Mobile App Tips and Tricks

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Overview

The ServiceMinder mobile app includes shortcuts, device-specific tools, and built-in features that can help you move through your day with fewer taps and stay productive in the field. Some of these features are easy to miss at first, so use this guide to discover a few ways to get more out of the app.

This article will review:

- Work Faster from Your Schedule
- Stay Prepared in the Field
- Use AI to Save Time
- iPhone & iPad Features
- More Useful Things to Know

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.

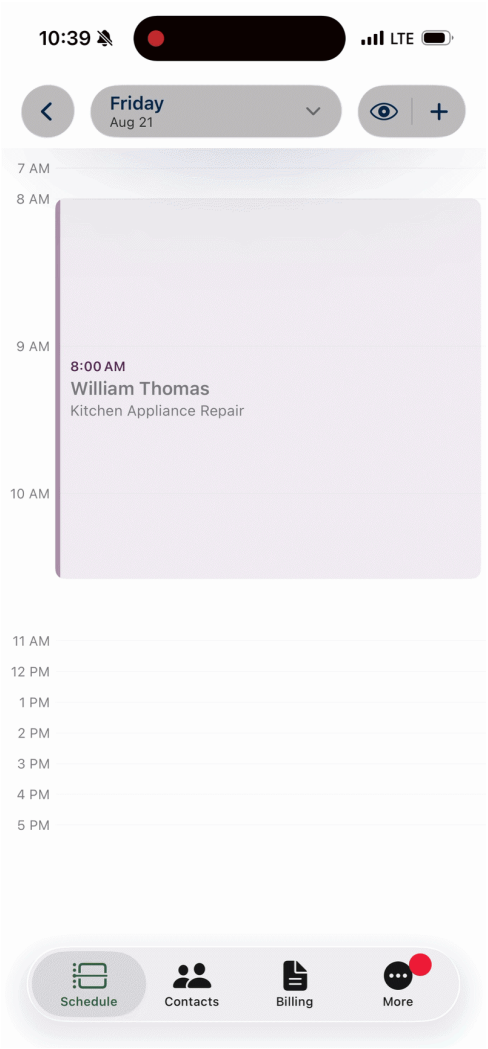
Work Faster from Your Schedule

Press and Hold for Quick Actions

Throughout the ServiceMinder app, you can **long press** certain items to quickly preview information or access additional actions. A long press simply means touching and holding an item on the screen for about a second instead of tapping and releasing it right away.

What happens depends on what you press and hold. For example:

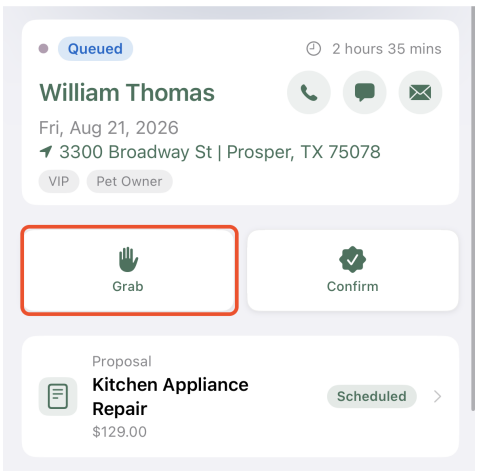
- **Appointments:** Long-press an appointment to access available actions such as **Edit, Transfer, Reschedule, Requeue, Carry Over,** or **En Route**, depending on the appointment's current status. You can also drag appointments directly on the schedule to move them to another time or Service Agent.
- **Contacts:** Long-press a contact card to open a quick preview without fully opening the contact record.
- **TaskBoards:** Long-press a card to access available quick actions, or drag and drop cards between columns to move work through the workflow.



As you move through the app, look for opportunities to press and hold cards and records. It's often a faster way to get to the information or action you needfmove w without opening another screen.

Grab an unassigned appointment

If an eligible queued appointment does not yet have a Service Agent assigned, you may see a **Grab** option. Tap **Grab** to assign the appointment to yourself and add it to your schedule.



Switch tabs without losing your place

Each of the main tabs keeps its own place as you move around the app. For example, you can open an appointment from **Schedule**, switch to **Contacts** to look something up, and then return to Schedule with the appointment still open where you left it.

