

Working Appointments in the Mobile App

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Overview

From getting ready for your first job to wrapping up at the end of the day, the ServiceMinder mobile app is designed to keep the information and actions you need close at hand. You can check what you need before you leave, get caught up on the customer before you arrive, document work as it happens, and complete close-out steps without jumping between different parts of ServiceMinder.

This article will review:

- Before You Head Out
- Get to the Job
- Start the Appointment
- Document the Work
- Finish the Job and Accept Payment
- Wrap Up and Move On
- Managing Appointments
- Tips for Working an Appointment

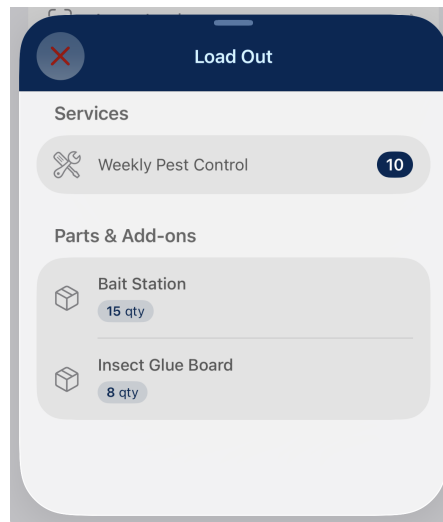


Note: The features and options you see in the ServiceMinder mobile app may vary based on your device and operating system, app version, user permissions, and your organization's configuration.

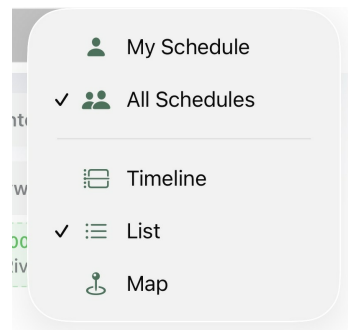
Before You Head Out

When you start your day, ServiceMinder prepares your scheduled appointment information so the details you'll need are available even if you run into poor service later. Before leaving for your first job, take a minute to review the day ahead and make sure you have what you need.

1. Review your **Load Out**, which appears automatically the first time you open ServiceMinder each day. It shows the services and parts associated with your scheduled work so you can make sure you have what you need before heading out. You can return to it anytime under **More > App Features > Load Out**.

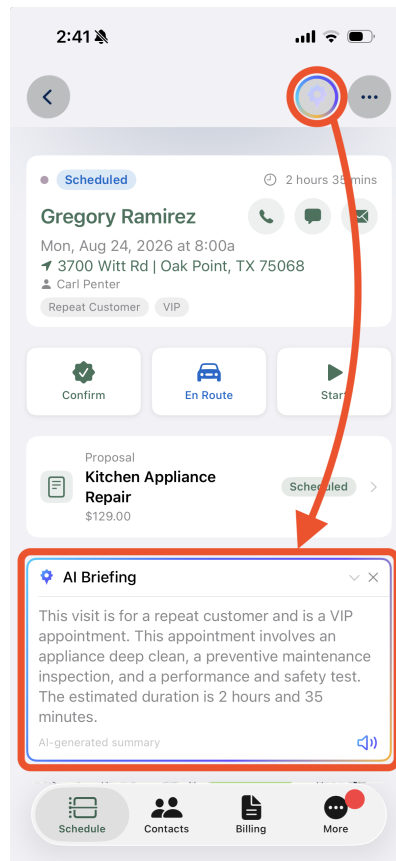


2. Open **Schedule** to see today's appointments. Tap the eye icon to switch between views. You can use **Timeline**, **List**, or **Map** view depending on how you prefer to plan your day.



3. Open your first appointment and review any details you need before leaving. Previous appointment notes, contact information, proposals, and other related records can give you useful context before you arrive.

