses AI and natural language processing to gather sentiment from your customers, and then gives the best customers a simple way to provide a positive review.

To set up your Voxie integration, you will need your Voxie API key as well as your Team ID.

Go to Control Panel>Integrations>Marketing Tab

> Scroll down to Voxie

> Enter your API key (from Voxie), your Team ID and when you want the review to be trigggered.

Make sure "Enabled" is checked, and hit Save.

WebPunch

Collect, quantify, and view your customer feedback to make data-driven decisions about your business. Address specific areas that need improvement and recognize areas of success.

Connect with serviceminder.io to keep all your customer review data in one place and drive business outcomes.

Webinar

Blog Post

33social

In addition to helping clients get found online through organic SEO, 33social is a certified Google Partner Agency.

33social also specializes in email marketing and drip marketing planning/execution. 33social relies heavily on a variety of analytics to provide smart consulting and analytics-based recommendations to help its clients achieve their digital marketing goals. Founded in 2010, 33social specializes in working with franchises including the 5 concepts under the Outdoor Living Brands family of brands.

33social has strong experience in the home services industry and also serves clients in many other diverse industries.

See how 33social can help you achieve your digital marketing goals? Watch it now...

To learn more about 33social Read...

Telephone and Virtual Phone VoIP

RingCentral

With RingCentral, you can view recent and historic call volume from the new Call Center and use the incoming call notifications to bring up customer records with a click or start adding a new contact with the phone number already filled in.

Screen pop-ups occur when calls come through. If the caller ID matches a contact, we'll display an alert so you can click to bring up the customer record. If it doesn't match any contacts, it'll give you a prompt to start adding a new contact with that number filled in.

We also log the call history and have reporting to show call volume and to tie calls to users. Once you're connected, you'll see a "Call Center" menu pick under Administration which has some initial reporting.

We also have "click to call" from the contact and appointment details pages (clicking on the phone numbers).

Connecting with RingCentral

- To connect your RingCentral account to serviceminder.io, go to Control Panel > Integrations > Other
- Select the Connect button for RingCentral.
- You'll be prompted to log in to RingCentral and approve the connection.

Note: RC incoming call notifications happen on the Web, not the mobile app. RingCentral is not integrated with your mobile/cell phone provider. Dial from the app just uses your cell phone provider, so if you click the hyperlink on the phone number in the contact record on the app it will open cell call just like if you were dialing it from your phone.

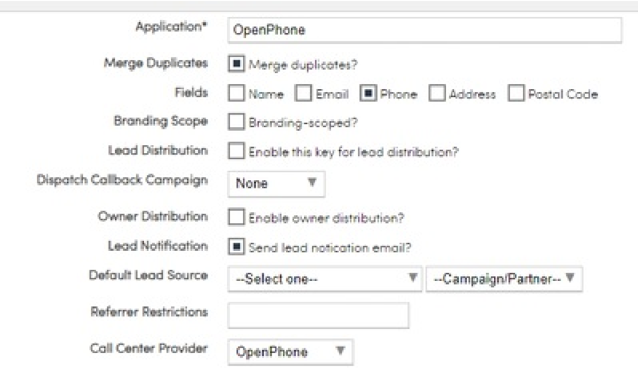
Vonage

service**minder**'s Vonage integration brings call data/incoming calls right into serviceminder.

> To connect your Vonage account to service**minder**, just go to Control Panel>Integations>Other and click "Connect" under Vonage.

OpenPhone

In Control Panel > API Keys, create a key to use for OpenPhone.

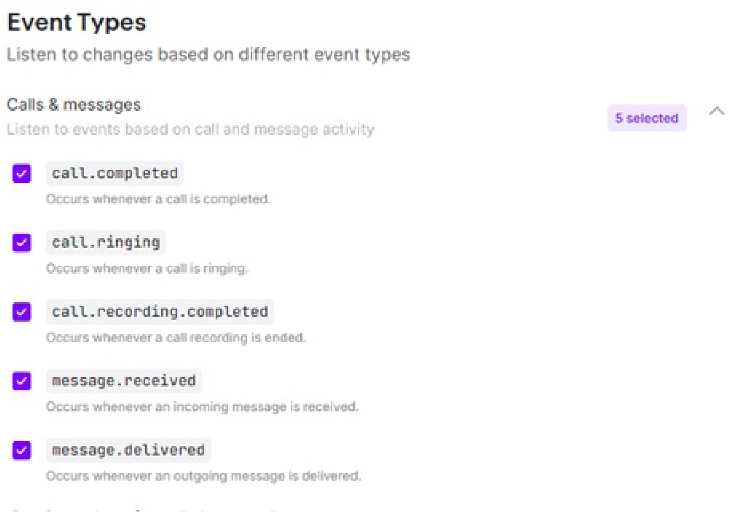


You can name your key, configure your settings, and be sure to select OpenPhone as the Call Center Provider.

Then in your OpenPhone account, under Settings > Webhooks, you'll create a webhook using our custom url: https://serviceminder.io/webhook/openphone/*{api_key}*

Replace with your unique key created in Control Panel.

Select the events you'd like to pass over to SM and save.



The event notifications and loggings are:

- When a call comes in on your OpenPhone number, you'll receive a banner notification in your service**minder** account; this will say it either matches an existing contact or asks if you'd like to create a new contact if it is an unmatched number.

- When a text message is sent or received by a contact's number, a note will be added onto their contact details.
- For calls, in Call Center you can see a record of inbound and outbound calls.

Voice for Pros

Our family of brands includes Voice for Pest, Voice for Pros, and Voice for Turf all under Affiliated Technology Solutions. We design and implement unparalleled integrated voice solutions for any size business from coast to coast.