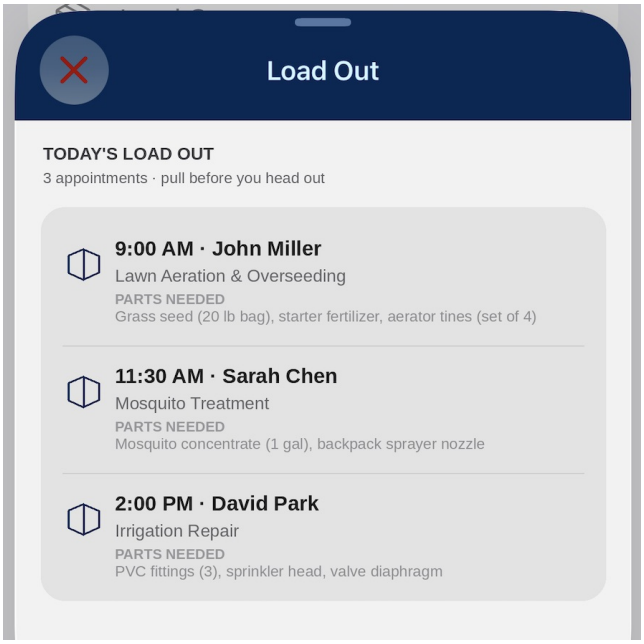
This is especially useful when you need information from another part of ServiceMinder while you're in the middle of working with an appointment.

Stay Prepared in the Field

Check your Load Out before heading out

The first time you open ServiceMinder each day, your **Load Out** will pop up showing the services and parts associated with your scheduled work.

Use it as a quick check before leaving to make sure you have what you'll need for the day's jobs. To review it again later, go to **More > App Features > Load Out**.



Keep working when you lose your signal

ServiceMinder is designed to support key appointment work even when you don't have a reliable connection. You can continue supported actions such as progressing an appointment, adding notes, and working with photos, and the app will sync your changes when connectivity returns.

This can be especially useful when you're working in basements, rural areas, or other places where cellular service may be unreliable.

Take and upload photos more efficiently

When using the in-app camera, 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**.

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 uploading before continuing your work. The native app is also designed to persist background uploads more reliably if the app is no longer active.

If you'd also like photos taken through ServiceMinder saved to your phone, turn on **Save Photos to Gallery** under **More > Preferences**.

Use AI to Save Time

On supported devices, ServiceMinder includes AI tools designed to reduce manual typing and help you quickly understand customer and appointment information.

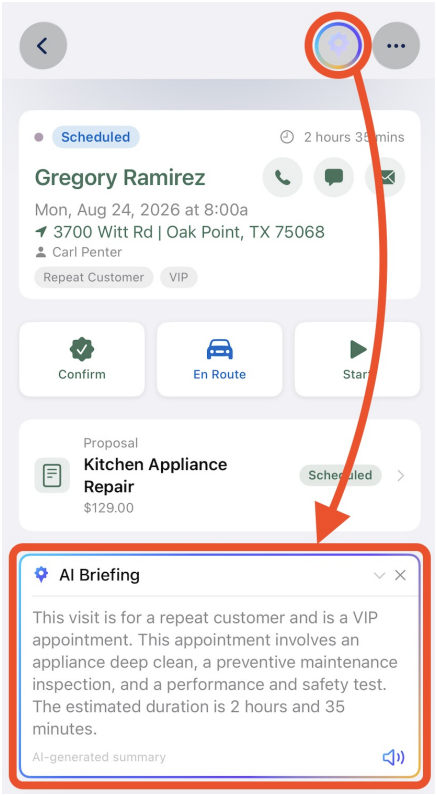
To enable AI features, navigate to **More > Feature Toggles.**

> **Note:** AI features are currently in beta. These features are still being refined, and their functionality and availability may change as improvements are made.

Get briefed before a job

Use **Appointment Briefing** from an appointment to get a quick summary of important information before you arrive. The briefing pulls together relevant context, such as notes, custom fields, and flash messages, so you can prepare for the job without digging through the entire record.

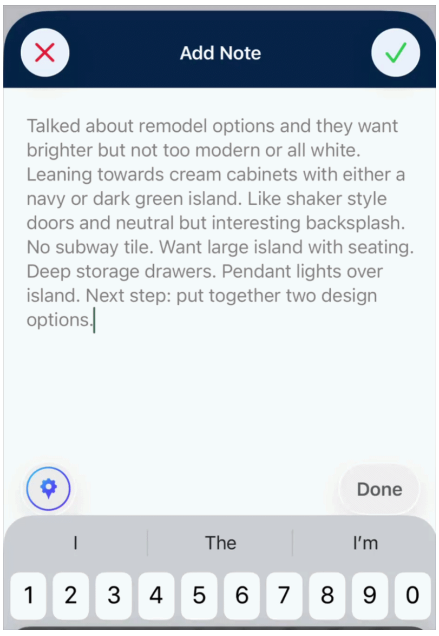
On an appointment details page, click the ServiceMindericon at the top of the page to generate the summary.



