Contacts in the Mobile App

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Overview

The **Contacts** tab gives you one place to find the people your organization works with and quickly understand the history behind each customer. Whether you're preparing for a job, following up after one, or helping someone from the office, you can find their contact information, past activity, notes, photos, billing records, and next actions without jumping between different parts of ServiceMinder.

This article will review:

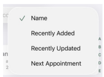
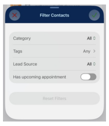
 Note: The features and options you see in the ServiceMinder mobile app may vary based on your device and operating system, app version, user permissions, and your organization's configuration.

Find the Right Contact Faster

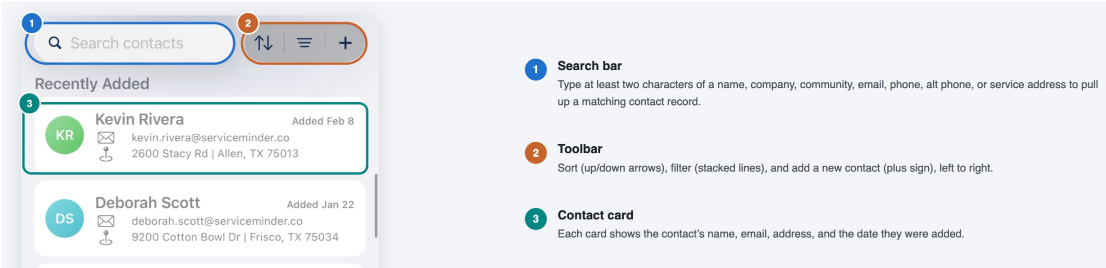
The Contacts tab is designed to help you get to the person you need without scrolling through a long customer list.

Contacts begin loading right away while the rest of the list continues loading in the background, so you can start working without waiting for every contact in your organization to load.

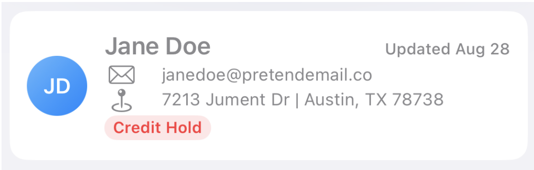
Use the available sorting and filtering options to narrow the list based on what you're looking for. Options include:

<table>
<tr><th>Type</th><th>Options</th><th>What you see</th></tr>
<tr><td>Sort
changes the order contacts appear in</td><td>Name
Recently Added
Recently Updated
Next Appointment</td><td>
</td></tr>
<tr><td>Filter
narrows the list to only contacts that match certain criteria</td><td>Category
Tags
Lead Source
Has upcoming appointment</td><td>
</td></tr>
</table>

You can also narrow the list to contacts with an upcoming appointment. The updated Contacts experience includes filters for category, tags, lead source, and upcoming appointments.



If an account is on **Credit Hold**, you'll see that status directly from the contact list. That gives you a chance to catch an important account condition before it becomes a surprise when you're already in the field.



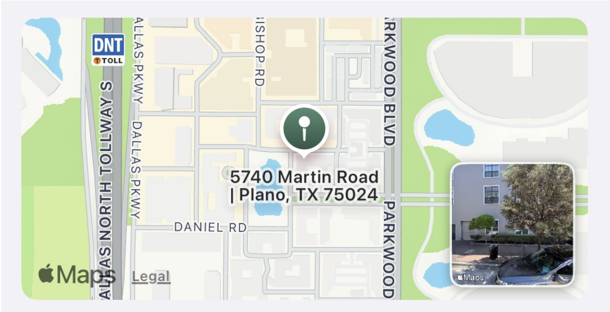
Get Caught Up

Open a contact to get a fuller picture of the customer and your organization's history with them.

At the top of the page, you'll see key information such as the contact's **name, address, tags, and communication options**. From there, the rest of the page brings together the information you may need to understand who you're working with and what's happened before.

Know you're headed to the right place

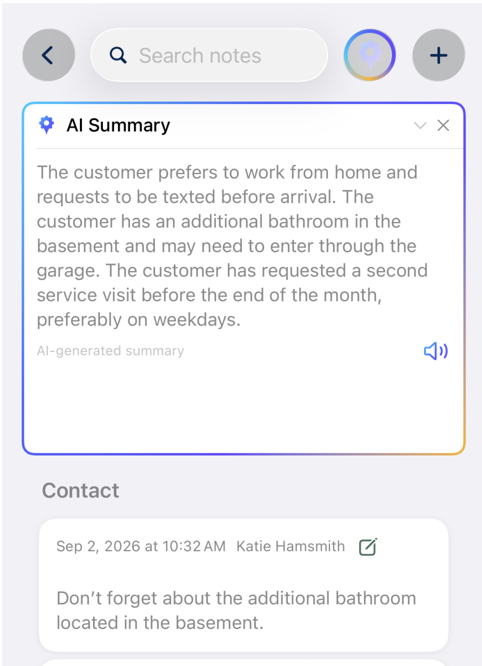
The map shows the customer's location, and you can tap the address to open directions in your preferred navigation app. When available, a street-level property photo can also help you recognize the correct house when you arrive. Property photos are also available from the appointment workflow as a way to confirm you're at the right location.