Our integrations and advanced features have led us into many vertical markets, making us the only provider to offer specific phone solutions for the Pest, Lawn, and Home Services industries.

Click here for more info

CompanyCam

Overview

CompanyCam is an app that lets you take pictures and video and group them together in Projects. By integrating service**minder** with CompanyCam, you can seamlessly sync photos to appointments in our system.

Once you've connected your accounts, new content is sent over to service**minder** by looking at the user who created the content and finding in-progress appointments nearby to attach the content to.

If no appointment is found, service**minder** looks for any contact that is nearby, and will use that. If the project was created from the service**minder** side (see under Settings below), the content will be applied to the correct contact/appointment based on the project rather than the coordinates.

> Note that we only store a link to the videos (not a copy), so if you cancel or close your CompanyCam account, you will lose access to the videos from within service**minder**.

Video Tutorial

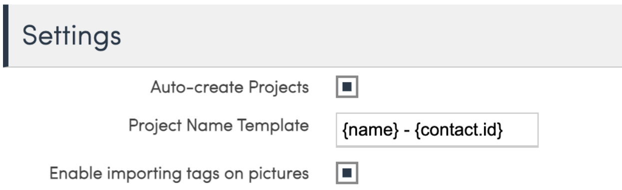
Your browser does not support HTML5 video.

Settings and Navigation

Connecting the Accounts

- To connect to your CompanyCam account, click through to **Control Panel > Integrations > Other > Connect to CompanyCam**
- Once you click this, you'll be prompted to log into CompanyCam to allow the two accounts to talk to each other.
- Next, you'll see a **Settings** link. Visit this page to turn on CompanyCam project creation as well as define how you want the projects named.
    - If Auto-project Creation is enabled, we'll either look for or create a project when you start an appointment. From then on, CompanyCam will prompt you to put content in that Project when you're near that location.

- You can use any contact shortcodes to set up the template name including address, name, etc. The example below uses the shortcode {name} - {contact.id} which will name the project with the contacts name and unique service**minder** contact ID (i.e., John Smith - 12345)



It is our recommended method to enable projects to auto-create and use a project name template for the most consistency when taking photos in CompanyCam and syncing them with service**minder** because it gives the technician a clear place to take the photos in CompanyCam and tells the service**minder** system exactly where to put them when they sync over.

Matching Up Users

CompanyCam and service**minder** users both have email addresses associated with them. This is what we use for additional validation and linking of CompanyCam activity into service**minder**. If you have CompanyCam users taking pictures or videos, the email address for those users should match the email address for the same users in service**minder**. This is used to enable us to link the content to the correct appointments and for auditing purposes.

Syncing Photos and Video

For the best success when taking photos in CompanyCam during an appointment and syncing them to service**minder** follow these steps:

1. Make sure the appointment has been **started** in service**minder**.

2. Use the Project in CompanyCam that was auto-created by the integration.

3. Take/Upload *all* photos and videos while the appointment is still in progress, and then finish the appointment in service**minder** like normal.

The most common reason that photos do not sync over to service**minder** from CompanyCam is that the appointment has not yet been started or has already been completed. This ends the "live" connection for CompanyCam to know it needs to send the photos over to our system.

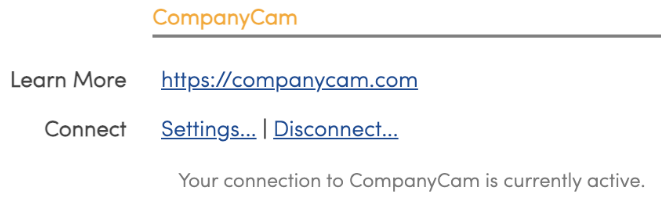
If the photos do not sync over while the appointment is in progress, the best option is to manually upload them to the service**minder** system at a later time.

FAQs

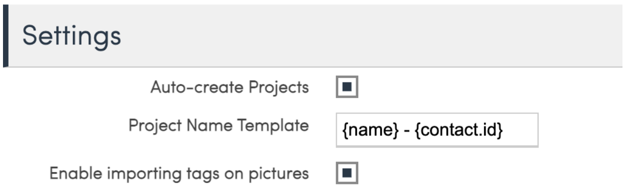
Why aren't my pictures syncing over from CompanyCam?

Review this checklist to set yourself up for success!

- My integration is active in **Control Panel > Integrations > Other**



- I have projects set to auto create in Company Cam by clicking on **Settings...**



- I have **started the appointment** and taken/uploaded all photos to the CompanyCam project while the appointment is **in progress**
    - Anything added before the appointment is started or after the appointment is finished will have to be downloaded from CompanyCam and manually uploaded into service**minder**

How can my customers see the photos in the contact portal?

Contacts can view the photos from an appointment via an Appointment Report link that will populate next to the applicable appointment. To generate an Appointment Report, you will need to set up a template in **Control Panel > Miscellaneous Templates > Appointment Report.**

Rallio and Revv

One of the hardest challenges with staying engaged as a brand on social media is generating content. **Rallio** simplifies social media management by integrating with serviceminder, allowing you to quickly upload and share photos of your work from Lightbox for easy editing and promotion, making it faster and easier to showcase your business.

Don't Have Rallio? Visit rallio.com and request a demo!

