What's New in the Mobile App

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Overview

The new ServiceMinder mobile app is built around a simple idea:**the less time you spend hunting for information, switching between tools, or following up on things you could already know, the more time you have to get work done.**

Whether you're moving from job to job, helping a customer from the office, or keeping an eye on the business, the new app puts more of what you need right where you're already working. Here's what that looks like in practice.

This article will review:

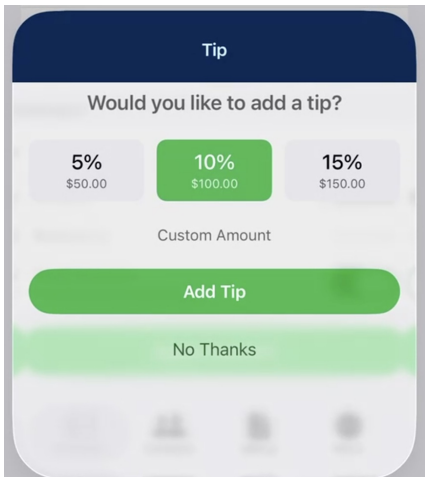
- Payments & Follow-Up: Get Paid Faster
- Customer Context: Arrive Prepared
- Contacts & Records: Less Digging
- Schedule & Routing: Keep Work Moving
- Business Tools: Work From Anywhere

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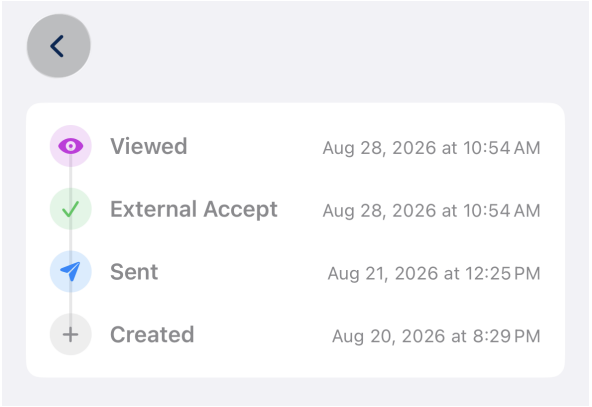
Payments & Follow-Up: Get Paid Faster

Getting the job done is only part of the work. The new app makes it easier to move from completed work to approved proposals and paid invoices without as much chasing, checking, or explaining.

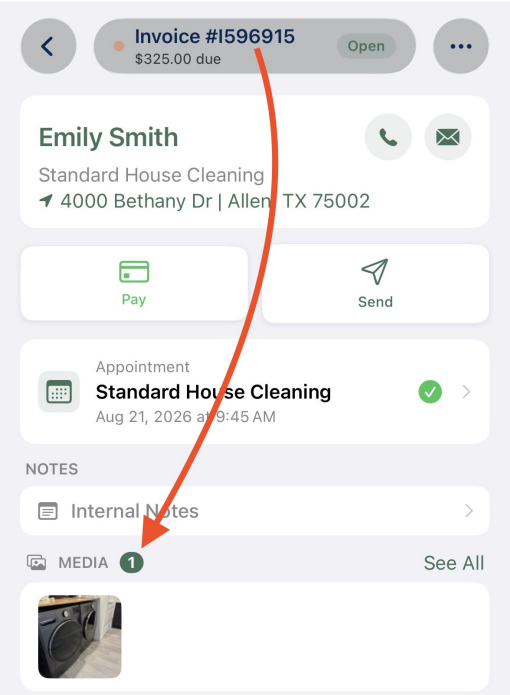
Make tipping part of the payment experience. Customers can now leave a tip right when they pay their invoice, with quick preset percentages to tap instead of doing the math themselves. It's an easier experience for the customer and one fewer awkward conversation for your crew. Enable this feature in the **More** tab in the **Feature Toggles** section.



Know when it's time to follow up. You can now see a proposal's entire history — created, sent, viewed, accepted — right from your phone. Invoices also show the last time a customer viewed them, so you can follow up with context instead of wondering whether they've seen what you sent.



