Mobile App Navigation Overview

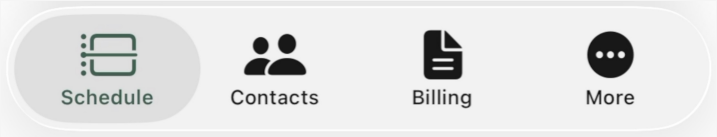
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Overview

The ServiceMinder app keeps the tools you use most often within easy reach while you're working in the field.

The main navigation is organized into four tabs at the bottom of the screen:

- Schedule - View and manage your appointments and workday.
- Contacts - Find customers and access their information.
- Billing - Review billing activity and items that may need attention.
- More - Access additional tools, settings, security, and help.



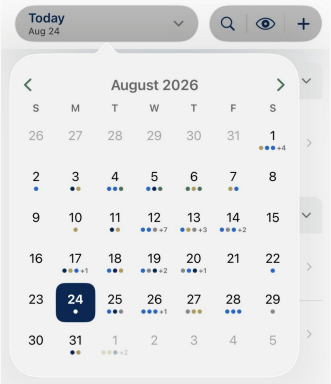
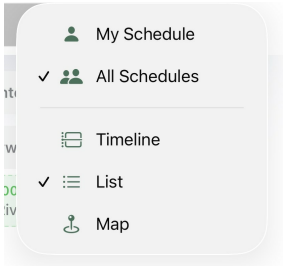
You'll also notice common Navigation Patterns Throughout the App.

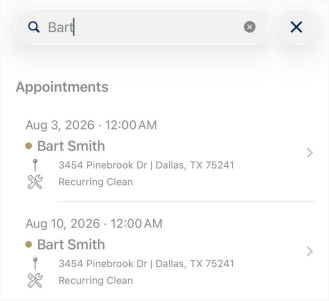
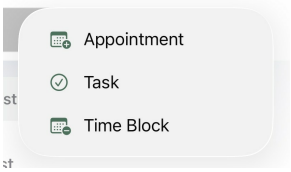
Note: The features and options you see in the ServiceMinder mobile app may vary based on your device and operating system, app version, user permissions, and your organization's configuration.

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Schedule

The **Schedule** tab opens to **My Schedule**, where you can view your appointments for the selected day.

What you want to do	Where to go	What it looks like
View another day	Tap **Today** in the upper-left corner and choose a date. Days with scheduled appointments are marked with a dot.	
Change whose schedule you see or how the schedule is displayed	Tap the **eye icon** and choose **My Schedule** or **All Schedules** to switch whose appointments you're viewing. Choose **Timeline**, **List**, or **Map** to change how the schedule is displayed (see below).	

What you want to do	Where to go	What it looks like
Find an appointment	From the team schedule, tap the **Magnifying Glass** to search appointments by contact name, appointment address, or service name.	
Add something to the schedule	Tap **+** to create an appointment, task, or time block.	

Choose the Schedule View That Works for You

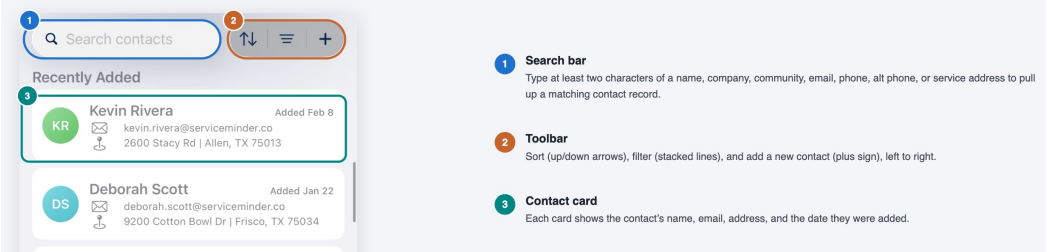
Each Schedule view presents your appointments a little differently, so you can choose the view that works best for what you're trying to do.

View	Best for
Timeline	Visualizing appointments across the day so you can quickly see when work is scheduled.
List	Viewing appointments in an agenda-style list. This can be especially helpful for busy schedules with lots of appointments.
Map	Seeing scheduled work geographically, including route information, traffic data, and drive time.