Setting Up Your Integration

1. Create a Rallio account.

2. Email **support@rallio.com** and tell them you want to add service**minder**.com to your account

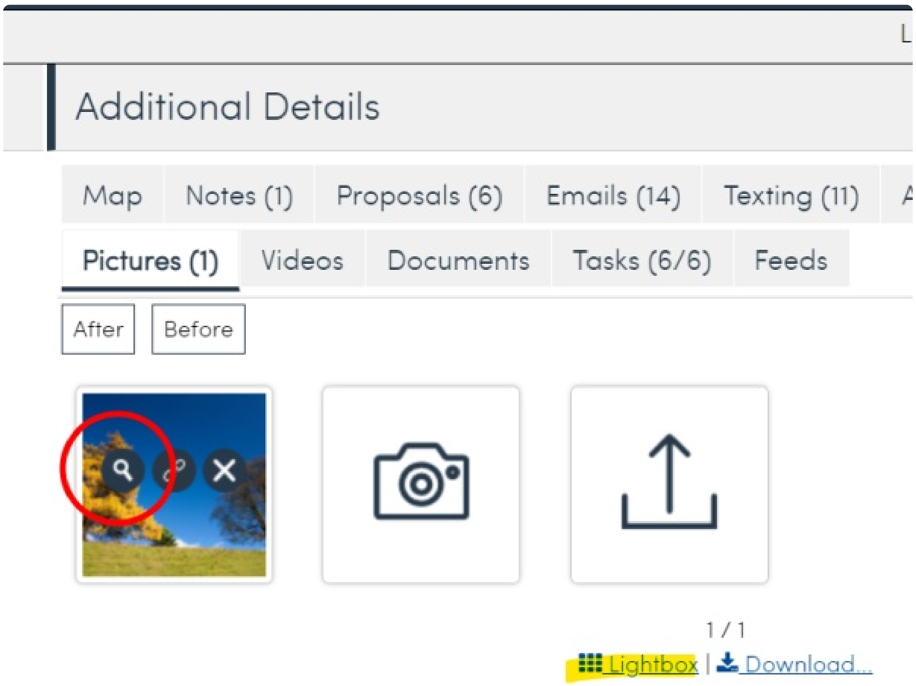
3. Once confirmed, go to **Control Panel > Integrations** and enter your **Rallio login email**.

> Note: Only one **Rallio** account/email can be connected per service**minder** account.

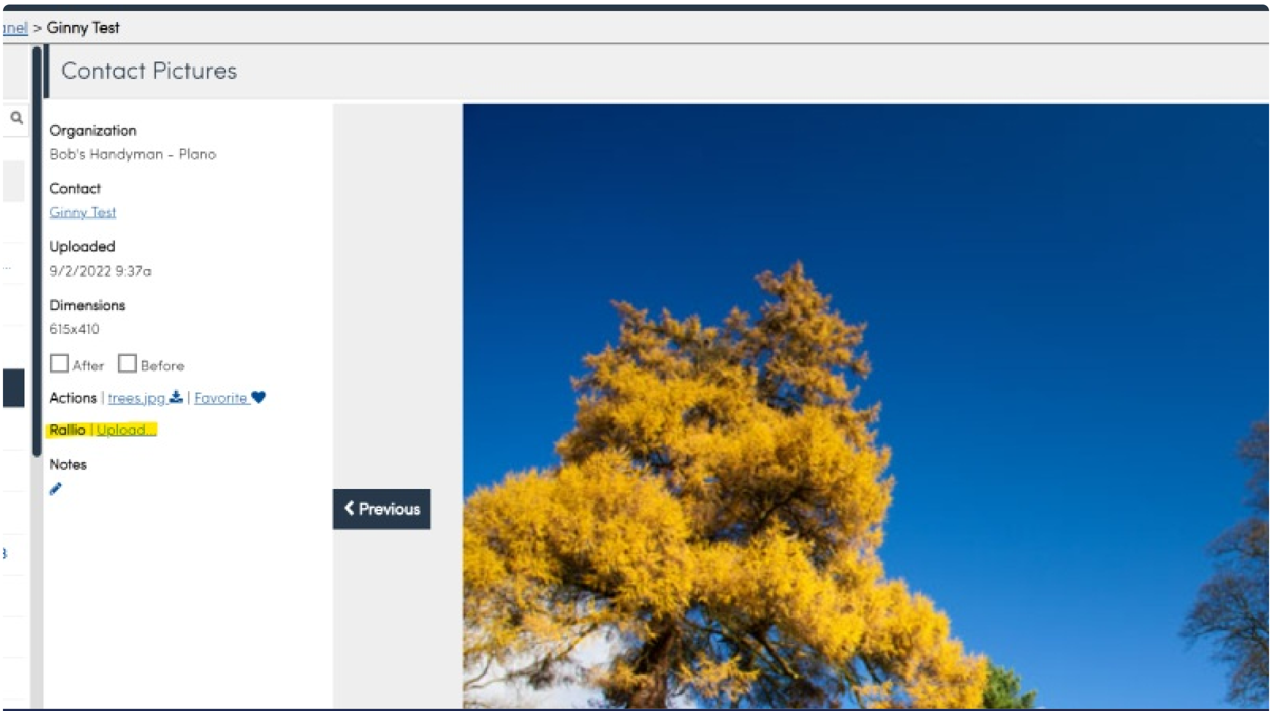
Using Rallio

Photos don't automatically sync to Rallio, so you don't have to worry about photos uploading that shouldn't. You select which photos you'd like to upload.

After uploading photos to service**minder** (i.e., to a contact, proposal, appointment, etc), you can view those in **Lightbox** and upload them to **Rallio**.



Contact details page > Additional Details section > Pictures tab
Click the magnifying glass on your photo to open it in Lightbox.
Or use the Lightbox link to view all photos.