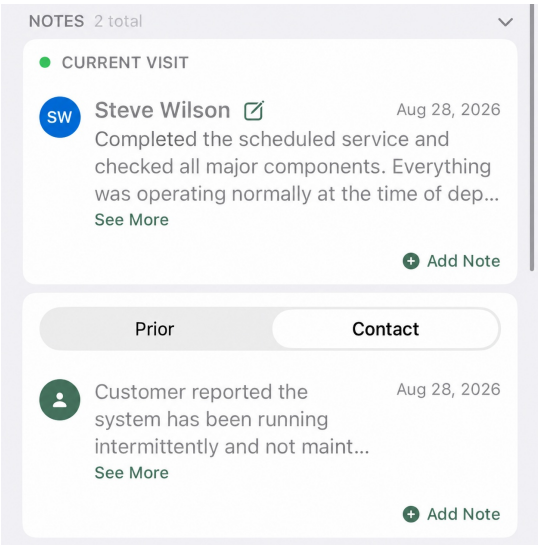
Give customers the full picture with job photos. Photos taken during the job now show up directly on the invoice. Customers can see exactly what was done without you having to dig back through the appointment to find supporting photos.



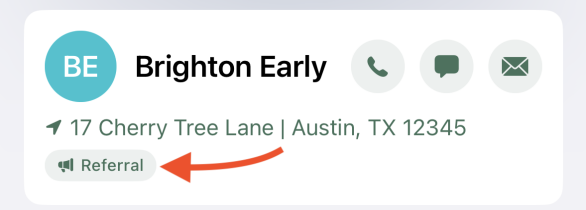
Customer Context: Arrive Prepared

A few minutes of preparation can make a big difference when you're standing at a customer's door. The new app brings more of the context you need into one place so you can get up to speed quickly and move on to the work itself.

Catch up on the customer in seconds. Before you knock on the door, pull up notes from the previous visit, the contact overall, and any proposals — all sorted and easy to flip between. The app can even summarize older notes for you, so you can get the important context without scrolling through a long history.



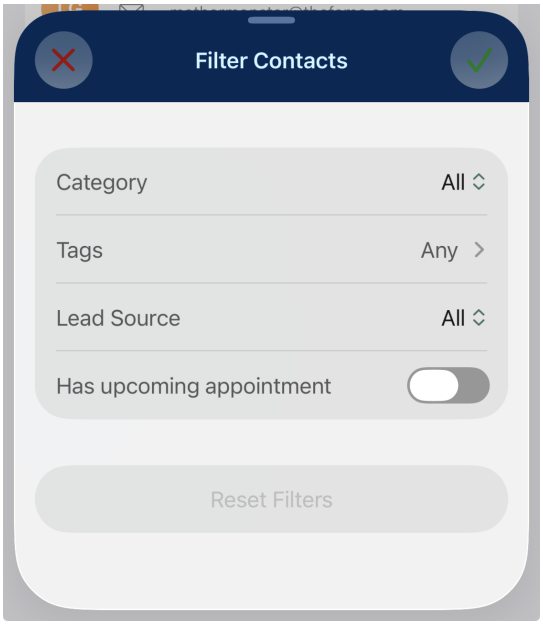
See where a lead came from. Contacts now show where a lead originated, and you can control whether you're notified the moment a new one comes your way.



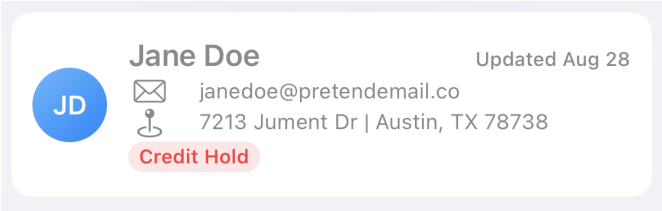
Contacts & Records: Less Digging

More of the everyday work you do with customers can now happen directly from the contact, appointment, proposal, or invoice you're already looking at.