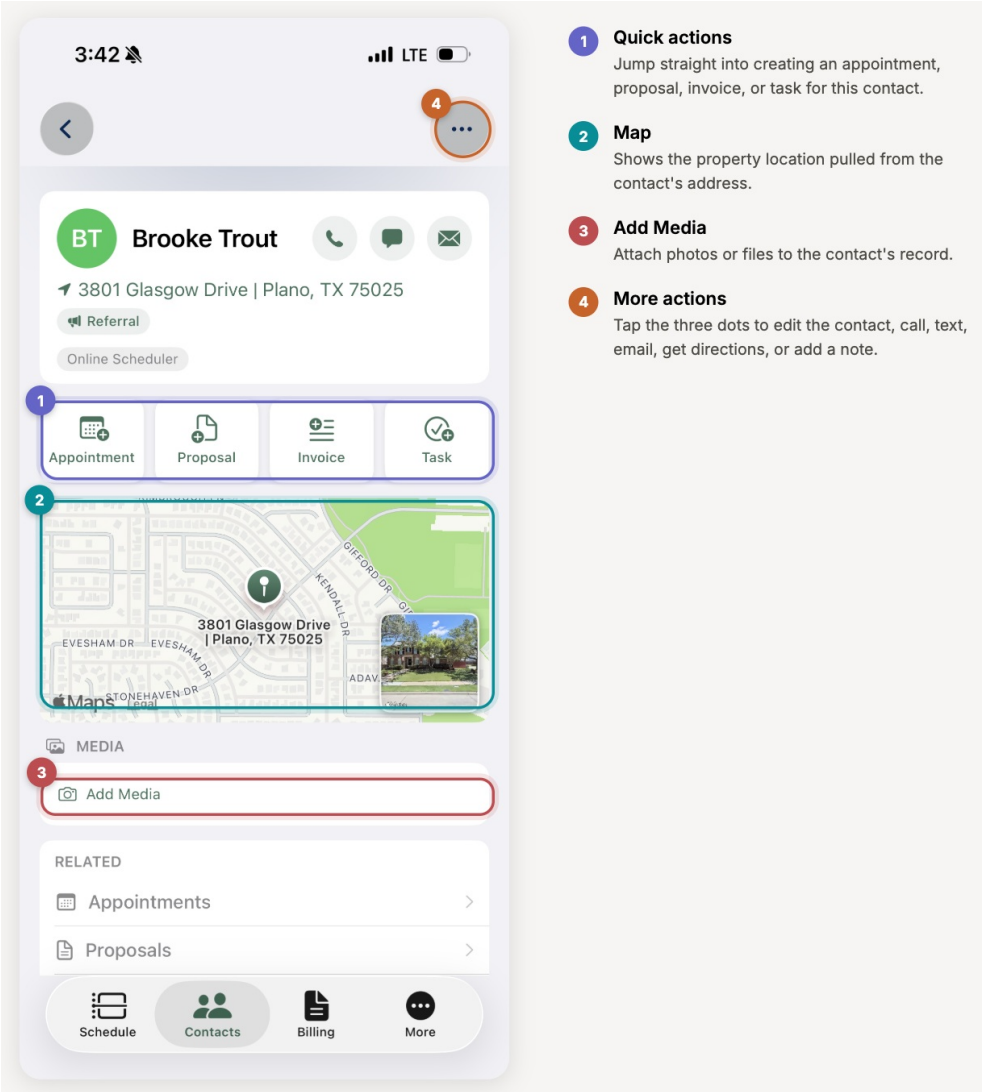
Tip: You can also long-press an appointment to access available quick actions without opening the appointment first. See **Mobile App Tips and Tricks** for more ways to use long press throughout the app.

Contacts

The **Contacts** tab gives you quick access to customer and contact information.



Select a contact to open their detail page, where you can quickly get the context you need before or during a job. From one place, you can review the customer's address, location, internal notes, and media, as well as their related appointments, proposals, invoices, tasks, documents, and assets.



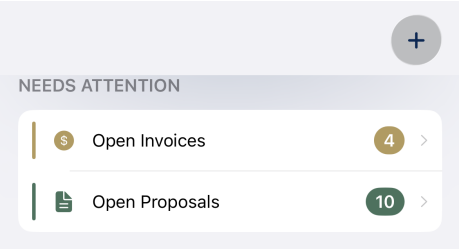
When you're ready to take action, you can create a new appointment, proposal, invoice, or task directly from the contact. The **three-dot menu** in the upper-right corner gives you additional options, such as calling, texting, or emailing the customer, getting directions, adding a note, or editing their information.

Billing

The **Billing** tab brings together the information you need to understand what requires attention now, how the business is performing, and where proposals and invoices stand.