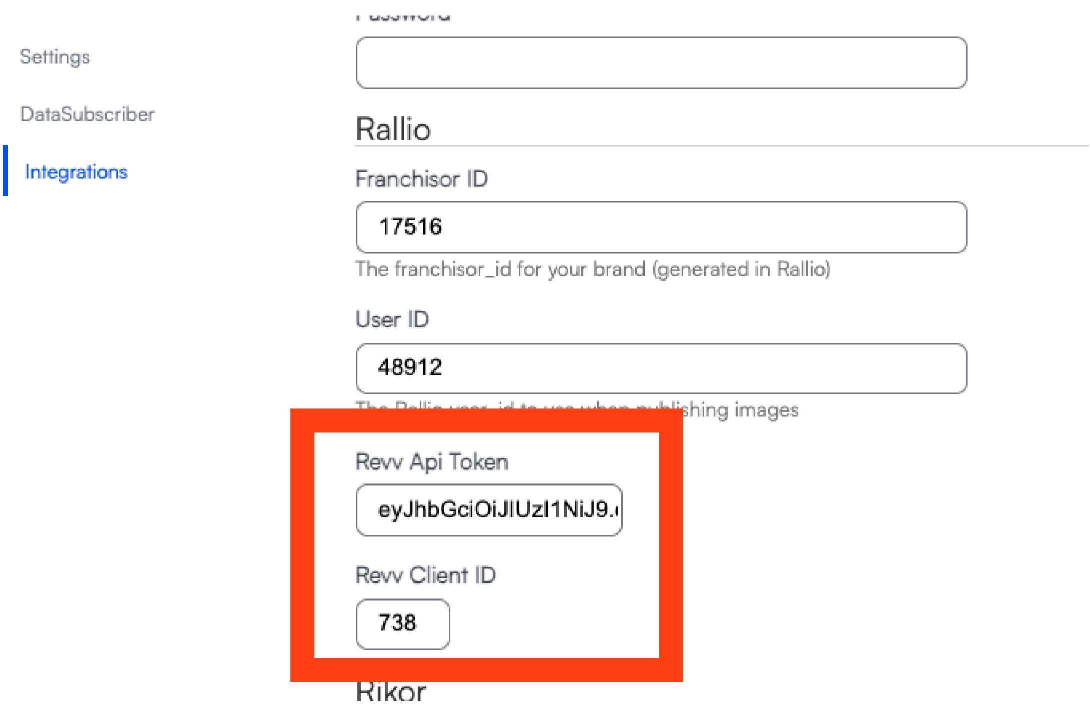
Click **Upload** on any photos you'd like to push into **Rallio**. Now they're available for quick editing and sharing!

Revv

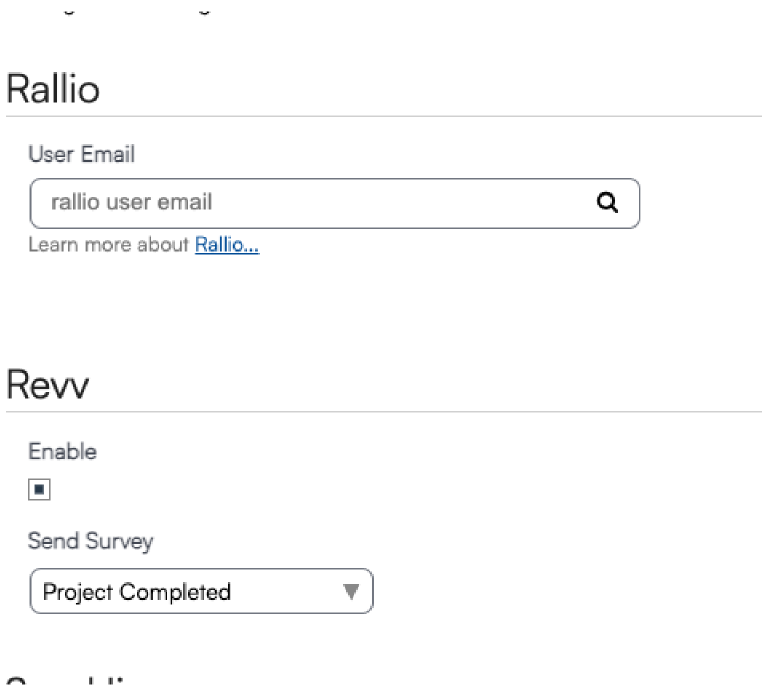
If your brand also uses Revv, which is the survey feature of Rallio then there is an easy way to integrate that into your service**minder** account and have specific triggers for when the survey sends.

At the brand-level, you need to turn on and connect Rallio. There are additional fields for Revv that need to be filled out.

A brand admin needs to go to **Dashboard > Tools** tab **> Configuration** and fill out the below fields. You can find this in the Integrations section of the page. Both the **Revv API Token** and the **Revv Client ID** can be found in your Rallio account.

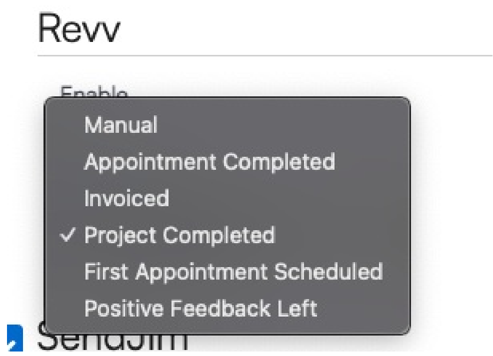


Then a brand admin or the franchisee can go to **Control Panel > Integrations > Marketing** tab. You need to fill out the Rallio section (if not filled out already) then the Revv section. The Revv portion fields only appear if the brand has set up the Revv connection.