Polish your notes

Note Polish is available across multiple areas of the app, including appointment notes, finish and close-out notes, proposal and invoice notes, task descriptions, and checklist notes.

When typing in a supported field (i.e., notes) tap the ServiceMinderlogo icon above the keyboard to clean up rough field notes into clearer, more professional text.



Fill out forms from a quick description

On supported create screens, **Fill with AI** lets you describe what you want to create in everyday language. For example: "Appointment for John Smith tomorrow at 3 for a bug spray."

ServiceMinder uses your description to populate the appropriate fields on the form. Fill with AI can be used when creating an **appointment, proposal, invoice, or asset**. *Always review the populated information before saving the record.*

Summarize longer notes

AI Note Summarization can condense notes associated with appointments, proposals, invoices, and contacts into a shorter summary, making it easier to quickly understand previous activity.

On supported devices, the summary can also be read aloud.

> AI availability depends on the device you're using.
>
> - **iPhone:** supported AI features require an **iPhone 15 Pro or newer running iOS 26 or later with Apple Intelligence enabled**. If your device doesn't meet those requirements, the AI features won't appear.
> - **Android:** supported newer Google Pixel and Samsung Galaxy devices can process AI features directly on the device. Other Android devices may use an online AI service instead, which means an **internet connection may be required.**

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iPhone & iPad Features

Some ServiceMinder features are designed specifically for Apple devices.

iPhone

Keep your active job on your Lock Screen

Turn on **Live Activity** to see progress for your current job directly from your Lock Screen and, on supported devices, the Dynamic Island.

This makes it easier to keep an eye on your active appointment without repeatedly reopening ServiceMinder. You can manage Live Activity under **More > Feature Toggles**.

Use Siri with ServiceMinder

ServiceMinder supports Siri for selected hands-free actions, such as checking your next appointment or beginning to create a new appointment without first opening the app.

Enable **Siri Shortcuts** under **More > Feature Toggles**.

Log in with Face ID

Enable **Face ID** under **More > Security** to access ServiceMinder without entering your password each time.

Use Light Mode or Dark Mode

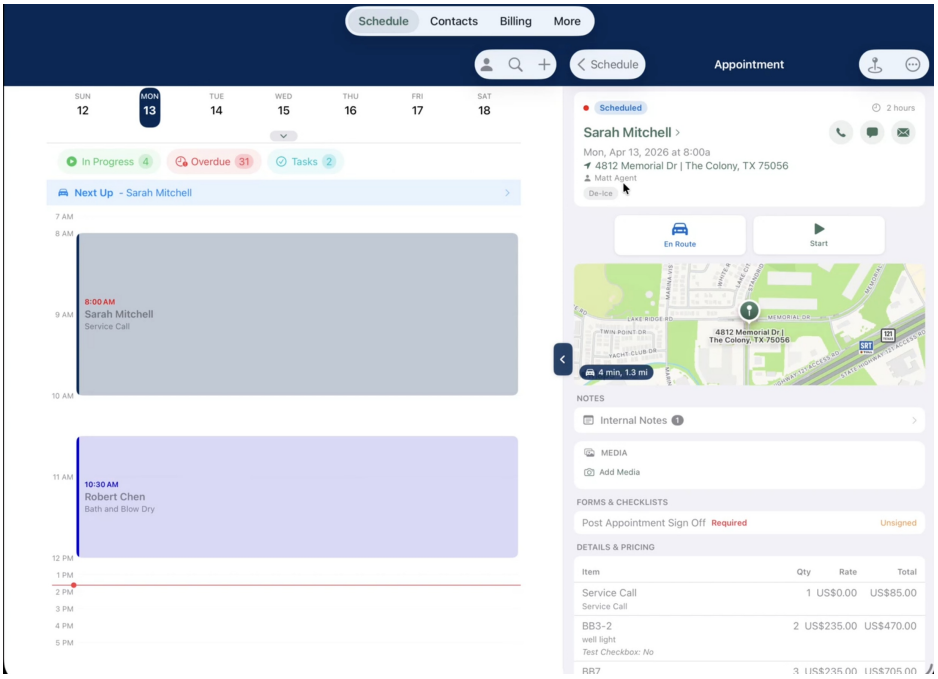
In **More > Preferences**, you can choose whether your ServiceMinder app displays in Light Mode, Dark Mode, or follows your device's system settings. This helps make make the app easier on the eyes, whether you're in a bright truck cab or a dim attic.

iPad

ServiceMinder takes advantage of the larger iPad screen rather than simply displaying a larger version of the phone layout.

