

A New Experience for Your Customers

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Overview

ServiceMinder's customer-facing pages have been refreshed to create a cleaner, more consistent experience throughout the customer journey.

The updated pages make important information easier to review and key actions easier to complete, whether a customer is scheduling service, approving a proposal, preparing for an appointment, or paying an invoice.

For your business, that means a more polished customer experience that can help build trust, reduce confusion, and remove friction from important moments like booking, approving work, and completing payment.

This article will review:

- What's New?
- Which Pages Have Changed?
- How Do I Make the Switch?

What's New?

Your brand, front and center.

Customer-facing pages use your brand's primary and secondary colors directly from your ServiceMinder configuration. Those colors are carried consistently across proposals, invoices, the Online Scheduler, statements, and more.

Your logo, your colors, your customer experience.

A cleaner, more consistent experience.

Customer-facing pages now share a cleaner visual design, more structured layouts, and easier-to-read typography across desktop and mobile devices.

Because the pages now follow the same design system, customers get a more consistent experience as they move from one interaction to the next — from scheduling an appointment to reviewing a proposal and paying an invoice.

A smarter online scheduler.



The Online Scheduler has been redesigned to make booking easier for customers and give businesses more flexibility in what they offer online.

The new mobile-first, tab-based experience guides customers through booking step by step instead of presenting everything on one long page. Customers can also switch locations without restarting their booking, find the soonest available appointment more easily, and navigate between dates and time slots with less friction.

Businesses can now turn proposal templates into bookable packages with selectable options, add-ons, and upsells. Pricing can update automatically based on customer selections, quantities, or information collected during booking, such as square footage.

Payments are built directly into the booking experience as well, allowing customers to pay a deposit, pay in full, or save a card on file before completing their appointment.

Faster payment entry for your customers.

The payment panel now includes Google address autocomplete. As customers begin entering their billing address, matching addresses are suggested automatically.

That means less typing, fewer address-entry errors, and a faster path to completing payment.

Which Pages Have Changed?

Online Scheduler

The Online Scheduler includes some of the most significant updates to the customer-facing experience.

The redesigned, mobile-first booking flow walks customers through scheduling in clear steps and makes it easier to find and select an appointment time. Customers can jump to the soonest opening, browse available dates and time slots, and even switch locations during booking without starting over.

The updated scheduler also gives you more flexibility in what customers can book. Existing proposal templates can be offered as bookable packages with selectable options, add-ons, and upsells. Pricing can update as customers make selections, including quantity-based pricing and pricing driven by information collected through custom fields.

Customers can also pay a deposit, pay in full, or save a card on file as part of the booking process. Once the booking is complete, ServiceMinder automatically sends email and text confirmations.

Learn more about What's New in the Online Scheduler.

Proposals

The proposal experience has been refreshed with a cleaner layout, easier-to-read typography, and more consistent use of your brand colors.

Customers can more easily review and approve proposed work, while forms attached to proposals and

subcontractor bid pages now follow the same updated design.

Proposal

Acme Home Services Plano

1500 E Plano Pkwy
Plano, TX 75074
(972) 555-0199

Billing/Service Address

Amanda Anderson
2400 Eldorado Pkwy
Little Elm, TX 75068
(123) 656-8120

Date:

8/03/26

Total:

\$175.00

Expires:

11/01/26

Bronze Cleaning Package

Bronze Cleaning Package

A straightforward whole-home clean covering the essentials. Perfect for giving your home a fresh reset without the extras.

Total: \$175.00

Selected

Silver Cleaning Package

Silver Cleaning Package

A more thorough whole-home cleaning with extra attention given to some of the places that are easiest to put off.

Total: \$250.00

Select

Gold Cleaning Package

Gold Cleaning Package

Our most comprehensive cleaning package, combining a full-home clean with detailed extras for a top-to-bottom refresh.

Total: \$325.00

Select

Item	Description	Quantity	Unit Price	Amount
Standard House Cleaning	A straightforward whole-home clean covering the essentials. Perfect for giving your home a fresh reset without the extras.	1	0.00	\$175.00
Subtotal				\$175.00

Merchant

Acme Home Services Plano

Status

Open

Proposal Date

8/3/26

Total

\$175.00

Expires

11/1/26

Accept

Decline

Request changes

Invoices & Payments

The updated invoice experience has been redesigned to feel cleaner, more polished, and more trustworthy from the moment a customer opens an invoice through the final payment step. Your brand colors are carried throughout the experience, helping the page feel like a natural extension of your business rather than a separate third-party payment screen.

The payment panel also includes Google address autocomplete, helping customers enter billing information more quickly and accurately.

Together, these updates create a more professional payment experience that can help customers feel confident reviewing their invoice and completing payment.