The **Enabled** checkbox will default to on. If you uncheck that box, this connection will be severed and surveys will no longer be connected to your SM org.

You will need to choose between the **Send Survey** triggers provided.



After completing this step. The brand needs to test and be sure things are flowing as they should.

HouseAccount

The Digital Accelerator for Leading Home Service Brands

HouseAccount is the first-of-its-kind digital platform that empowers leading home service providers to offer a seamless, end-to-end customer experience. Our white-label solution integrates directly with ServiceMinder, enabling your customers to manage all their home service needs through a single, intuitive interface.

Learn more here...

Key Features:

- Appointment Scheduling: Customers can easily book, reschedule, and manage appointments from their desktop or mobile device.
- Service Management: Customers can upgrade existing services, add new offerings, and receive personalized notifications about their account.
- Billing and Payments: Customers can view invoices, make payments, and leave tips - all within the HouseAccount platform.
- Ratings and Reviews: Customers can provide feedback on their service experience, helping you identify areas for improvement.

The HouseAccount Platform delivers tangible benefits for your business:

- Increased Revenue per Customer: Make it easy for customers to add new services and increase their overall spend.
- Improved Customer Retention: Provide a frictionless digital experience that keeps customers engaged and loyal.
- Enhanced Operations Efficiency: Streamline back-office workflows and administrative tasks.
- Partner with HouseAccount to elevate your customer experience and drive sustainable growth for your home services business.

QuickBooks Desktop

Overview

> Note that QuickBooks Desktop support is depriecated. The methods detailed here may or may not work. QuickBooks does not provide any support for importing IIF files into QuickBooks Desktop.

> If you are using QuickBooks Desktop, we recommend either migrating to QuickBooks Online or looking at TransactionPro importer below.

This process will let you download invoices from service**minder** and then import them into QuickBooks.

1. Go to Reports and then click on the Downloads tab.

2. Click the "Download Transactions" button to download invoices for importing to QuickBooks Desktop

3. You have two options:

   Check the box "New Transactions Only" - this option is handy if your invoices are not generated in a linear time sequence. Or select the date range you want to pull (Invoices from … through)

4. You have two options of file format, IIF or TransactionPro. We highly recommend TransactionPro. Loading them directly as IIF files means you'll have to apply payment to each as well. TransactionPro tool you can buy from QuickBooks that will load the invoices and payments and apply the payments to invoices.

IIF File

The file will be in a .zip format and contain the customers.iif file and invoices.iif file. You may import both of these into QuickBooks. You can skip the customers.iif file and load just the invoices.iif file if you only need to load the billing address info along with the invoice details.

Open the .zip file and drag and drop both files onto your desktop, or someplace where you'll remember them. Then run QuickBooks.

Make a backup of your company file in QuickBooks. If there are any mapping issues, restoring from this backup will be the easiest way to "undo" the IIF file import.

In QuickBooks, select File > Utilities > Import and then select the customers.iif file first. When that is complete, repeat the process and select the invoices.iif file. Finally, you can load in the payments.iif file.

Common Issues

The Name field in service**minder**.io must match up with the Name field in QuickBooks. That is what QuickBooks will use to determine whether you are adding new customers or updating existing customers. You will need to use the same formatting convention in both applications -- e.g., last name comma first name or first name last name.

The parts and services that you have in service**minder**.io must also exist in QuickBooks. During the import, QuickBooks will attempt to add any items that don't exist. If you have Income Account information configured in service**minder** then QuickBooks will use that information to create the items and associate them with the correct accounts. Note that if the account(s) do not exist, QuickBooks will create them as bank accounts.

Provided that the items already exist in QuickBooks, the Income Account information is not needed. Note also that if you have Account Numbers turned on in QuickBooks, the Income Account values in service**minder** need to not include those numbers. Only the Account Name portion should be present.

Classes

You can use Classes to organize transactions into other groupings. You can apply an Accounting Class to contacts, services and parts. When invoices are sent over to QuickBooks, the Class will be set to the name of the Accounting Class. The Accounting Class is determined by searching the Parts first for any related class. If no parts have a class, then the Service is checked. If the service doesn't have a class, then the invoice's contact is checked. If no class is found, then the Class will be empty in QuickBooks.

Because you can associate Accounting Classes with contacts, you can get all invoices for a given contact (or group of contacts) to all have the same class for QuickBooks reporting purposes.

TransactionPro File

Transaction Pro Importer for QuickBooks Desktop. For more information on how the importer tool works to go to this link.

Other Handy Integrations

AirAdvice

AirAdvice enables contractors to quantify indoor air quality (IAQ) health, comfort, and safety issues in the home, and present equipment solutions to homeowners. With our integration, appointments in your serviceminder account can link to the report generated in AirAdvice.

Getting Started:

1. Create an org-level API key in service**minder** and enter it in AirAdvice.

2. **Configure service agents** in AirAdvice—when a report is completed, it will match the report to the appointment assigned to that agent.

Encircle

Encircle provides field service teams with easy-to-use documentation tools, including photo, video, and signature capture, as well as professional PDF report generation. This is especially useful for restoration work with moisture tracking and content inventories.

Learn More...

Setting Up:

- Go to **Control Panel > Integrations > Other tab**.

- Enter your **Bearer Token** in the Encircle section and hit Save.

- You can now create an Encircle inspection or claim from service**minder** on the web or mobile app.
- Any pictures or documents captured in Encircle will automatically sync back to serviceminder.

Rikor

Rikor Insurance Consultancy provides digital insurance brokerage services, managing your franchise's insurance compliance program. Protect your franchise, protect your brand.

