Mobile App FAQs

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Overview

Have a question about the new ServiceMinder mobile app? Use the sections below to find quick answers about moving from ServiceMinder Classic, navigating the app, working appointments, payments, offline access, and more.

This article will review:

Note: The features and options you see may vary based on your device and operating system, app version, user permissions, and your organization's configuration.

Moving from ServiceMinder Classic

Is the new ServiceMinder app an update to ServiceMinder Classic?

No. The new ServiceMinder app is a separate application, so you'll need to download it from the Apple App Store or Google Play rather than waiting for ServiceMinder Classic to update.

When both apps are available, look for **ServiceMinder** for the new app and **ServiceMinder Classic** for the previous app.

Can I have ServiceMinder and ServiceMinder Classic installed at the same time?

Yes. Both apps can be installed and used during the transition period. You don't have to uninstall

ServiceMinder Classic before trying the new app.

Which app should I use?

We recommend using the new **ServiceMinder** app as much as possible so you can get comfortable with the new workflows and take advantage of improvements such as offline appointment work, background uploads, updated scheduling tools, and the new Billing experience.

ServiceMinder Classic will remain available during the transition, so you can still use it when needed while your team moves over.

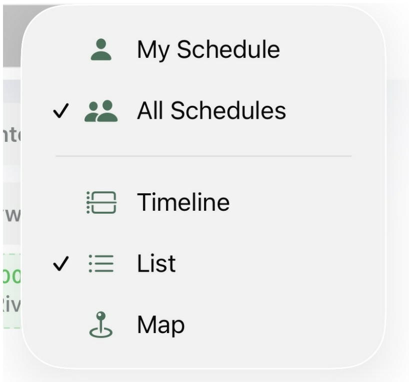
When will ServiceMinder Classic go away?

ServiceMinder Classic is planned to be retired in 2027. It will remain available during the transition period, and we'll provide additional notice before it is no longer supported or available.

Schedule & Team View

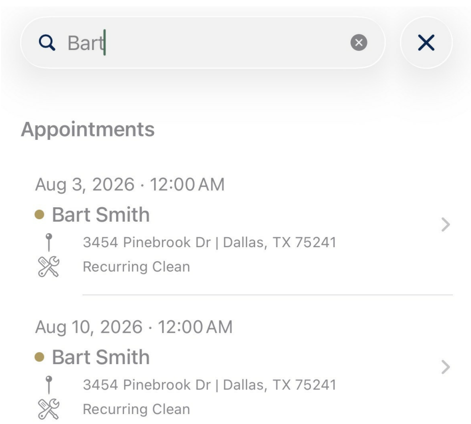
How do I switch between my own schedule and the team's?

Open **Schedule** and tap the **eye icon**. Choose **My Schedule** to see your own appointments or **All Schedules** to see the team.



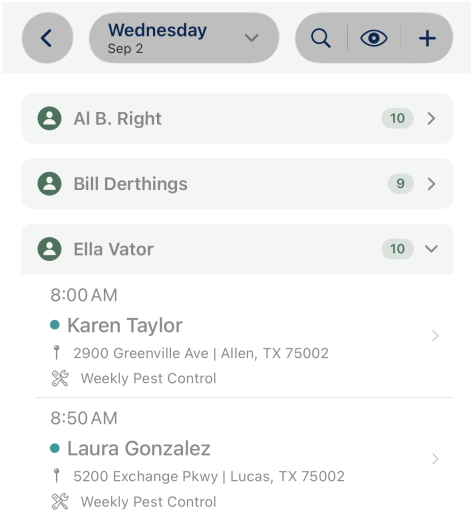
How do I find a specific appointment?

From the team schedule, tap the **magnifying glass**. You can search by contact name, appointment address, or service name.



In Team View, how do I focus on just one person?

Tap a Service Agent's name to collapse or expand their appointments. Collapsing the Service Agents you don't need can make a busy team schedule much easier to scan.



I don't see any appointments on my timeline. Is something wrong?