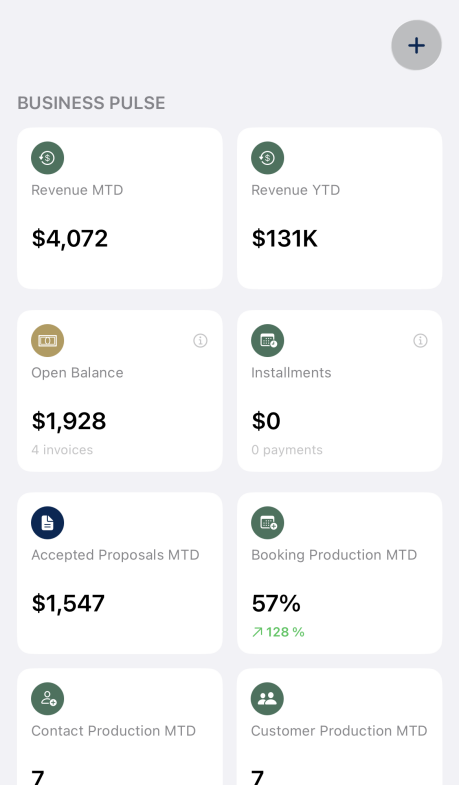
Needs Attention

At the top of the Billing tab, **Needs Attention** surfaces outstanding items that may require follow-up. This section updates dynamically based on activity in your organization, so the categories and items you see may change from day to day.



Business Pulse

Business Pulse gives you a series of snapshots you can use to quickly understand different parts of business performance. Rather than building a report or navigating through multiple areas of ServiceMinder, you can move between these snapshots directly from the Billing tab.



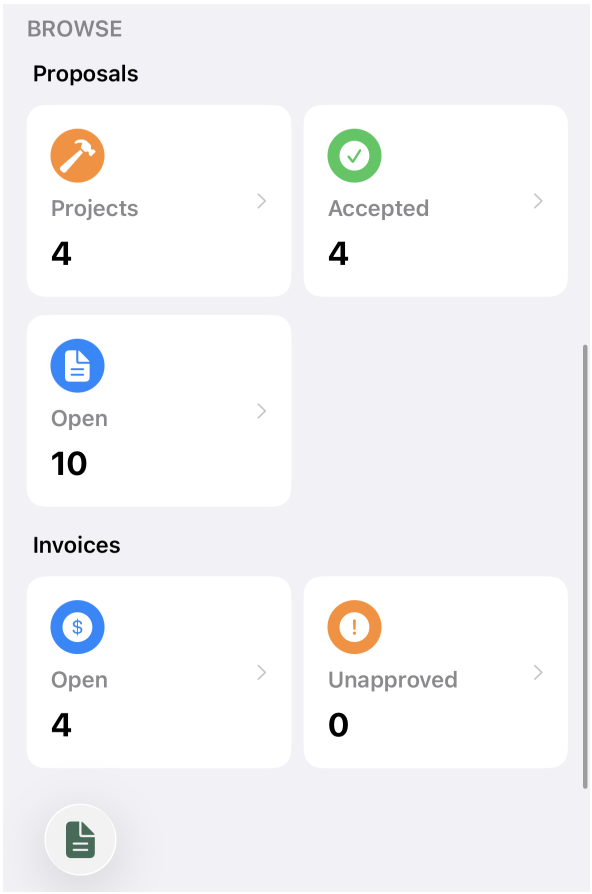
Available snapshots include:

Snapshot	What it tells you
Revenue MTD	Total invoiced revenue for the current month, compared with the same period last year.
Revenue YTD	Total invoiced revenue for the current year, compared with the same period last year.
Open Balance	Total unpaid balance across all open invoices. This represents revenue that has been billed but not yet collected.

Snapshot	What it tells you
Installments	Total remaining balance on active installment payment plans. This represents scheduled future payments from customers.
Accepted Proposals MTD	Dollar value of proposals accepted by customers during the current month. Higher values indicate stronger sales closing.
Booking Production MTD	Of the contacts added during the current period, the percentage that received at least one appointment. This can be a leading indicator of conversion.
Contact Production MTD	Number of new contacts added during the current period. This can be a leading indicator of future revenue potential.
Customer Production MTD	Number of contacts who received their first invoice during the current period, reflecting new revenue-generating customers.
Acquisition	Of all new contacts added this year, the percentage that received at least one invoice. Higher rates indicate more effective lead conversion.
Retention	Of all contacts from the prior year, the percentage that received at least one invoice this year. Higher rates indicate stronger customer retention.
Reworks	Percentage of completed appointments that required a return visit, broken down by service type. Lower rates generally indicate fewer reworks.
Contacts	Total contacts in ServiceMinder grouped by contact category, showing the overall composition of your contact base. Default categories include **Customer** and **Prospect**, but organizations can create custom categories to fit their needs.

