

Communicating with Customers in the Mobile App

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Overview

The ServiceMinder mobile app keeps common customer communication close to the work you're already doing. You can let a customer know you're on the way, call or email them without searching for their contact information, and—if your organization uses Two-Way Texting—send and receive text messages through ServiceMinder.

Communication shortcuts are available in several places throughout the app, so you don't always have to return to the contact record just to reach the customer.

This article will review:

- Let Customers Know You're on the Way
- Call, Text, or Email from the Record You're Working In
- Use the Texting Hub
- Automatic Replies and Texting Preferences



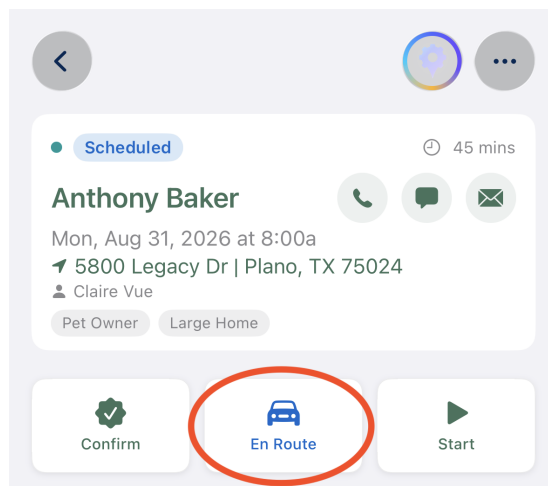
Note: The communication options you see may vary based on your user permissions, organization configuration, customer communication preferences, and whether your organization uses Two-Way Texting.

Let Customers Know You're on the Way

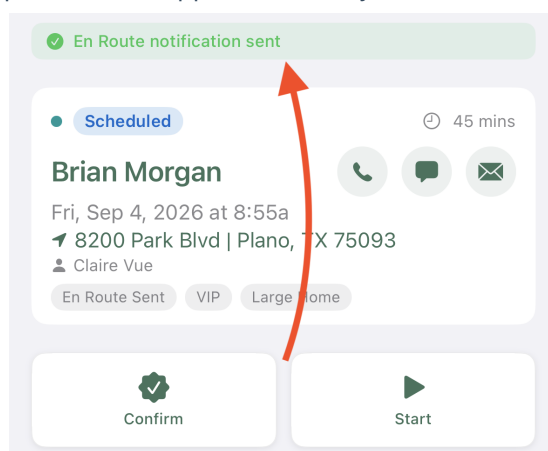
Use **En Route** when you're heading to an appointment and want to let the customer know you're on the way. The En Route action appears as part of the appointment's phase-based quick actions.

To send an En Route notification:

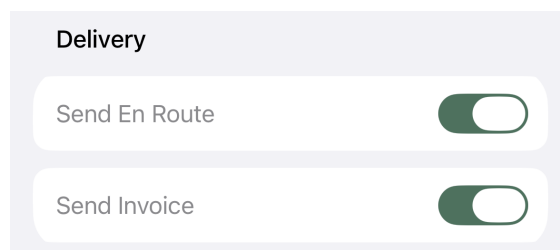
1. Open the appointment you're heading to.
2. Tap **En Route**.
3. ServiceMinder sends the notification configured for that appointment.



Depending on the appointment setup, the En Route notification may be sent by **text, email, or call**. After you send it, a confirmation appears on the appointment so you know the notification went out.



Heading to another job next? When you finish an appointment, the Finish sheet includes an option to send **En Route** to your next appointment. This lets you notify the next customer as part of wrapping up the current job rather than returning to the next appointment first.



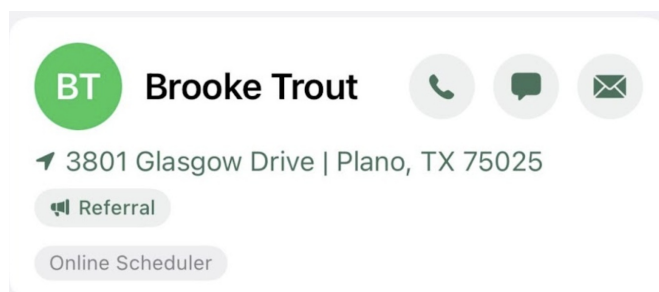
Call, Text, or Email from the Record You're Working In

You don't have to return to the customer's contact record every time you need to reach out. Communication quick actions are available throughout the mobile app so you can contact the customer from the record you're already working with.