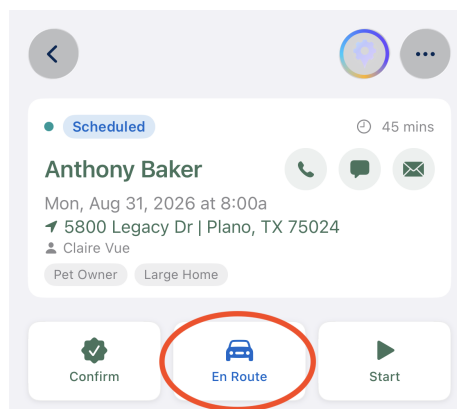
4. On devices that support AI features, tap the ServiceMinder icon at the top of the appointment details page to activate **Appointment Briefing** for a quick summary of important appointment information. It pulls together context such as notes, custom fields, and flash messages so you can get caught up without digging through the entire record.



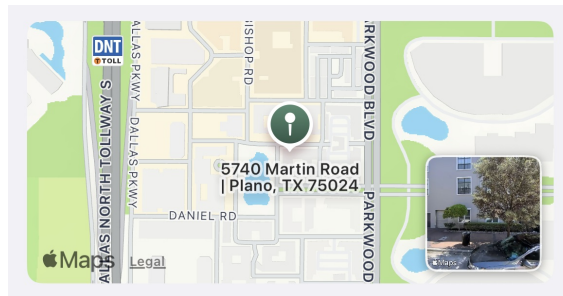
Get to the Job

Once you're ready to leave, you can handle the transition from scheduled work to an active visit directly from the appointment.

1. Tap **Send En Route** to update the appointment and let the customer know you're on your way.



2. Use the property photo on the appointment or contact, when available, to help confirm you're at the correct location.



3. Tap the address on the map to open the location in your preferred navigation app. You can choose your default navigation app under **More > Preferences**.



open.

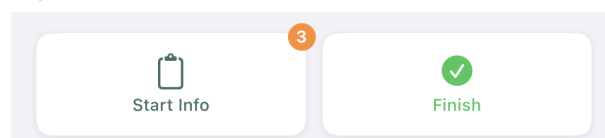
If you need more context while you're on the way or once you arrive, you don't have to lose your place in the appointment. Each main tab remembers where you were, so you can switch to **Contacts** to look something up and return to **Schedule** with the appointment still

Start the Appointment

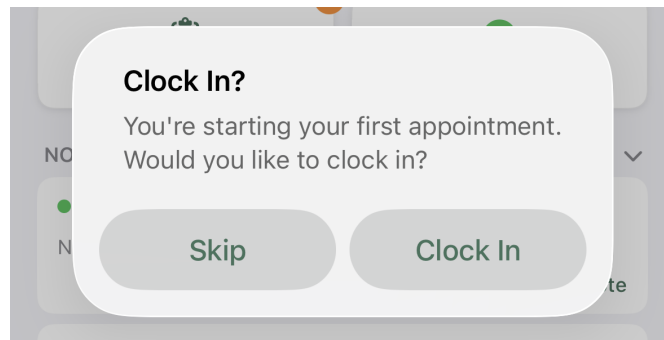
When you arrive, starting the appointment moves it into the next phase and brings forward anything your organization requires before work begins.

1. Tap **Start** on the appointment. ServiceMinder moves the appointment into the Started phase and opens any required **Start Information**.

Revisit the Start Info at any time during the appointment. Hint: The number on the Start Info button indicates the number of required fields.



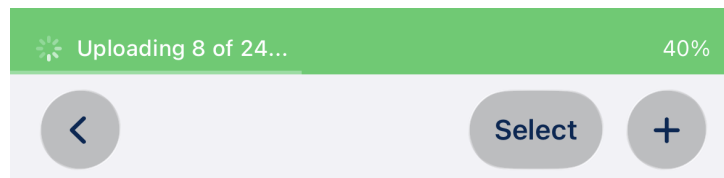
2. If this is your first appointment of the day and your organization uses time tracking, you may also be prompted to clock in. You can also access **Clock In/Out** anytime from **More**.