Webinar

Blog Post

Website

Zapier

Overview

To set up a webhook so you can send leads from Zapier to service**minder**, first create an API key (**Control Panel > API Keys**). Be sure to set how you want to handle duplicates. You can set a default channel/campaign for the API key but we also support accepting channel and campaign information in the webhook payload.

This integration also supports lead distribution so if you're capturing data for all organizations in your brand, you can still use the Zapier integration to send the leads to the correct locations.

Zapier Webhooks is a premium feature so you will need to have a paid Zapier account that includes webhooks to use this integration.

About Webhooks

This page has more detailed information on Zapier's webhooks capabilites.

https://zapier.com/help/create/code-webhooks/send-webhooks-in-zaps

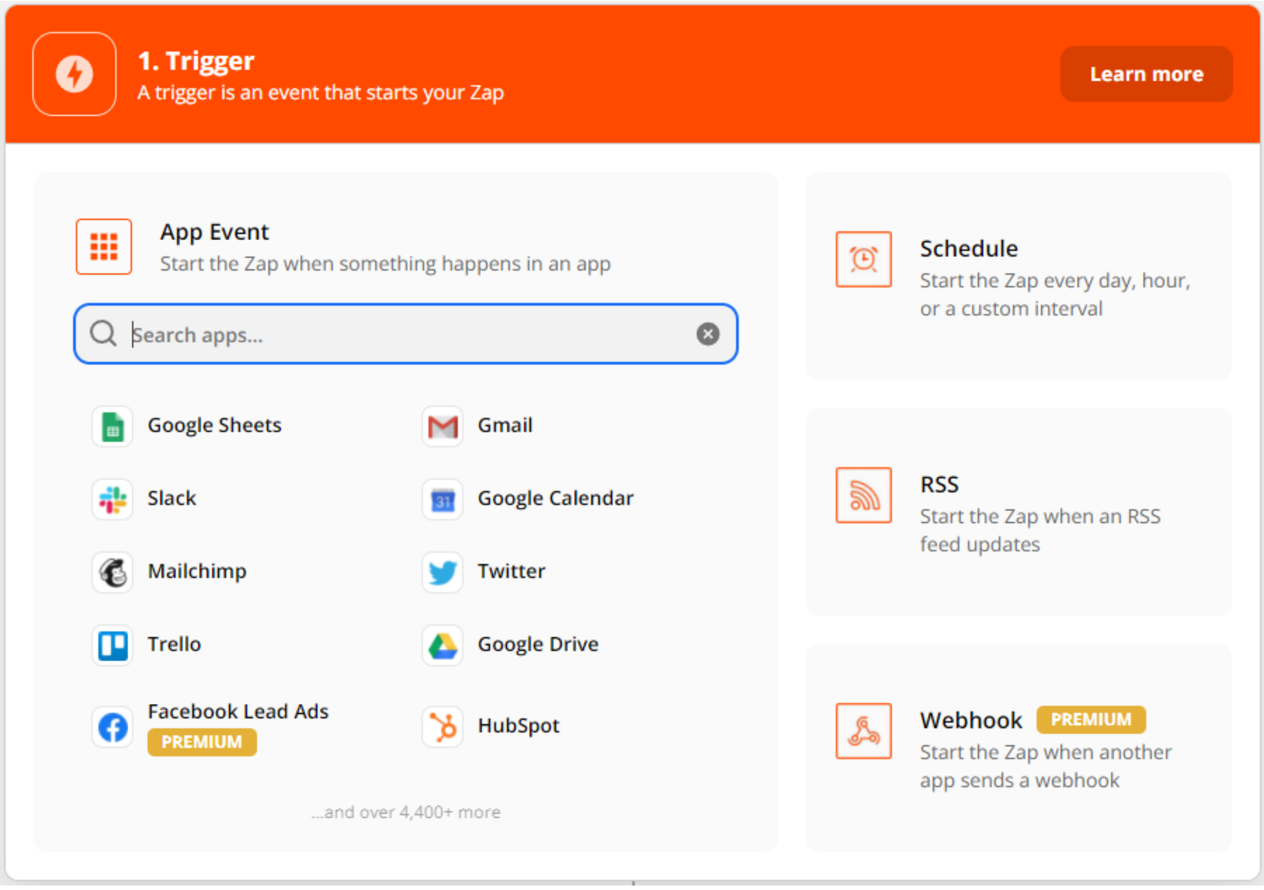
At a high level, service**minder**.io supports HTTP POST operations in JSON format.

Setup

Log in to Zapier and choose to add a new Zap. Then follow these steps to create your zap to catch the data from the other application and send it to service**minder**.io. For our example, we're going to show how to do this with a Facebook Lead Capture Ad.