See more information side by side

Major areas of the app use split-view layouts so you can keep related information visible at the same time. For example, **Schedule** can display the timeline alongside appointment details, while**Contacts** can keep the contact list and detail information visible together. Forms can also adapt to use multiple columns on the larger screen.



Manage schedules more visually

The iPad scheduling experience includes additional tools designed for working across multiple appointments and Service Agents, including drag-and-drop scheduling, expanded team schedule views, and a map with drive-time and route information.

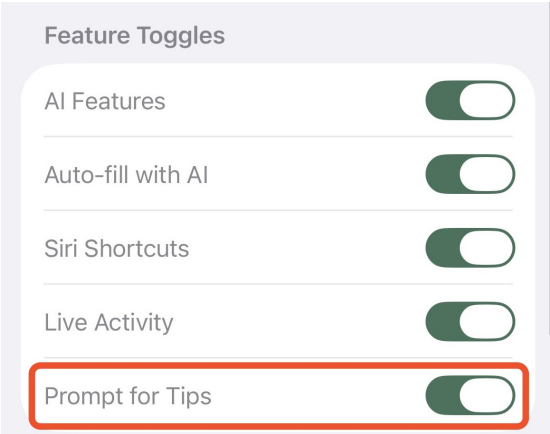
These views can be particularly useful for dispatchers, managers, and other users who manage work across a team.

More Useful Things to Know

Accept tips from customers

If tipping is enabled for your organization, customers can add a tip as part of the payment experience at the end of a job.

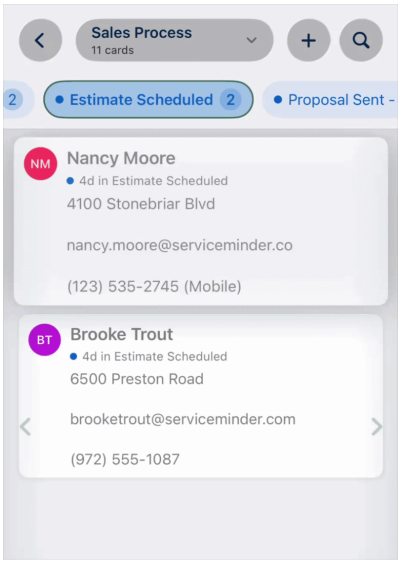
Tips can be enabled in the mobile app in the**More** tab under **Feature Toggles**.



Move Work Through TaskBoards

If your organization uses **TaskBoards**, the mobile experience makes it easy to update where work stands without opening and editing each record individually.

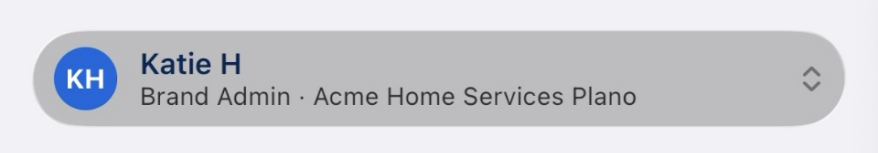
Drag and drop cards between columns to move appointments, contacts, and proposals through your workflow. You can also **long-press a TaskBoard card** to access available quick actions.



Taskboards only appear if they have been configured for your organization and you have been granted permission to view them..

Switch organizations

If your user belongs to more than one organization, the current organization appears at the top of the **More** tab.

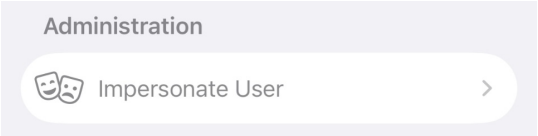


Use the organization drop-down to switch between organizations without signing out. Before creating or

updating information, make sure you're working in the correct organization.

Impersonate another user

Users with the appropriate **Impersonation** permission may see an **Administration** section under **More**. From there, you can impersonate another ServiceMinder user within your brand to view the app as that user.



This feature is typically intended for users with elevated administrative permissions and won't appear for everyone.

Use ServiceMinder in Spanish

If your device language is set to Spanish, the supported ServiceMinder app experience automatically displays in Spanish when you sign in. No additional setting is required inside ServiceMinder.