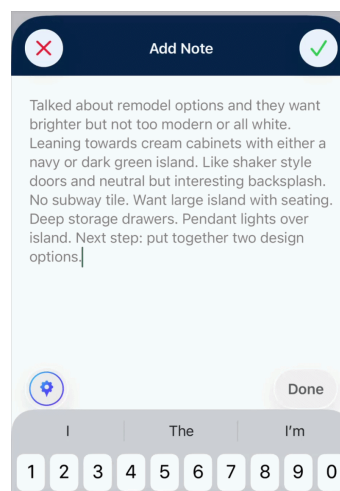
Document the Work

As you work, keep the appointment updated so the record tells the story of what happened on-site. Photos, notes, checklists, and forms stay connected to the appointment, and you can document things as they happen instead of trying to reconstruct the visit at the end.

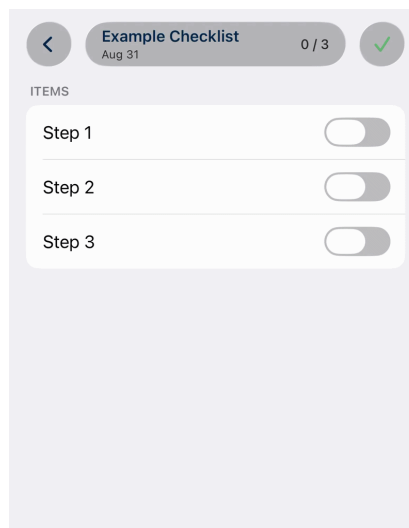
1. **Take photos as you go.** You can capture up to **10 photos at a time** using the in-app camera. When selecting existing photos from your phone's library, the number you can choose at once is based on your organization's **App Gallery Upload Limit** under **Control Panel > Scheduling**. This setting defaults to **5 photos** but can be increased up to **30**.
2. **Keep working while photos upload.** Uploads can continue in the background while you move to another part of ServiceMinder or switch to another app, so you don't have to wait for every photo to finish before continuing the job. A status bar will remain at the top of the app, letting you monitor the progress of the upload.



3. **Add notes while the details are fresh.** On supported devices, you can use **Note Polish** to clean up rough field notes into clearer, more professional wording. Note Polish is available in appointment notes as well as finish notes and several other areas of the app.



4. **Complete checklists, forms, and other required information as you work.** Checklists save your progress as you go, so an interruption or connection change doesn't mean starting over.



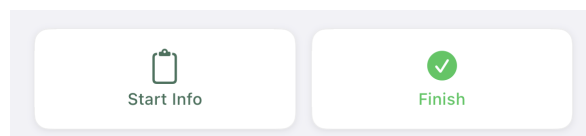
The notes you add today also become useful context for the next visit. Service Agents can review prior appointment and contact notes later, and supported devices can summarize longer note histories when someone needs to get caught up quickly.

Did the scope of the work change while you were on site? In the **Details & Pricing** section, tap **Edit Line Items** to adjust what is reflected on the appointment. The invoice total updates as you make changes.

DETAILS & PRICING			
Item	Qty	Rate	Total
Weekly Pest Control	1	\$0.00	\$89.00
Routine residential pest control service that includes			

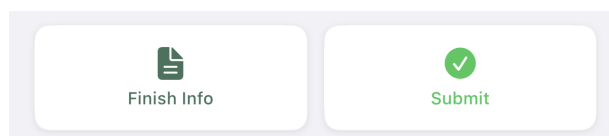
Finish the Job and Accept Payment

Once you reach the end of an appointment, tap **Finish**.