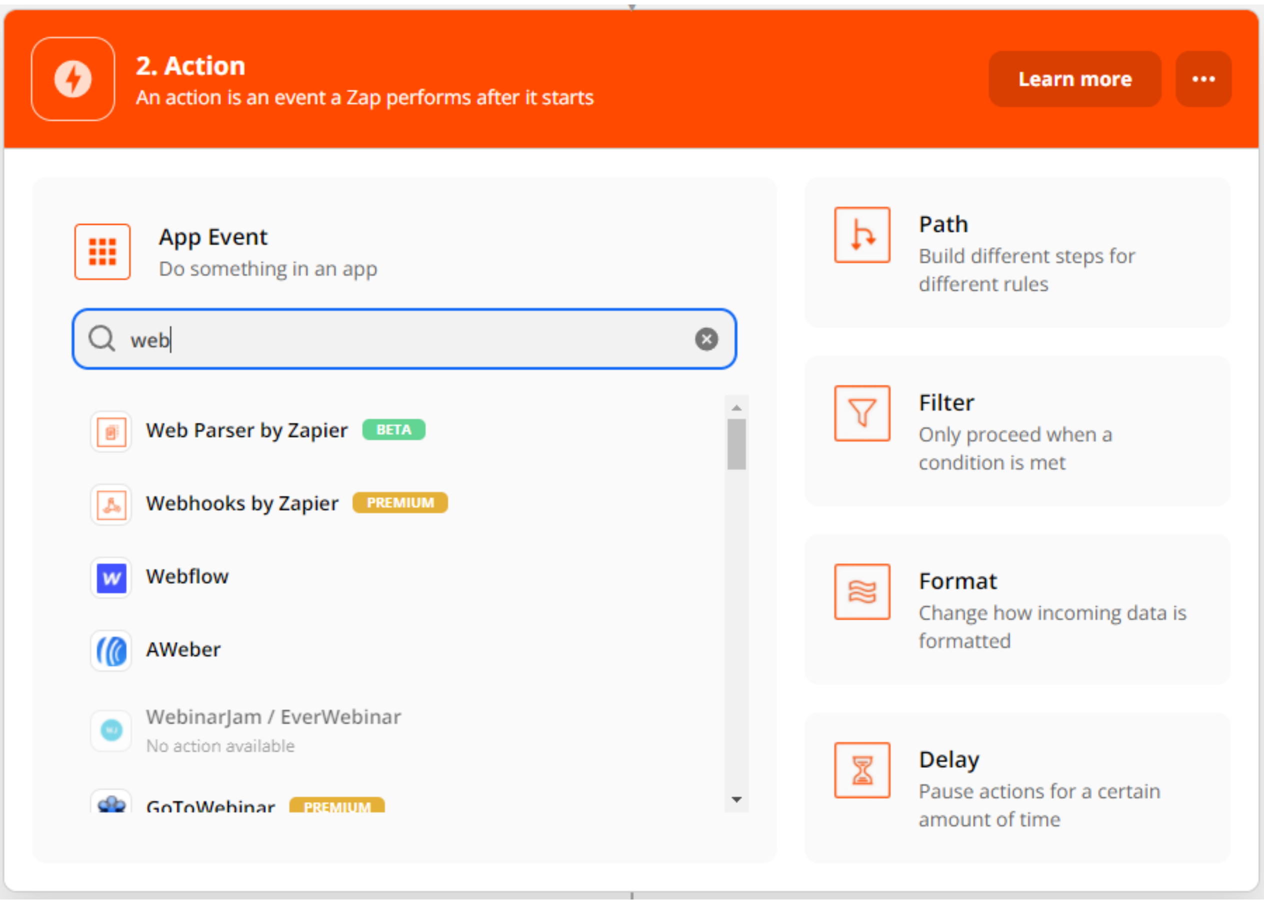
1. Choose Trigger

Choose where the lead is coming from. For example, you might choose to trigger for a new Facebook lead. You'll need to connect Zapier to your Facebook account, choose the correct page and select which form.

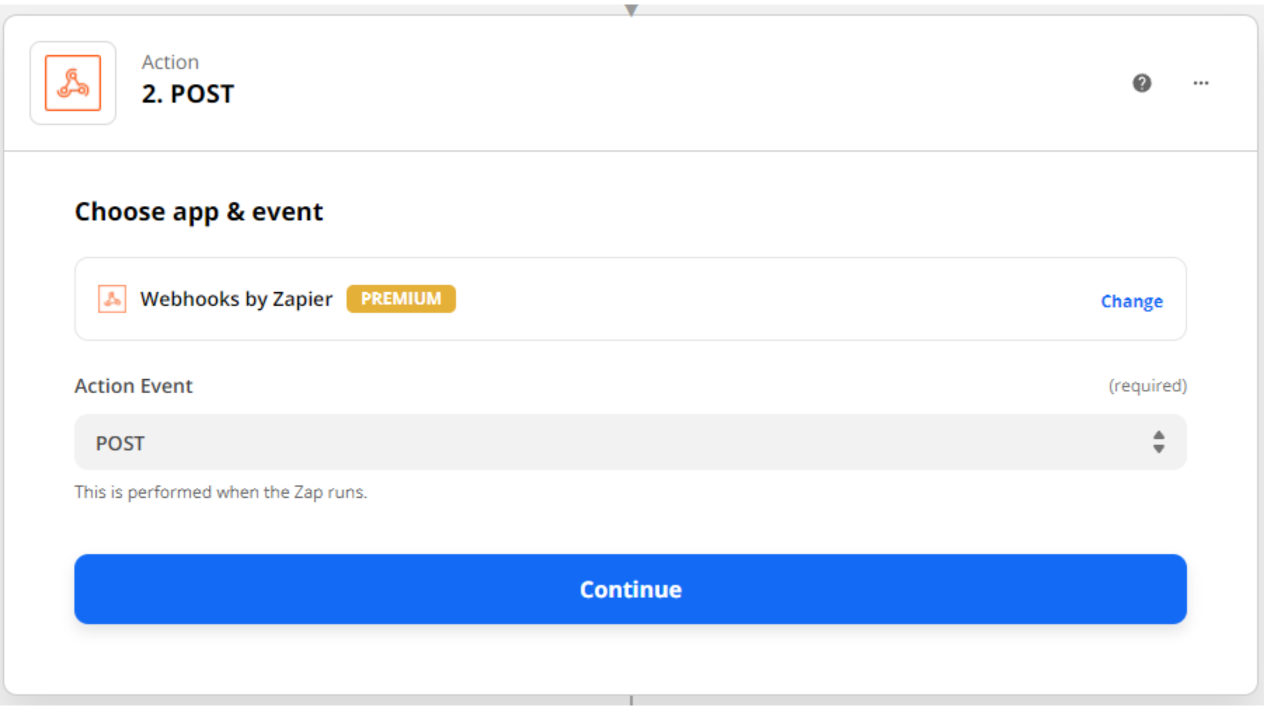


2. Choose Action

Search for "Webhooks by Zapier" and select that option.