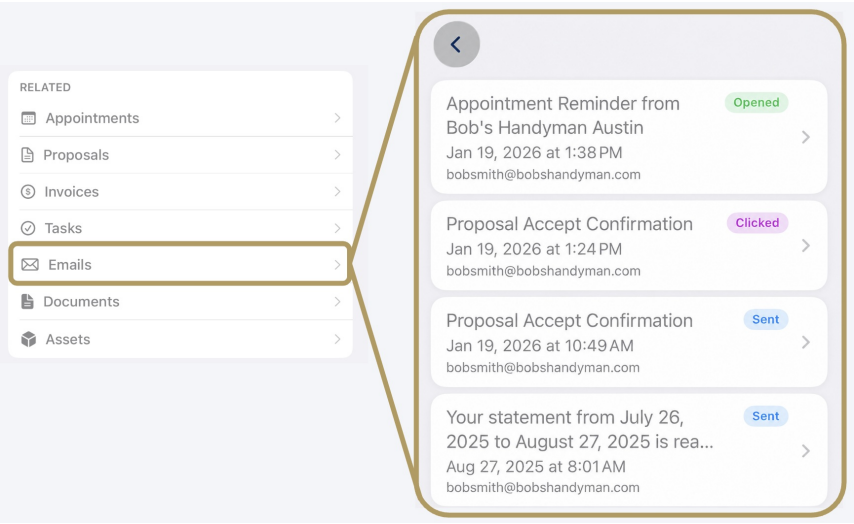
Find the right contact faster. Sort and filter your contact list to quickly narrow down who you're looking for.



Accounts on credit hold are also flagged directly in the list, helping you catch important account information before it becomes a surprise in the field.

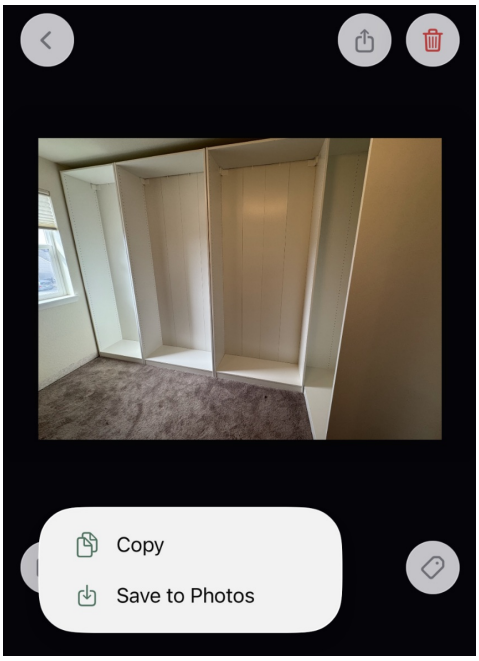


See your customer emails without having to search for them. Every email you've sent a customer — along with whether they've opened it — now lives right on their contact page. You can quickly see what was communicated before deciding what needs to happen next.

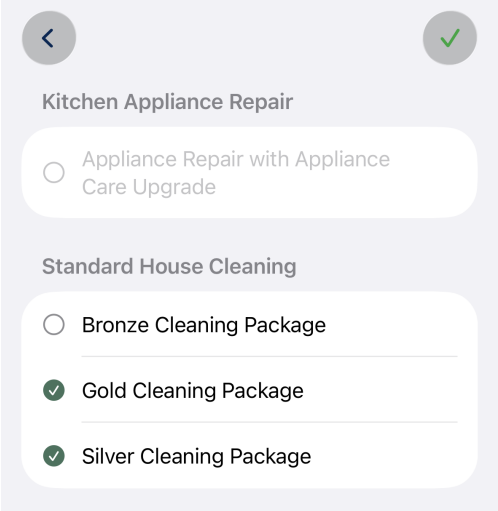


Do more with job photos right from the app. Copy, save, or share photos whether you're looking at the gallery, the photo strip, or the full-screen viewer. When a photo needs to go somewhere else, you don't have to work around the app to get it there.

