

What's New in ServiceMinder: October 14, 2026

10/09/2026 12:55 pm CDT



The updates described in this article will be available on **Wednesday, October 14, 2026**.

Pre-selected and Required Options on Proposal Templates

What's Changing

Proposal Templates now have the same **Pre-selected** and **Required** controls you already use on an individual proposal. Set them once on the template, and every proposal, appointment, or online booking created from it starts with those settings.

Pre-selected	Required	Options Summary
☐	☐	Kitchen
☐	☐	Bathroom

Typing a new option name adds it to the summary above.

In the Online Scheduler, customers see exactly what's in a package:

- **Included** items are always part of the booking and the price, with no checkbox.
- **Optional add-ons** are the choices the customer can make. Pre-selected options start checked, and the customer can uncheck them.

Appointment

Send your technician

2 Service
Select the service you want performed

3 Schedule
Select from the available dates and times

Service
I need and see your personalized pricing.

One Time Clean w/ Bath & Kitchen
test for via appt scheduling
\$1,679.00

- ✓ **One Time**
One Time
- ✓ **Lawn Mower**
Zero turn lawn mower.
- ✓ **Bathroom**
Full bathroom clean, including deep scrub of all wet surfaces.
- ✓ **Kitchen**
Clean full kitchen including stove, oven and major appliances.

Customize your One Time Clean w/ Bath & Kitchen plan 2 added

INCLUDED

One Time	\$1,500.00
Lawn Mower	\$0.00
Bath Bathroom	\$100.00
Kitchen Kitchen	\$79.00

OPTIONAL ADD-ONS

- ✓ **Walls**
Walls +\$39.50
- ✓ **Bonus Rooms**
Family Room/Bonus +\$20.00

Summary

One Time (1250 x \$1.20)	\$1,500.00
Lawn Mower	\$0.00
Bath	\$100.00
Kitchen	\$79.00

If you've been re-setting options on each proposal, or you sell packages online and want customers to see everything that's included, this takes care of it.

Where to Find It

Open a Proposal Template in **Control Panel > Parts/Add-Ons > Templates**. Once your template has option groups, use the Options Summary to mark each option Pre-selected or Required. Pre-selected and Required on templates are available to organizations using the new customer experience.

Learn more in Proposal and Project Templates, Proposal Options, and Booking Packages and Add-Ons in the Online Scheduler.

FAQs

Do I need to do anything?

Nothing is required. Existing templates and proposals keep working as they do today, and options you don't mark keep your organization's current default. If you want options to show as Pre-selected or Required on your proposal templates and packages, review your template settings and turn on those boxes where they apply.

When will I see the new template controls?

They will roll out gradually beginning October 14, 2026, for organizations using the new customer experience.

Apple Pay and Google Pay on More Customer Pages

What's Changing

If you use ServiceMinder Pay as your payment processor, your customers can now pay with Apple Pay or

Google Pay in more places throughout the new customer experience. Digital wallets now appear on:

- **Statement payments**
- **Appointment tips**
- **Proposal deposits**, when the customer pays a single deposit to accept

They join invoice and appointment payments, which already offered wallets. Customers get a faster checkout and fewer card numbers to type, and the new pages now line up with what the legacy pages offered.



Good to know: Wallet options don't appear on proposals with a payment plan, or when a customer is only adding a payment method. Those payments need to be saved for later, and a wallet payment can't be saved. Customers can use a card or ACH instead.

Apple Pay and Google Pay are available to organizations using ServiceMinder Pay. Which wallet a customer sees depends on their device and browser, and Apple Pay availability is still being expanded.