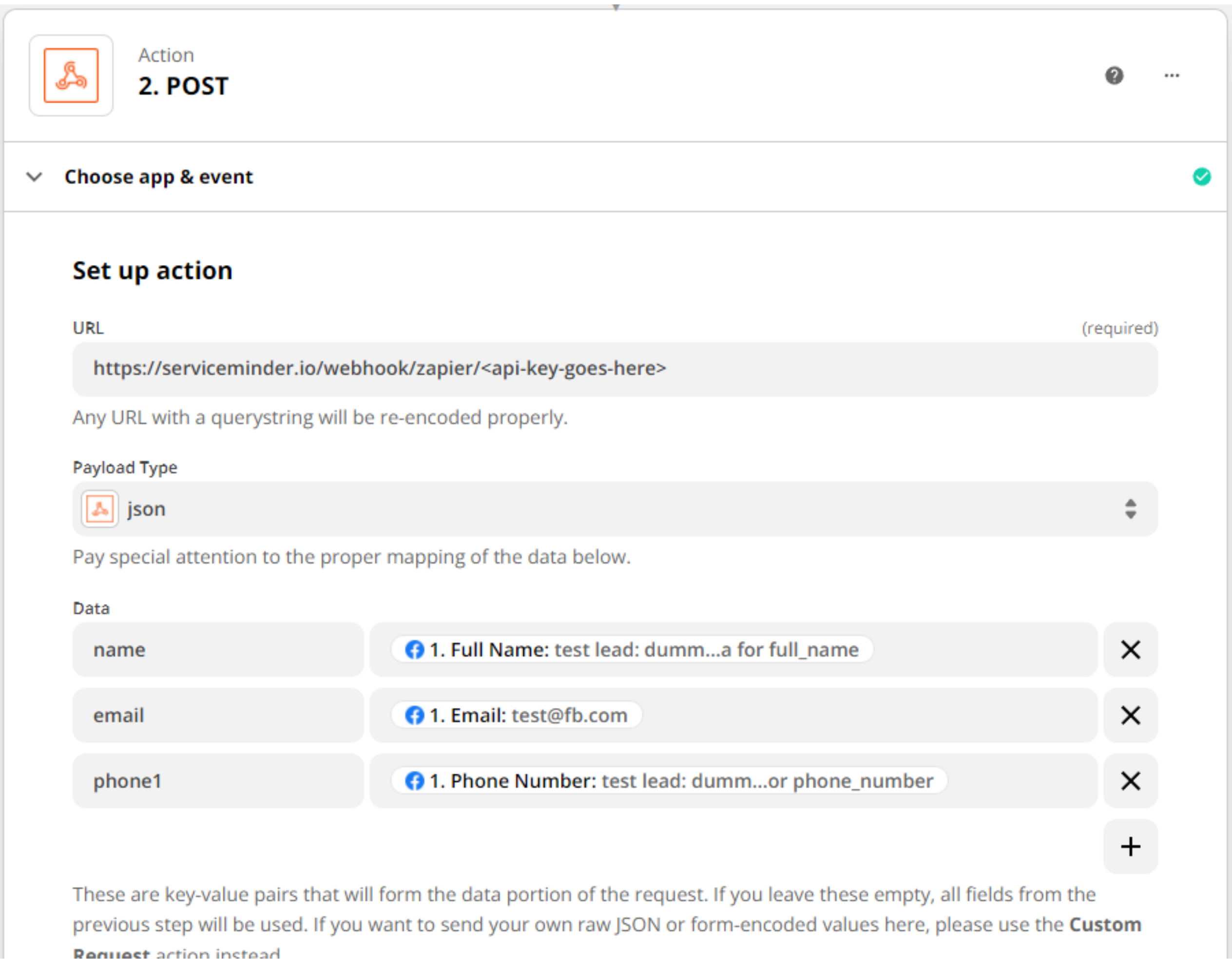


3. Choose POST as the Type



4. Set Up your Action

Put in the URL for the webhook, making sure your API key is on the end. Set the Payload Type to json. Then add all of the fields. We *do* support Custom Fields in this integration. The first input is the name of the field in service**minder**.io. Refer to the previous page for the names of the fields. The right hand side is where you pick what fields from your form to map.



5. Test, then Save

Confirm that your screen matches these settings (except for any specific fields you're mapping) and select Test and Continue. You should get the test lead data into your service**minder**.io account pretty quickly. Then name and save this Zap. That's all there is to it.

Test action

Skip Test

Send Request to Webhooks by Zapier

To test Webhooks by Zapier, we need to create a new request. This is what will be created:

Search request data...

URL: https://serviceminder.io/webhook/zapier/<api-key-goes-here>
Payload Type: json
Data:
- **name:** test lead: dummy data for full_name
- **email:** test@fb.com
- **phone1:** test lead: dummy data for phone_number

Wrap Request In Array: no
File:
Unflatten: yes
Basic Auth:
Headers:

EMPTY FIELDS:

File: empty (optional)
Basic Auth: empty (optional)
Headers: empty (optional)

Test & Review

Test & Continue