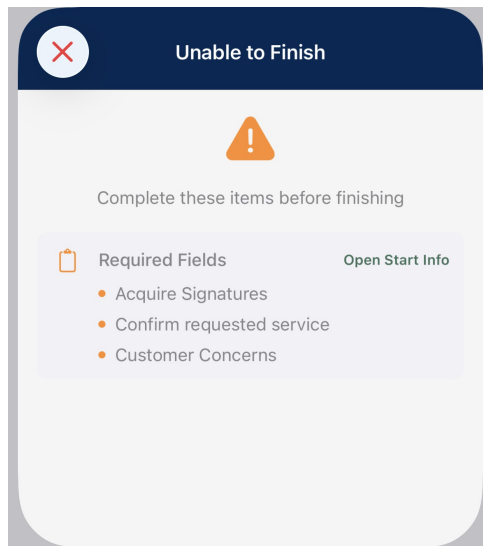


This will bring up the **Finish Information** for you to review. Depending on your organization's setup, Finish Info may include notes, custom fields, checklists, forms, photos, signatures, pricing, or payment. Complete the necessary fields and tap the green check mark to close it out.

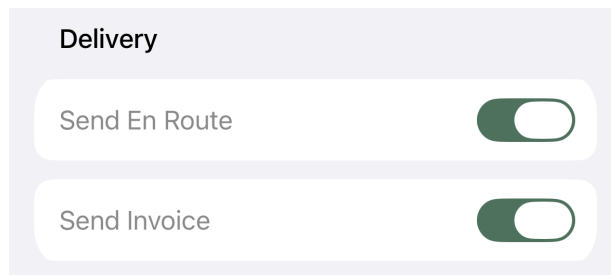
Tap **Submit** to close out the appointment.



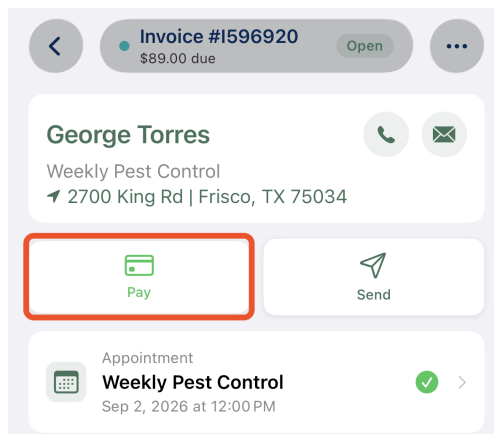
If something required is preventing the appointment from being completed, ServiceMinder identifies what's missing and lets you go directly to the item that needs attention.



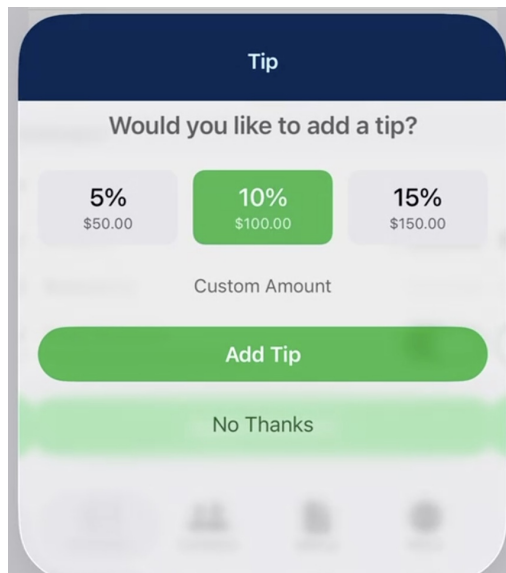
The Finish sheet will include an option to send an En Route notification to your next appointment as you wrap up the current job. Look for it in the **Delivery** section. You can also choose whether or not to send an invoice, if one is generated.



Once you've submitted the finished appointment, an invoice will automatically be generated if it is configured to do so. From here, you have the option to collect payment on the spot.



If payment is collected in person, the customer can select their preferred payment method and choose whether to add a tip.