Not necessarily. The Timeline only shows appointments scheduled for the selected day. Tap the date in the upper-left corner to choose another day, or switch to **List** view to browse upcoming appointments.

Appointments

What does the En Route button do?

It sends the En Route notification configured for that appointment. Depending on the appointment setup, that may be an email, text, or call to the customer. After you tap it, a confirmation appears on the appointment to let you know the notification was sent.

Can I open an appointment from the Load Out screen?

No. Load Out is a read-only summary of the services and parts needed across your scheduled work for the day. To work an individual appointment, open it from **Schedule**.

I can't find a way to add an additional Service Agent when creating an appointment. Did I miss it?

Choose the appointment's time and primary Service Agent first. Once those are selected, the option to add additional Service Agents becomes available. You can also add or change them later by editing the appointment.

What's the difference between Edit, Transfer, Reschedule, Requeue, and Carry Over?

- **Edit** when you need to change the appointment itself, such as its line items, notes, custom fields, customer notes, or other details.
- **Transfer** to assign it to another Service Agent
- **Reschedule** to move it to another date or time,
- **Requeue** to remove its Service Agent and scheduled time and return it to the queue
- **Carry Over** when unfinished work needs an additional appointment.

Contacts

Can I sort or filter my contacts—for example, by most recently added?

Yes. From **Contacts**, you can sort by name, recently added, recently updated, or next appointment. You can also filter the list using options such as category, tags, lead source, or whether the contact has an upcoming appointment.

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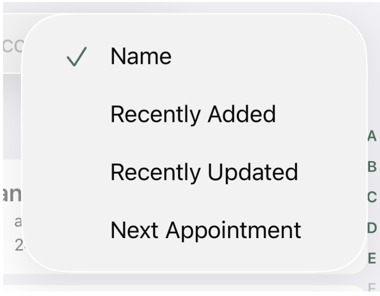

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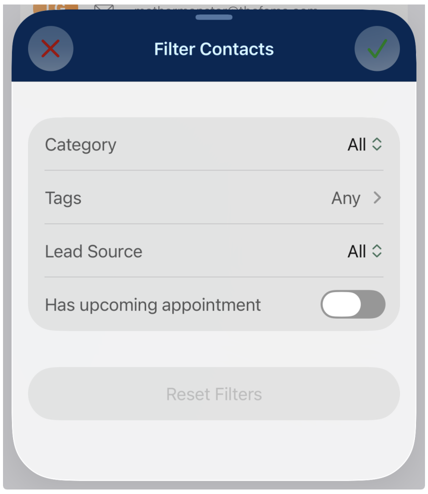

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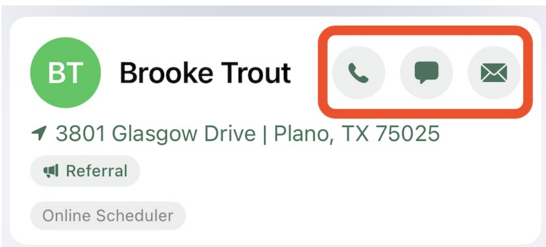
Can I add tags to a contact from the app?

Yes. Open the contact and select **Edit Contact**. You can manage the contact's tags in the **Classification** section.

Can I call, text, or email a customer from their contact?

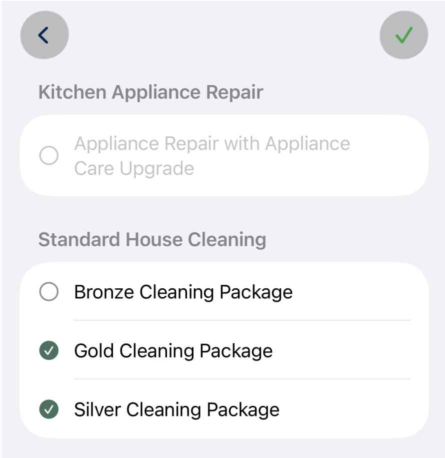
Yes. Communication actions are available directly from the contact record, including **Call, Text,** and **Email**.