Browse

The **Browse** section gives you direct access to proposals and invoices when you need to move from a high-level snapshot into the underlying work.



From here, you can browse:

- **Proposals**, including projects, accepted proposals, and open proposals.
- **Invoices**, including open and unapproved invoices.

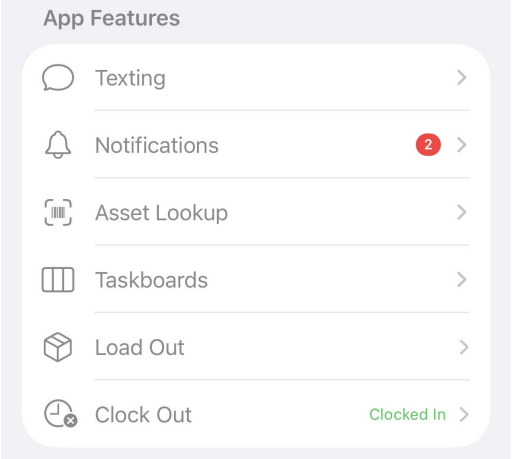
Together, these three areas make the Billing tab useful for both quick daily follow-up and a broader view of how the business is performing.

More

The **More** tab is where you'll find additional tools and settings that support your day-to-day work in the app. The page is organized into sections for app features, preferences, security, and support.

App Features

The **App Features** section gives you quick access to tools you may use throughout your workday.

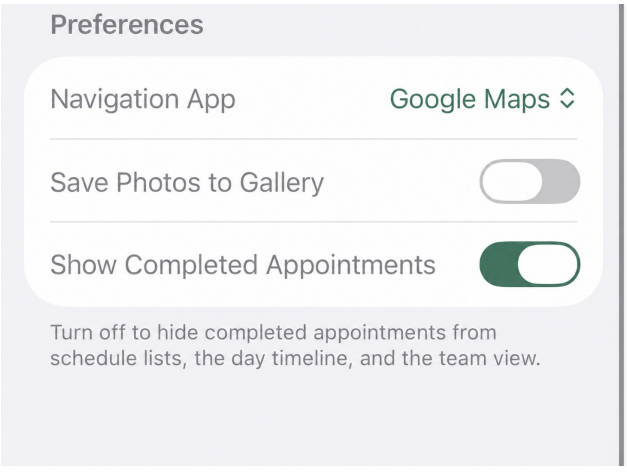


Feature	What it does
Texting	Opens the texting hub, where you can access your ServiceMinder text conversations.
Notifications	Shows ServiceMinder notifications that are waiting for you to review.
Asset Lookup	Lets you scan or search for a piece of equipment by serial number. Requires Asset Management to be configured for your organization.
Taskboards	Lets you organize appointments, contacts, and proposals into columns you can drag between in a Kanban-style view to track where things stand across a job or workflow. Requires Taskboards to be configured for your organization.
Load Out	Shows the services and parts associated with your scheduled work for the day, helping you make sure you have what you need before heading out.*
Clock In/Out	Allows you to record your working hours by Clocking In and Out.

*Your Load Out also appears automatically the first time you open the app each day. If you need to check it again later, you can return to **More > App Features > Load Out** at any time.

Preferences

Use **Preferences** to customize how ServiceMinder works on your device.



Preference	What it does
Navigation App	Choose which navigation app opens when you tap an address or select **Get Directions**.
Save Photos to Gallery	Saves photos taken through ServiceMinder to your phone's photo gallery in addition to uploading them to ServiceMinder.
Show Completed Appointments	Controls whether completed appointments remain visible in your schedule lists, daily timeline, and team schedule.
Push Notifications	Opens your device's notification settings for ServiceMinder so you can control how app notifications appear on your phone. Available notification options and terminology may vary by device.