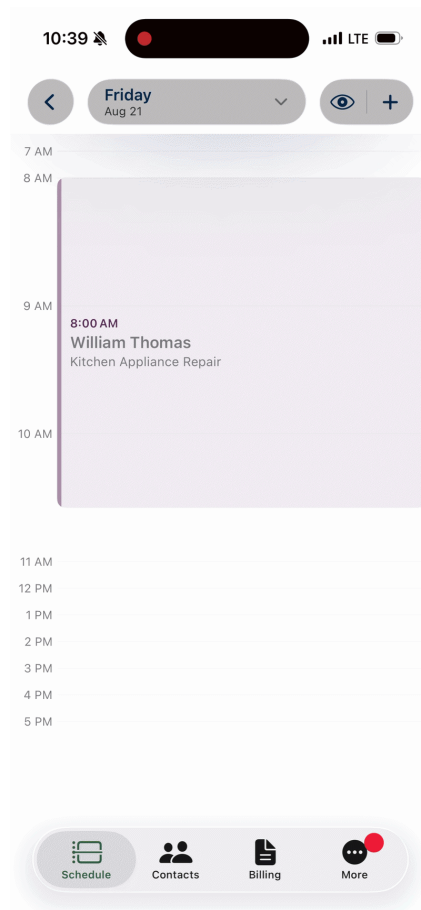


Your Start Info and Finish Info is saved automatically every few seconds while you're working. If the app closes or restarts before you submit, your line items, notes, custom fields, signature, and other saved finish information can be restored when you return.

Wrap Up and Move On

Once one job is complete, your schedule is ready for the next one. Return to **Schedule** to see what's coming up, adjust the day when plans change, or head straight into the next appointment.

If your schedule needs to change, long-press an appointment to access available actions such as **Reschedule**, **Requeue**, **Carry Over**, or **En Route**, depending on its current status. You can also drag appointments directly on the schedule to move them to another time or Service Agent.



After your final appointment, ServiceMinder will prompt you to clock out if your organization uses time tracking.

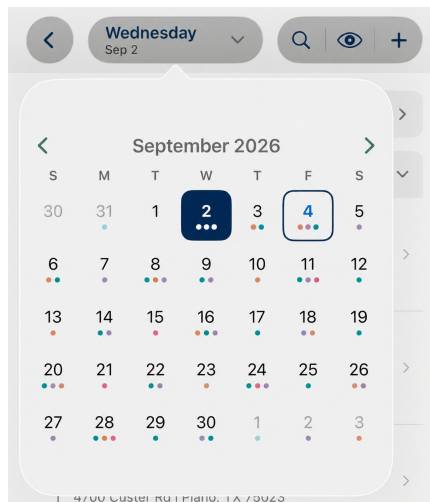
Managing Appointments

Whether you're opening today's work, scheduling something new, or adjusting plans after the day is already underway, you can handle common appointment changes directly from the mobile app.

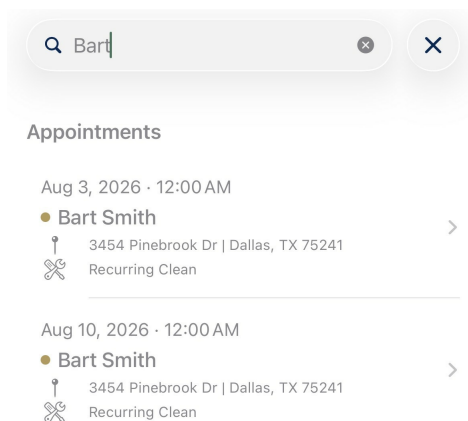
Find and Open an Appointment

he **Schedule** tab opens to **My Schedule**, where you can see your appointments for the selected day. Tap an appointment from the Timeline, List, or Map view to open it.

To move to another day, tap **Today** (or the currently selected date) in the upper-left corner and choose a date. Days with scheduled appointments are marked with a dot.



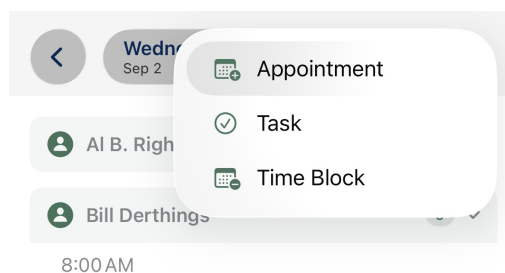
If you're looking for a specific appointment across the team schedule, tap the **magnifying glass** to search by contact name, appointment address, or service name.