Invoice

Bob's Handyman - Plano

3308 Preston Rd 350 232
Suite 350-232
Plano, TX 75093
(860) 786-4121
Lic # 56789PQR

Billing/Service Address

Brooke Trout
186 Fleet Street
Plano, TX 12345
(143) 143-1432

Invoice #:

8422

Issue Date:

1/09/25

Balance Due:

\$1,260.00

Item	Description	Area	Test Checkbox	Quantity	Unit Price	Amount
Barrier Spray - 2 Weeks	Lawn and foliage barrier spray service, every 2 weeks.			1 acres	0.00	\$1,260.00
Subtotal						\$1,260.00
Tax						\$0.00
Total						\$1,260.00
Amount Paid						\$0.00
Balance Due						\$1,260.00

Pay invoice

Merchant

Bob's Handyman - Plano

Invoice

8422

Status

Unpaid

Issue Date

1/9/25

Balance Due

\$1,260.00

Pay Invoice

Select a payment option:

☐ ACH (eCheck)

☒ Credit Card

☐ Financing

Card Number*

Card Number

Expiration Date*

mm/yyyy

CVC*

Name on Account*

Full name on card

Billing Address*

Address line 1

Forms

Customer-facing forms have been updated with the same refreshed design, whether they're attached to a proposal, invoice, or appointment.

Oven Repair Service Authorization

Acme Home Services Plano
1500 E Plano Pkwy
Plano, TX 75074
(972) 555-0199
bobsvideotutorials@gmail.com
<https://getserviceminder.com/>



Billing/Service Address

David Phillips
7600 Legacy Dr
Plano, TX 75024
(123) 501-1337 (Mobile)
david.phillips@serviceminder.co

Date

August 3, 2026

OVEN REPAIR SERVICE AUTHORIZATION

Thank you for choosing **Acme Home Services Plano**. Please review the information below and sign to authorize the requested oven repair service.

SERVICE DETAILS

Customer: David Phillips
Service Address: 7600 Legacy Dr | Plano, TX 75024
Service: Kitchen Appliance Repair

REQUESTED SERVICE

Diagnostic and repair service for common kitchen appliances such as refrigerators, dishwashers, ovens, ranges, and microwaves. Parts and major repairs are quoted separately when needed.

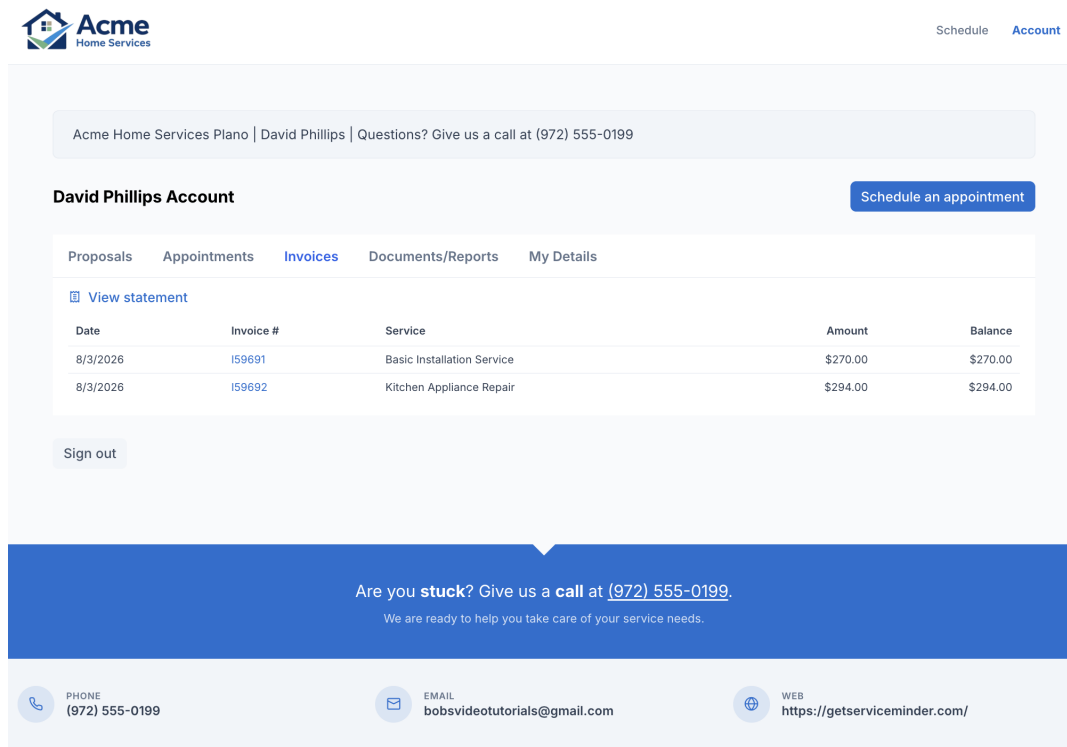
WORK AUTHORIZATION

I authorize **Acme Home Services Plano** to inspect, diagnose, and perform approved repairs to the oven or range at the service address listed above.

Account Pages

The customer account experience has been refreshed to give contacts a seamless, branded place to manage their relationship with your business beyond a single appointment or transaction.

When customers log in, they can review proposals, invoices, statements, and upcoming or past appointments within the same consistent experience. They can also take care of common account tasks, such as updating a card on file, changing or resetting their password, managing communication preferences, reviewing future appointment schedules, and accessing other contact-level actions.