Feature Toggles

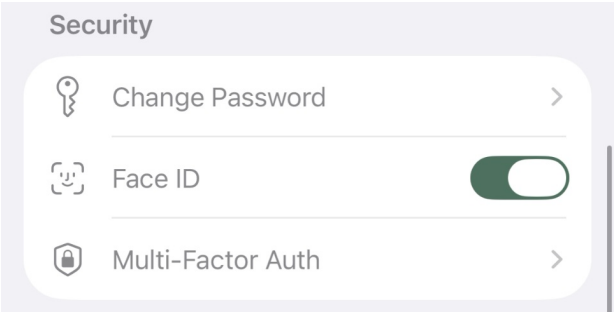
The **Feature Toggles** section lets you turn supported optional features on or off. The options you see may vary depending on your device and the features currently available to your organization.



Feature	What it does
AI Features	Get quick appointment briefings, polish and summarize notes, and fill out forms from a short description. *On iPhone, AI features run on-device and require an iPhone 15 Pro or newer.* *On Android, availability and whether AI runs on-device or online may vary by device.*
Siri Shortcuts	Enables supported ServiceMinder actions through Siri Shortcuts. **iPhone only.**
Live Activity	Displays progress for your current job on your Lock Screen so you can see its status without reopening the app. **iPhone only.**
Prompt for Tips	Controls whether ServiceMinder prompts for a tip when applicable.

Security

The **Security** section is where you can manage how you sign in and protect your ServiceMinder account.

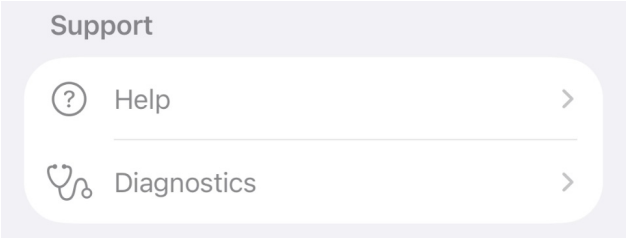


From here, you can:

- **Change your password.**
- **Enable Face ID** for faster sign-in on supported iPhones.
- **Manage multi-factor authentication (MFA)** for your account. Multi-factor authentication adds an additional verification step when you sign in. Depending on your account configuration, verification codes may be delivered by **text message, email, or an authenticator app**.

Support

If you run into an issue while using the app, the**Support** section gives you a direct path to get help.



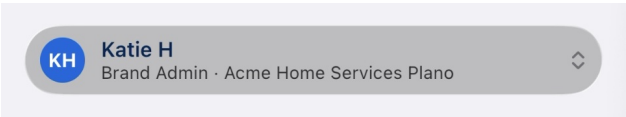
From here, you can:

- **Submit a help ticket** to the ServiceMinder Support team.
- **Submit diagnostics** when you're experiencing an app issue or failure. Diagnostic information can help the Support team troubleshoot what happened.
- **Sign out** of the ServiceMinder app.

Other Settings

Switch organizations

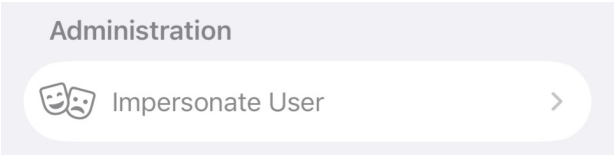
If your user belongs to multiple organizations, the organization shown at the top of the**More** tab includes a drop-down menu. Use it to switch between organizations without signing out of the app.



Before creating or updating information, check that you're working in the correct organization.

Impersonate another user

If you have the **Impersonation** permission, you can impersonate another ServiceMinder user from the **Administration** section under **More**.



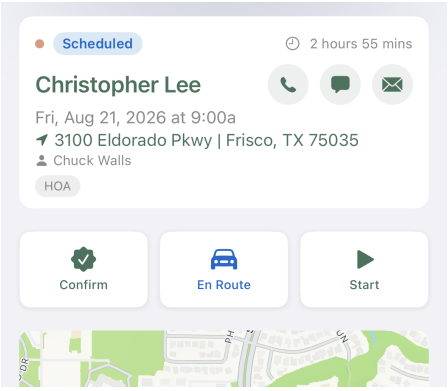
This option is typically available only to users with elevated permissions, such as Brand Administrators, and may not appear for everyone.