Create an Appointment

You can add new work to the schedule without switching to the web application.

1. From **Schedule**, tap **+**.
2. Select **Appointment**.



3. Select the customer and enter the appointment details, including the date and time, service, assigned Service Agent, and any other information needed for the visit.
4. Save the appointment.

The new appointment is added to the schedule.

Tip: You can also start from the customer. Open their contact record and select **Appointment** from the quick actions to create a new appointment with the contact already selected.

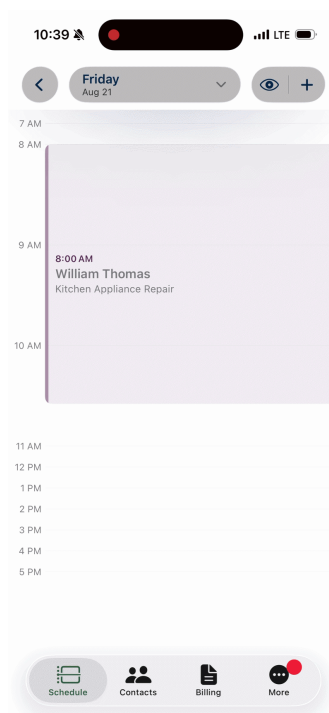
The app also lets you use the **+** button to create a **Task** or **Time Block** when what you're adding isn't customer work.

Make Changes to an Existing Appointment

Plans change, and you can update an existing appointment without recreating it.

There are two places you can access appointment management actions in the mobile app:

- Open the appointment and tap the **three-dot menu** for actions related to editing, documenting, or managing the appointment.
- **Long-press an appointment from the schedule** for quick access to common scheduling actions without opening the appointment first.



If you need to...	Use	What happens
Change appointment details such as line items, notes, custom fields, Customer Notes, Flash Message, or Tentative status	Edit	Opens the full appointment for editing. You can also change the scheduled date, time, or assigned Service Agent.
Quickly add an internal note	Add Note	Opens a new note so you can add information without editing the full appointment.
Add a checklist to the appointment	Add Checklist	Lets you select and attach a checklist to the appointment.

If you need to...	Use	What happens
Track the appointment on one of your organization's TaskBoards	Add to TaskBoard	Adds the appointment to a TaskBoard you select. The available boards and what they track depend on how your organization has configured TaskBoards.
Assign the appointment to a different Service Agent	Transfer	Choose a new Service Agent. You can add an Internal Note and choose whether to send the customer a confirmation about the change.
Move the appointment to a different date or time	Reschedule	Choose a new date and time. You can add an Internal Note and choose whether to send the customer an updated confirmation.
Remove the appointment from the schedule so it can be picked up or scheduled again	Requeue	Removes the assigned Service Agent and scheduled time, then returns the appointment to the queue. You can add an Internal Note, but there is no customer confirmation option.
Schedule another visit because the work was not completed	Carry Over	Keeps the original appointment and lets you schedule an additional date and time to continue the work.



The options available to you will vary depending on your user permissions and organization configuration.

Tips for Working an Appointment

- **Lose your signal? Keep working.** Supported appointment actions, notes, and photos can continue without a reliable connection and sync when you're connected again.
- **Need information from somewhere else in ServiceMinder?** Switch tabs without worrying about losing your place. When you return to Schedule, the appointment you were working remains open where you left it.
- **Picking up an unassigned appointment?** Eligible queued appointments may include a **Grab** action that assigns the appointment to you and adds it to your schedule.
- **Use Siri when your hands are busy.** On supported iPhones, Siri Shortcuts can help with actions such as checking your next ServiceMinder appointment. Siri Shortcuts can be enabled under **More > Feature Toggles**.
- **Need help while you're in the field?** Go to **More > Support** to submit a help ticket or diagnostics when you're experiencing an issue.