# **Collateral Library and Lightbox**

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## Overview

The **Collateral Library** is a place to store images and documents in service**minder** that you might use frequently. Think of it like Google Drive, but within the service**minder** system.

**Lightbox** is a place to review all photos that have been uploaded to the service**minder** system by users within your organization or brand.

# **Collateral Library**

The Collateral Library is accessed differently depending on who is logged in.

• At the Brand level, it is accessed via **Dashboard>Tools** and anything uploaded will be available for all franchisees to use, but not edit.



• At the Organization level, it is accessed via the **Control Panel**. Anything uploaded here is only visible for that organization to use and edit.

Messaging/Templates



## Adding Items to the Collateral Library

To upload a new document or image, you click on the plus sign at the end of the library and select the file you would like to upload.

Colendar > Control Panel			
Navigation	Collateral Library		
Search Q	Picture deleted		
Bob's Handyman - Plano	Your Library		
Bob's Handyman Austin	George Council C		
Bob's Maids - Plano	Search Q		
Not-A-Business LLC	Active Active Only?		
serviceminder.com			
Shortcuts			
Add a Contact			
Schedule an Appointment			
My Schedule	2622-4/		

### Using Items from the Collateral Library

When editing an email template, choose the image icon then select the folder icon to browse images in your Collateral Library.



On Proposals and Invoices, you can add items from the Collateral Library as attachments. This can be found at the bottom of the page.



# Lightbox

The **Lightbox** is a centralized gallery of all photos uploaded into **ServiceMinder (SM)**, including those attached to contacts and other records.

- Each organization's Lightbox contains all photos ever taken or uploaded within that specific organization.
- The **brand level Lightbox** is accessible from the **Dashboard** and allows Brand Admins to **view and filter all images** for branding purposes.



## Accessing the Lightbox

#### **For Organizations**

Organizations can view all uploaded photos at the org level.

- The quickest way to access the Lightbox is via the At a Glance page.
  - 1. Select At a Glance from the Snapshots menu (left side of the screen).
  - 2. Click **View** next to the picture count to open the gallery.

RECENT PICTURES	
273	
	View

#### **For Individual Contacts**

To view photos associated with a specific contact:

- 1. Open the **Contact Details** page.
- 2. Scroll to the Additional Details section.
- 3. Click on the **Pictures** tab.
- 4. Select the Lightbox link below the photos to view the full gallery.



# FAQs

#### Can I add attachments to emails I send out?

While you cannot directly attach a file to an email, you can use the Collateral Library to send files via link. When viewing the document in the Collateral Library, there is an option to copy a URL that leads to the document. This can be pasted in any communication to contacts.