Navigation Patterns Throughout the App

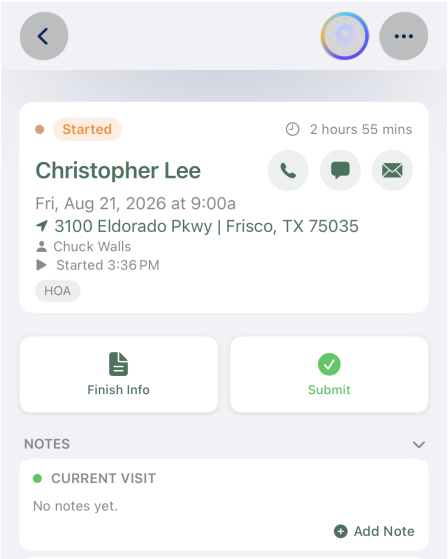
In addition to the four main tabs, you'll see a few navigation patterns repeated throughout ServiceMinder that can help you move through your work without losing your place.

Move Through an Appointment

When you open an appointment, the quick-action tiles help you move through the job. The actions you see change based on the appointment's current phase, so ServiceMinder only shows the options that make sense for where the job currently stands, such as **Grab, Confirm, En Route, Start, Finish Info,** or **Submit**.



Tapping **Start** moves the appointment into the Started phase and opens any Start information your organization requires. If you see a number on the action tile, it indicates that there are required items to complete.



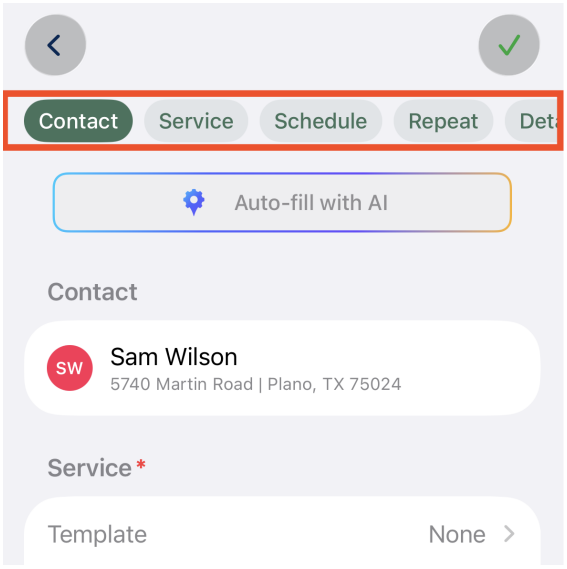
Start Info and **Finish Info** open as sheets over the appointment instead of taking you to a separate page. This lets you work through required information, notes, payment, signatures, and other job details while keeping the appointment itself open underneath, so you can close the sheet and return right where you left off.

When you're ready to wrap up the job, **Finish Info** brings the remaining close-out steps together in one place. Depending on your organization's setup, that may include notes, custom fields, checklists, forms, photos, signatures, pricing, or payment.

If something required is preventing you from finishing, ServiceMinder identifies the blocker so you can tap it and go directly to what still needs attention.

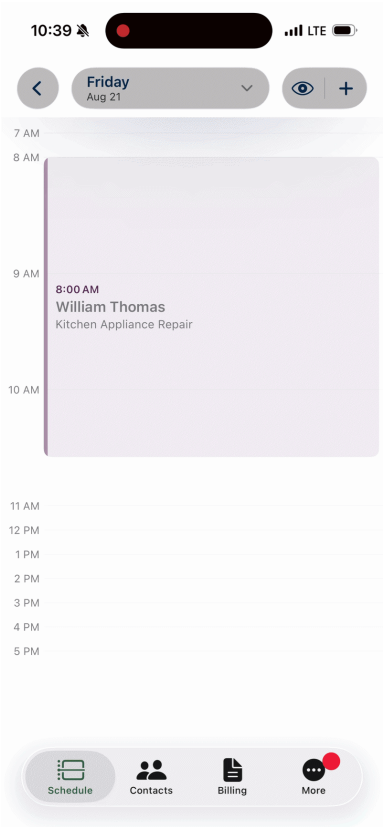
Jump Between Sections on a Form

Longer forms (like when you are creating a proposal, appointment, or invoice) are divided into sections, with section shortcuts at the top of the form. Tap a shortcut to jump directly to that section instead of scrolling through the entire form.



Look for Long-Press Shortcuts

Long press is used throughout the app to surface additional information or context-specific actions without requiring you to open another screen. A long press means touching and holding an item on the screen for about a second instead of tapping and releasing right away. When long press is available, holding the item will open a preview, menu, or additional actions.



The available behavior depends on what you're viewing. See Mobile App Tips and Tricks for examples of where you can use long press.