Collateral Library and Lightbox

12/11/2025 2:54 pm CST

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.

> This article will review:
> - Collateral Library
> - Lightbox
> - FAQs

Collateral Library

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

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

Settings | serviceminder.io

Configuration View and modify your brand's configuration options.	**Roles** Manage the Roles for your brand.
Revenue Categories Revenue categories help group service revenue for royalty and performance tracking.	
Regions Manage the regions for your organizations.	**Tags** Manage organization tags.
Collateral Library Upload brand specific images and documents.	

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

Control Panel

Messaging/Templates

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Notifications Choose which emails serviceminder sends out and other related options.	**Automated Emails** Edit the email messages that serviceminder sends out automatically.
Ad Hoc Emails Edit the email templates that you can use to send individual emails to contacts.	
Automated Text/Voice Edit the text and voice notification templates that serviceminder sends out.	**Collateral Library** Upload images and documents for use in your proposals and emails.
Print Templates Edit the letters and forms that serviceminder generates.	

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.
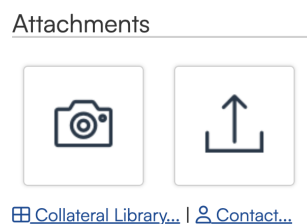

Using Items from the Collateral Library

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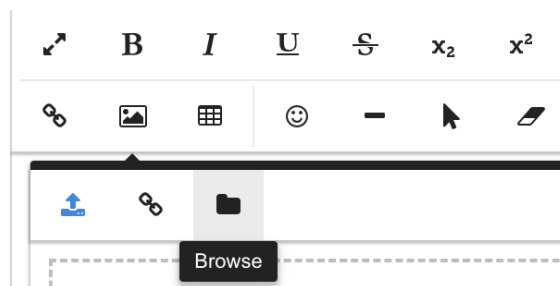

On **Proposals** and **Invoices**, you can add items from the **Collateral Library** as attachments. This can be found at the bottom of the page.

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.
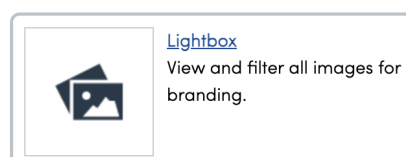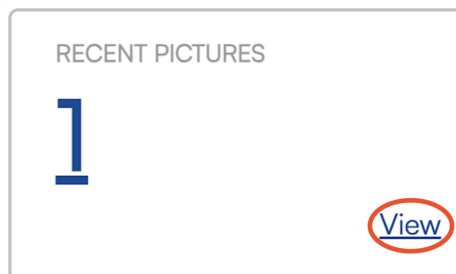

Accessing the Lightbox

For Organizations

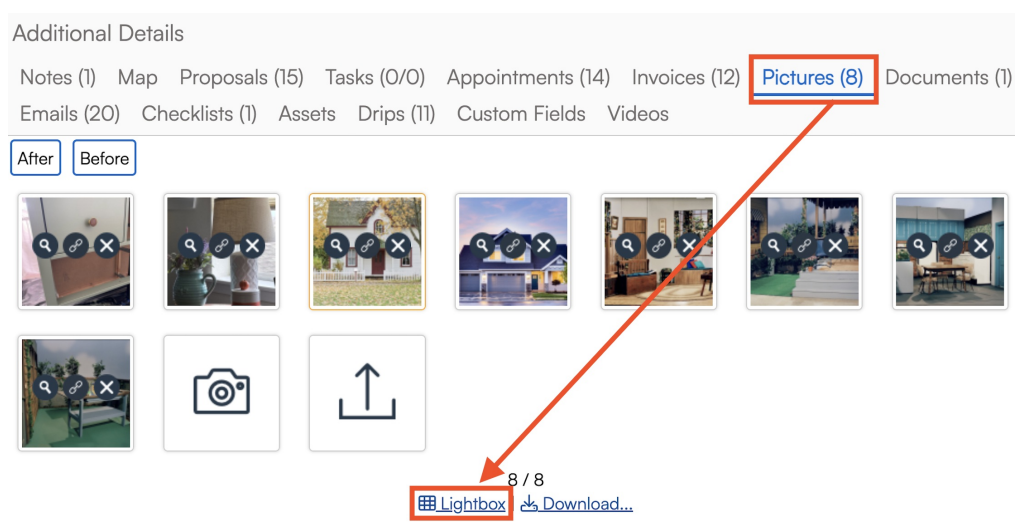Organizations can view all uploaded photos at the org level.

- The quickest way to access the Lightbox is via the **At a Glance** page.

     1. Select **At a Glance** from the **Snapshots** section of the navigation menu.

     2. Click **View** next to the picture count to open the gallery.

RECENT PICTURES

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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.

Additional Details

Notes (1) Map Proposals (15) Tasks (0/0) Appointments (14) Invoices (12) Pictures (8) Documents (1)

Emails (20) Checklists (1) Assets Drips (11) Custom Fields Videos

After Before

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⊞ Lightbox ⬇ Download...

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.

Copy URL

2693.pdf