Where you're working	Available communication actions
Contact	Call, Text, Email
Appointment	Call, Text, Email

Where you're working	Available communication actions
Proposal	Call, Email
Invoice	Call, Email

On a contact record, these options are available from the **three-dot menu** along with other actions such as getting directions, adding a note, or editing the contact.



Call a Customer

Tap **Call** from an available quick-action menu to place a call using your phone's native calling experience.

Email a Customer

Tap **Email** to begin a message to the customer's email address. Your device's email app opens with the customer already selected as the recipient.

Text a Customer

If your organization uses **Two-Way Texting**, tap **Text** from a contact or appointment to open the customer's ServiceMinder text conversation. Because the conversation is handled through ServiceMinder, replies can be reviewed by your team rather than remaining only on an individual Service Agent's phone.

Use the Texting Hub

Two-Way Texting is an optional add-on that gives your organization a dedicated phone number for texting customers. Unlike a one-time notification, it supports ongoing conversations so customers can reply and your team can continue the conversation from ServiceMinder.

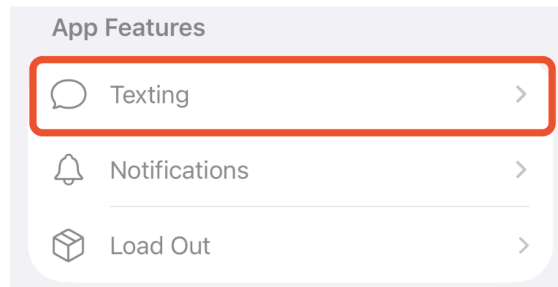
If Two-Way Texting is enabled, you can start a conversation from a contact or appointment or open the **Texting Hub** to manage conversations across the organization.



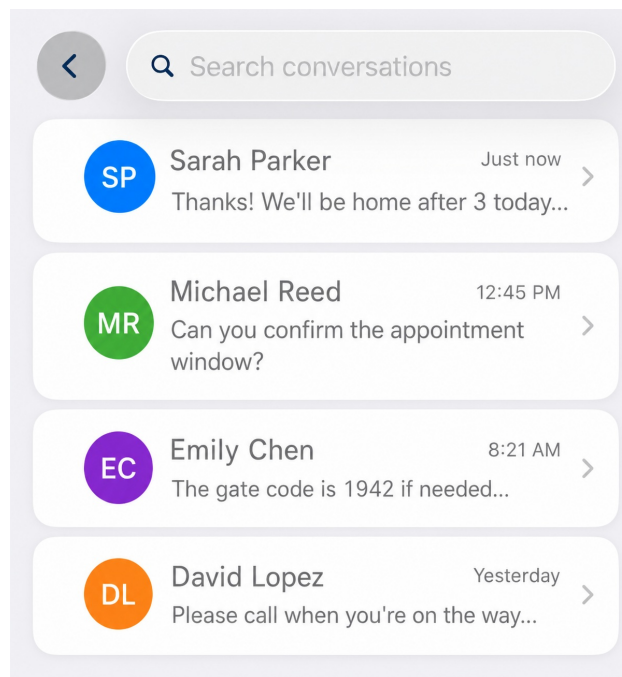
Note: If you don't see texting options or the Texting Hub, your organization may not have Two-Way Texting enabled or your user may not have access to it. Check with your administrator.

The **Texting Hub** gives you one place to review and respond to customer text conversations.

In the mobile app, go to **More > App Features > Texting**.



The Texting option opens your ServiceMinder text conversations. Tap a conversation to review the message history and send a reply.



Automatic Replies and Texting Preferences

Automatic Replies

If your organization uses Two-Way Texting, ServiceMinder can automatically respond to certain keywords customers send to your organization's texting number.

Customer texts	What they receive
HELP	Organization contact or help information
INFO	Organization contact information
NEXT or NEXT APPT	Their next scheduled appointment
WHOAMI	Their name and contact information on file

These requests are handled automatically, so your team doesn't need to respond manually.

When a Customer Opts Out

Customers can opt out of Two-Way Texting by replying with supported opt-out keywords such as **STOP**, **STOPALL**, **UNSUBSCRIBE**, **CANCEL**, **END**, or **QUIT**.

Once a customer has opted out, ServiceMinder stops sending messages to that number through the Two-Way Texting service. Respecting those preferences is important for messaging compliance, so don't try to work around an opt-out by repeatedly sending messages through another ServiceMinder texting workflow.