Proposals & Invoices

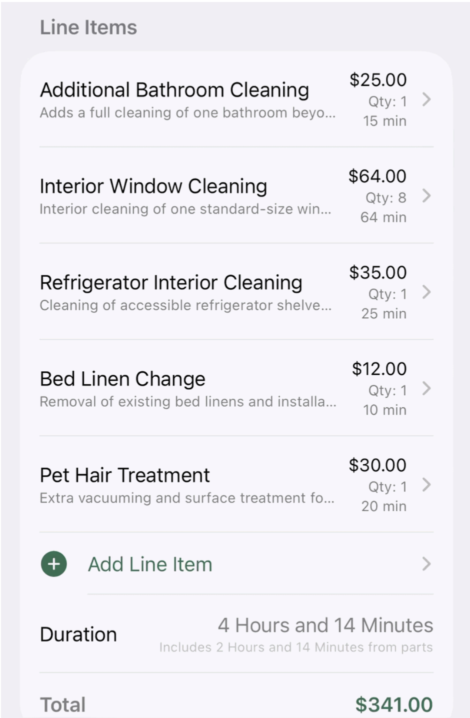
Can I use more than one template when creating a proposal?

Yes, as long as the templates use the **same service**. Select multiple applicable templates and their line items will combine rather than replacing the items you've already added.



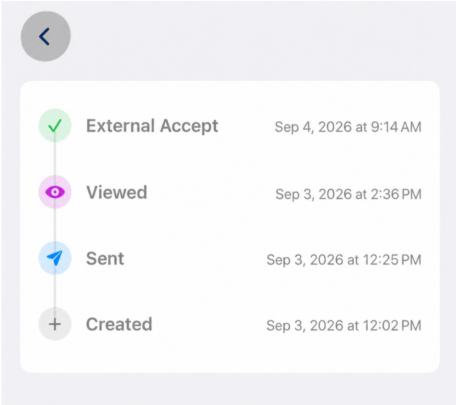
How do I remove a service or part from a proposal or invoice?

Swipe left on the line item to delete it. This works on both create and edit forms.



Can I tell whether the customer has viewed or accepted a proposal?

Yes. Open the proposal to review its activity history, including events such as when it was created, sent, viewed, and accepted.



How do I turn a proposal into an invoice?

Open the proposal and tap **Invoice**. You can choose to invoice the**full amount, a percentage, or a flat amount** smaller than the proposal total, then use the green check mark to generate the invoice.

Why didn't finishing an appointment create an invoice?

Invoice creation depends on how the service is configured. Many appointments automatically generate an invoice when you complete the Finish Info and tap **Submit**, but some services are configured to invoice manually or at another point in the workflow. An appointment with no billable amount may also finish without creating a new invoice.

Learn more about invoicing settings.

Payments & Billing

Where is the At a Glance report?

At a Glance isn't a separate screen in the new app. The**Billing** tab now brings together information previously found across At a Glance, Pulse, proposals, invoices, and other billing areas.

Why don't I see the Billing tab?

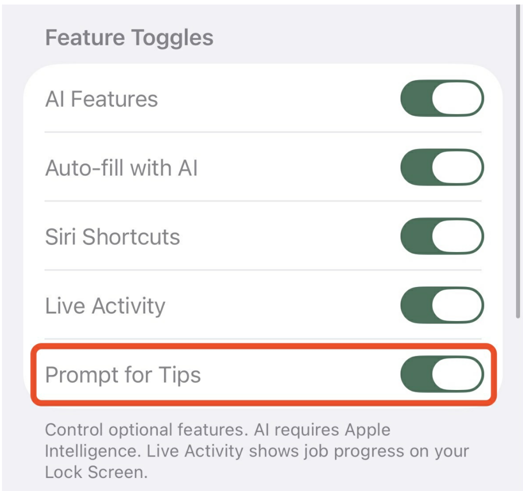
Access to Billing depends on your user permissions. If you don't see it, ask your owner or brand administrator to review your permissions.