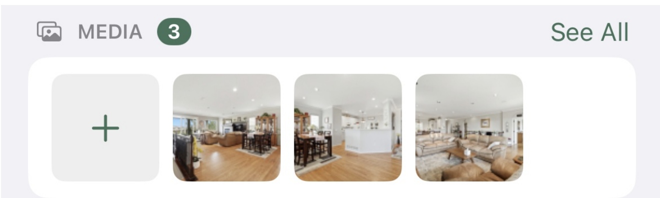
Review notes and photos for context

Internal Notes help your team keep track of information that shouldn't be shared with the customer. Before a visit, these can give you useful context about previous work, customer preferences, or anything else your team needs to know.

On supported devices, ServiceMinder can summarize longer note histories so you can quickly understand the important context without reading through every entry. Open **Internal Notes**, then tap the **ServiceMinder icon** at the top of the screen to generate a summary of the contact's notes.



The **Media** section gives you quick access to recent photos and files attached to the contact. Tap**See All** when you need the complete gallery, or use **+** to add new media.



See the Customer's History in One Place

The **Related** section connects the contact to the work and communication associated with them, so you don't have to search different areas of ServiceMinder for each record.

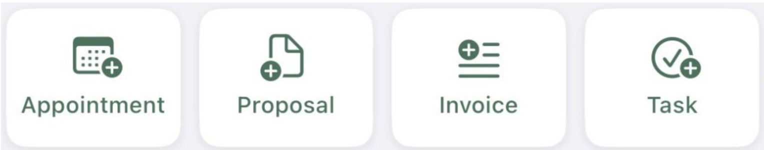
From the contact, you can jump directly to their:

- **Appointments**
- **Proposals**
- **Invoices**
- **Tasks**
- **Emails**
- **Documents**
- **Assets**

This can be especially useful before speaking with a customer. You can check previous work, see whether a proposal or invoice is still open, or review what has already been communicated before deciding what needs to happen next.

Start the Next Step

Once you know what the customer needs, you don't have to leave their record and start over somewhere else.



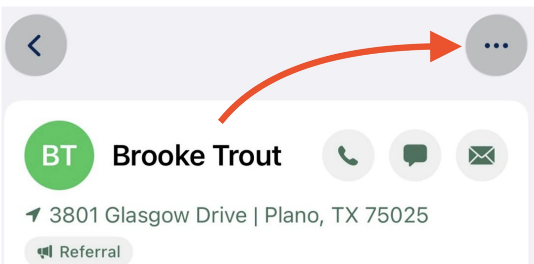
Use the quick-add actions on the contact page to create a new:

Action	When it's useful
Appointment	Schedule new work for the customer
Proposal	Put together pricing for work you're discussing
Invoice	Create a bill directly for the contact
Task	Capture a follow-up or other work that needs to happen

Because you start from the contact, ServiceMinder already knows which customer you're working with.

More Quick Actions

Tap the **three-dot menu** in the upper-right corner for additional ways to manage the contact without leaving their record. This gives you one more shortcut for handling common customer actions right from the contact you're already working with.



Depending on your permissions and organization configuration, available actions may include:

- **Edit**
- **Call**
- **Text**
- **Email**
- **Directions**
- **Add Note**
- **Add to TaskBoard**.

Keep Important Details Together

Farther down the contact record, you'll find additional information your team can use to understand and manage the account.

Contact Info includes details such as phone number, email address, the ServiceMinder user assigned as the contact owner, and whether the customer has a card on file. Card information is masked; the full card number is not displayed.

Custom Fields contain any additional information your organization has configured to track about its contacts. These appear separately from the tags shown near the top of the contact.

Quick Shortcuts

Preview a contact without fully opening it

Press and hold a contact card to open a quick preview of the contact without navigating all the way into their record.

> **What does “press and hold” mean?** Touch and hold the card for about a second instead of tapping and releasing it right away.

Copy contact information

Press and hold a **phone number or email address** on the contact detail page to copy it. This can be especially helpful if you need to paste the information into another app, such as a separate calling or VoIP tool.

Do more with contact photos

When viewing a photo, press and hold it to access available actions such as**Copy** or **Save to Photos**. The mobile app also supports copying, saving, and sharing photos from its photo views.