Hint: Long press the photo to display the Copy and Save options.



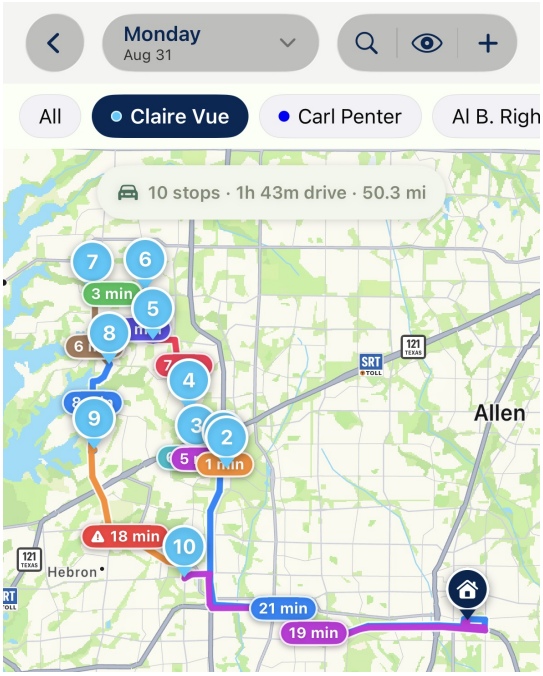
Build proposals and invoices without rebuilding your templates. Need pieces from more than one service package? You can select multiple templates within the same service, and they'll combine into one list instead of replacing each other.



Schedule & Routing: Keep Work Moving

A workday rarely goes exactly according to plan. The new app gives teams more visibility into the schedule, the work, and the parts they need so they can make adjustments without calling back to the office for every answer.

See the whole day's route at a glance. Service Agents can pull up their full route on a live map, complete with drive times and current traffic. It's easier to see what's ahead, understand how the day fits together, and adjust when plans change.

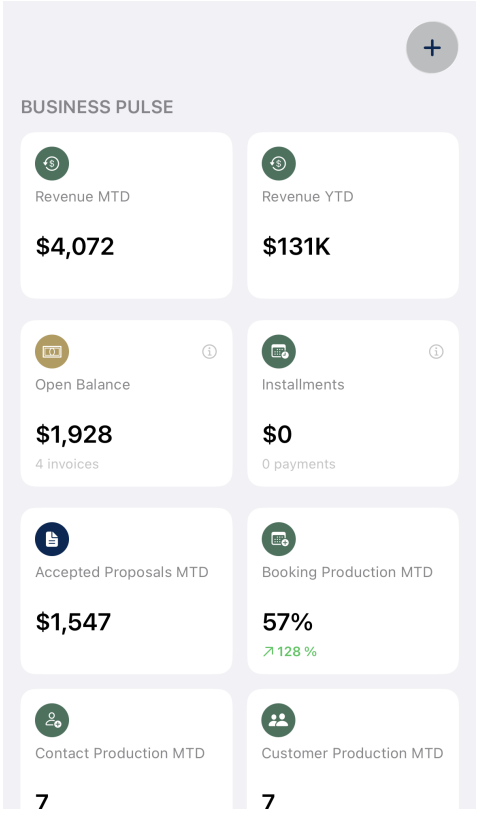


Know what parts you have before you need them. See what you have on hand versus what you need, make adjustments and transfers, and add multiple parts at once — all from the app. That's less time checking with the shop and more confidence that you have what the job requires.

Business Tools: Work From Anywhere

The new app isn't only about making life easier in the field. Owners, admins, and office teams have more visibility too, so more questions can be answered and more work can be handled wherever you happen to be.

Get a clearer picture of the business from the Billing tab. Key numbers are now available at a glance with trend lines, and you can tap into any of them for more detail — a major step forward from the single static billing screen in the previous app.



Manage TaskBoards the way you'd expect on a phone. Drag cards between columns, reorder them, and browse contacts right from the board.