Can I take a payment without a cell signal?

It depends on the method of payment. Supported offline appointment workflows support manually recording payments including cash, check, or any other custom payment method your organization has configured. Credit card and ACH processing require internet connection.

Is tipping supported when I take payment in the field?

Yes. When tipping is enabled for your organization, the customer can choose a preset tip or enter their own amount as part of invoice payment. Tipping can be enabled under **More > Feature Toggles > Prompt for Tips**.



Working Offline

I completed an appointment offline. Did my work save?

Supported appointment actions are stored on your device and queued to sync when connectivity returns. Once you're back online, open the appointment and confirm that the expected status, notes, photos, and other information have finished syncing.

Some information isn't available while I'm offline.

ServiceMinder can only show information that was already available on your device before the connection was lost. If the appointment or information hadn't been loaded yet, you'll need to reconnect before the app can retrieve it. We recommend opening the app each morning before starting your route if you expect to be in low-connectivity areas.

My changes haven't synced yet.

Make sure you have a stable connection and give ServiceMinder time to work through anything waiting to sync. After an extended offline period, photos and other larger uploads may take longer than smaller updates.

I'm about to work somewhere I know has no service. What should I do?

Open ServiceMinder while you still have a reliable connection and review your schedule before leaving. This gives the app an opportunity to prepare the appointment information you'll need in the field. Data will load for today's and tomorrow's appointments.

What happens if something fails to sync?

If a queued action can't sync, ServiceMinder displays a notification pointing you to the affected appointment. Tap the notification to open that appointment and review what needs attention.

Photos & Media

How many photos can I add at once?

You can capture up to **10 photos at a time** using the in-app camera.

When selecting existing photos from your phone's library, the number you can choose at once is based on your organization's **App Gallery Upload Limit** under **Control Panel > Scheduling**. This setting defaults to **5 photos** but can be increased up to **30**.

Do I have to keep the app open while photos upload?

No. Photos upload in the background, so you can continue elsewhere in ServiceMinder or switch to another app while the upload finishes.

Why haven't my photos appeared for someone in the office yet?

If you were recently in an area with weak or no service or uploaded several photos, they may still be waiting to upload. Give ServiceMinder time to reconnect.

How do I save photos taken through ServiceMinder to my phone too?

Go to **More > Preferences** and turn on **Save Photos to Gallery**. Photos taken through ServiceMinder will then also be saved to your device.

Why can't I take or select photos?

Check what ServiceMinder is allowed to access in your phone's **Settings**. ServiceMinder needs access to your **Camera** to take new photos and access to your **Photos** to select images already saved on your device.

Communication

Why don't I see the En Route action?

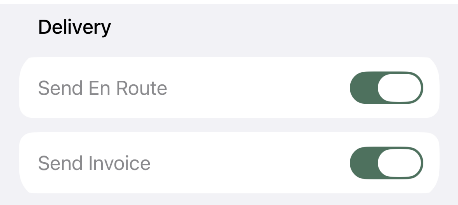
The actions shown on an appointment depend on its current phase and what actions are available at that point in the workflow.

What's the difference between En Route notifications and Two-Way Texting?

En Route is tied to an appointment and lets the customer know you're on the way. **Two-Way Texting** is an optional messaging service for ongoing customer conversations and includes the Texting Hub for receiving and responding to replies.

Do I have to tap En Route before every appointment?

You send **En Route** directly from an appointment when you're ready to notify that customer. When you finish an appointment, the Finish sheet also includes a toggle that lets you send **En Route** to your next appointment as part of wrapping up the current job. It isn't completely automatic—you can choose whether to send it.