Whether a customer is checking what's coming up, looking for a past invoice, or simply updating their account information, the experience now feels more connected and familiar from one task to the next.

The result is a more cohesive customer hub that makes everyday self-service easier while keeping your brand present throughout the experience.

Appointments

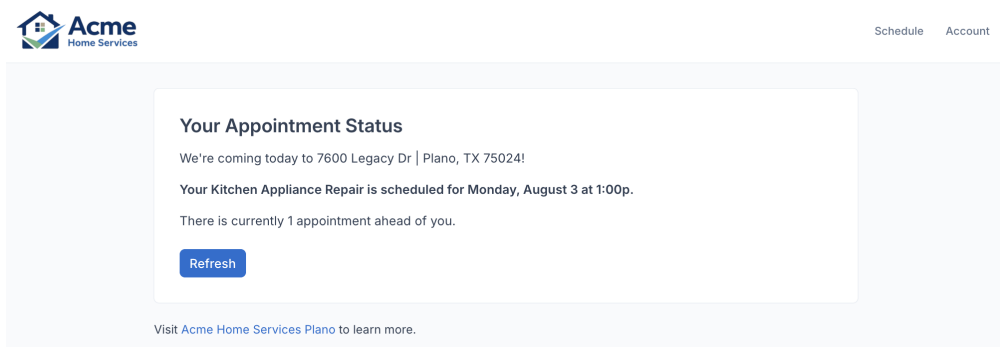
The customer-facing appointment experience has been refreshed from beginning to end, creating a more connected journey before, during, and after service.

From confirming an appointment and reviewing pre-appointment information to viewing post-appointment reports, providing feedback, or leaving a tip, customers move through each step within the same consistent, branded experience.

Forms, acknowledgments, communication preferences, and other appointment-related interactions have been updated as part of that journey as well.

The result is an experience that feels more seamless and intentional, rather than a series of

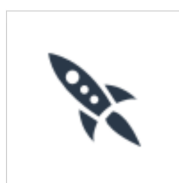
disconnected pages customers encounter along the way.



How Do I Make the Switch?

The Updated End Customer Experience can be enabled at either the **brand level** or the **individual organization level**, depending on your permissions.

The setting is managed from a new **Experience Settings** page.



[Experience Settings](#)

Turn the new customer experience on for your organization.

Brand Administrators

Brand Administrators can manage the experience for multiple organizations from the **Brand Experience Settings** page. You can access this page from either:

- **Dashboard > Tools > Experience Settings**
- **Control Panel > Experience Settings**

Both paths take you to the same Brand Experience Settings page.

Brand Experience Settings

✔ 5 of 65 locations are on the new customer experience.

Who gets the new customer experience?

☐ All locations in Bob's Handyman Service

This Brand-wide setting applies the new customer experience everywhere and overrides any individual organization(s) setting.

☐ Select all	5 of 65 on
☐ Bob's Handyman Service Plano	Classic
☐ Bob's Handyman Service Austin	Classic
☒ Bob's Handyman Service Houston	On
☐ Bob's Handyman Service Denver	Classic
☒ Bob's Handyman Service Seattle	On

At the top of the Experience Settings page, select **All locations in [Brand Name]**. When selected, the Updated End Customer Experience is enabled for every organization in your brand.

Who gets the new customer experience?

☐ All locations in Bob's Handyman Service

This Brand-wide setting applies the new customer experience everywhere and overrides any individual organization(s) setting.

Below the brand-wide option, you'll see a list of the individual organizations in your brand.

Select the checkbox next to any organization where you want to enable the Updated End Customer Experience. Use the search bar to find a specific location.

☐ Select all	5 of 65 on
☐ Bob's Handyman Service Plano	Classic
☐ Bob's Handyman Service Austin	Classic
☒ Bob's Handyman Service Houston	On
☐ Bob's Handyman Service Denver	Classic
☒ Bob's Handyman Service Seattle	On

You can turn it on for one organization, several organizations, or use the **All locations** option to enable it everywhere at once.



Tip: For a more consistent experience across your brand, consider enabling the new customer experience for all locations. Once enabled brand-wide, individual locations will no longer have the option to return to the classic experience.

Owners and Organization Administrators

Owners and Organization Administrators with access to Control Panel settings can enable the experience for their own organization.

Go to **Control Panel > Experience Settings**, then select **Enable Modern Customer Experience for [Organization Name]** and click **Save**.

The pages your customer sees, rebuilt. Same data, same links — faster and mobile-friendly.

☐ **Enable modern customer experience for Bob's Springfield**
Applies right away, even to links already sent. Turn off anytime.

check the box, then Save **Save**

Want a look first? Open a sample [invoice](#) or [proposal](#).

Before making the switch, you can preview the updated customer experience directly from this page. Next to **Want a look first?**, select **invoice** or **proposal** to open a sample and see what your customers will experience before you enable the setting.



Need to switch back? You can return an organization to the **Classic customer experience** at any time. Go back to **Experience Settings**, uncheck the box and click **Save**. If the brand-wide setting is enabled, a Brand Administrator will need to turn that off before an individual organization can return to Classic.