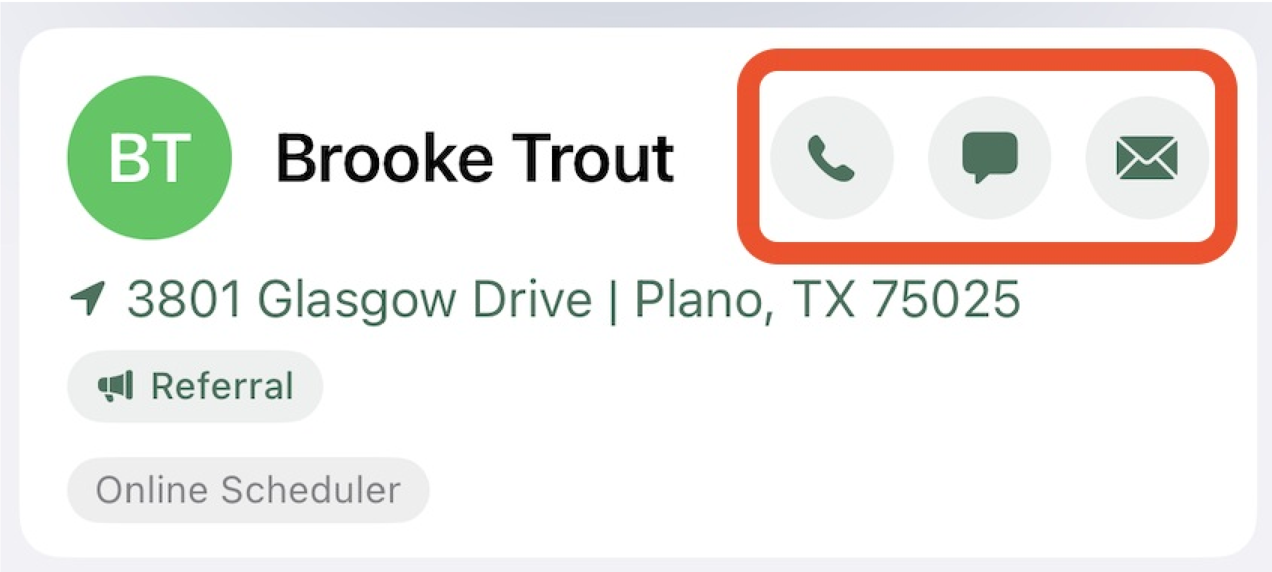


I don't see Texting in the mobile app.

Two-Way Texting must be configured for your organization, and your access may depend on your permissions. When available, open it from **More > App Features > Texting**.

Can I contact a customer without opening their full contact record?

Yes. Appointments include **Call, Text,** and **Email** actions. Proposals and invoices also provide**Call** and **Email** options.



A customer says they stopped receiving our texts.

They may have opted out of Two-Way Texting. Check the conversation and customer information first. If they've opted out, they will need to opt back in before Two-Way Texting messages can resume.

AI Features

Why don't I see the AI features?

AI availability depends on the device you're using. The rest of ServiceMinder can still be used normally if your device doesn't support the optional AI features. Current device guidance identifies newer supported hardware for these capabilities.

Do ServiceMinder's AI features need an internet connection?

Supported AI features are designed to run on the device, allowing them to work even without a connection. This includes tools such as Appointment Briefing, Note Polish, and note summarization on supported devices.

Organizations & Settings

My schedule, invoices, or proposals suddenly look empty or wrong. Is something broken?

Check which **organization** you're currently viewing. If you have access to multiple organizations, open **More** and use the organization selector to make sure you're in the one you expect.

How do I switch between organizations?

If you belong to multiple organizations, the current organization appears at the top of the **More** section. Use the drop-down to switch without signing out.

Where do I change app preferences?

Go to **More > Preferences** for device-level options such as your preferred navigation app and whether ServiceMinder photos should also be saved to your phone.

Where do I go if I need help with the mobile app?

Open **More > Support**. From there, you can submit a support ticket and submit app diagnostics when you're troubleshooting an app issue.

Does the app support Spanish, and how do I switch languages?

Yes. ServiceMinder follows your device's language setting rather than using a separate language selector inside the app. Change your phone's system language to Spanish and reopen ServiceMinder.