What's New in ServiceMinder: November 11, 2026

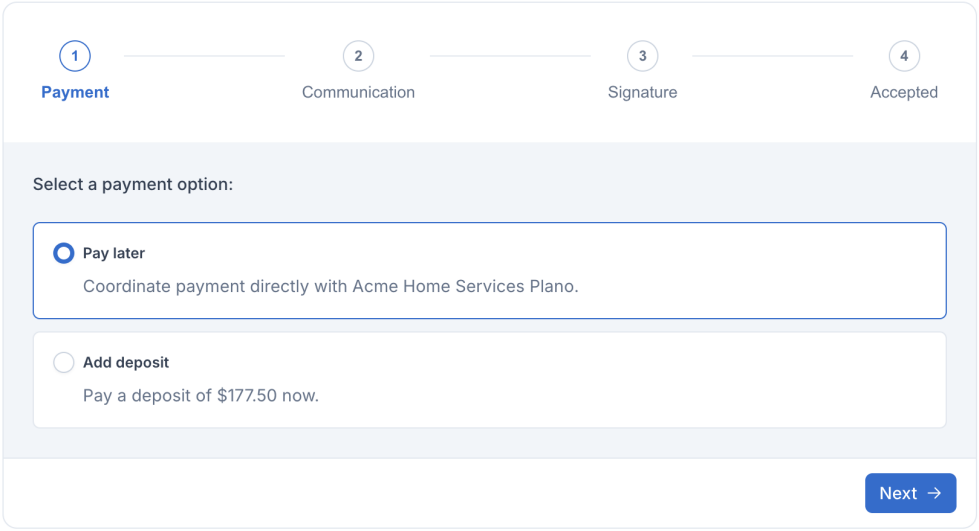
11/06/2026 1:23 pm CST

Customize the Pay Later Option on Proposals

Available now for organizations using the New Customer Experience.

When a proposal includes an optional deposit, customers can choose between**Pay Later** and **Add Deposit**. Previously, the Pay Later option included a description that didn't fit every organization's payment process.

We've updated the default text to **"Pay later: Coordinate payment directly with [your organization]."** You can also customize both the label and description to better reflect how your organization handles payments.

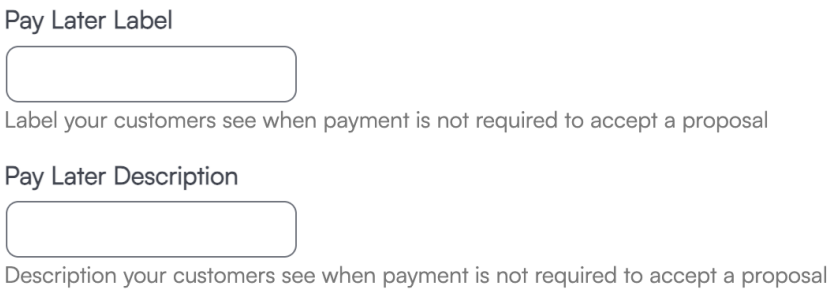


Have something else in mind that you want this option to say? No problem! You can now customize that text to fit your needs.

Where to Find It

Go to **Control Panel > Proposals** and scroll to the **Presentation** section. There, you can customize:

- **Pay Later Label:** Up to 64 characters.
- **Pay Later Description:** Up to 256 characters.



Related Articles

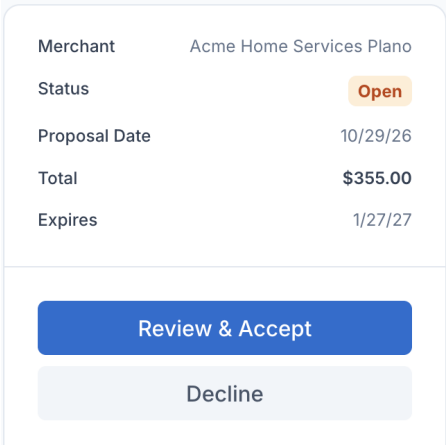
- Proposals Settings
- Proposals in the New Customer Experience
- A New Experience for Your Customers

Proposal Button Now Reads Review and Accept

Available now for organizations using the New Customer Experience.

On the customer-facing proposal page, the **Select Payment Plan** button has been renamed **Review and Accept** to better reflect the next step in the proposal process.

This is a text-only change. Customers will continue through the same guided acceptance process, beginning with their payment options.



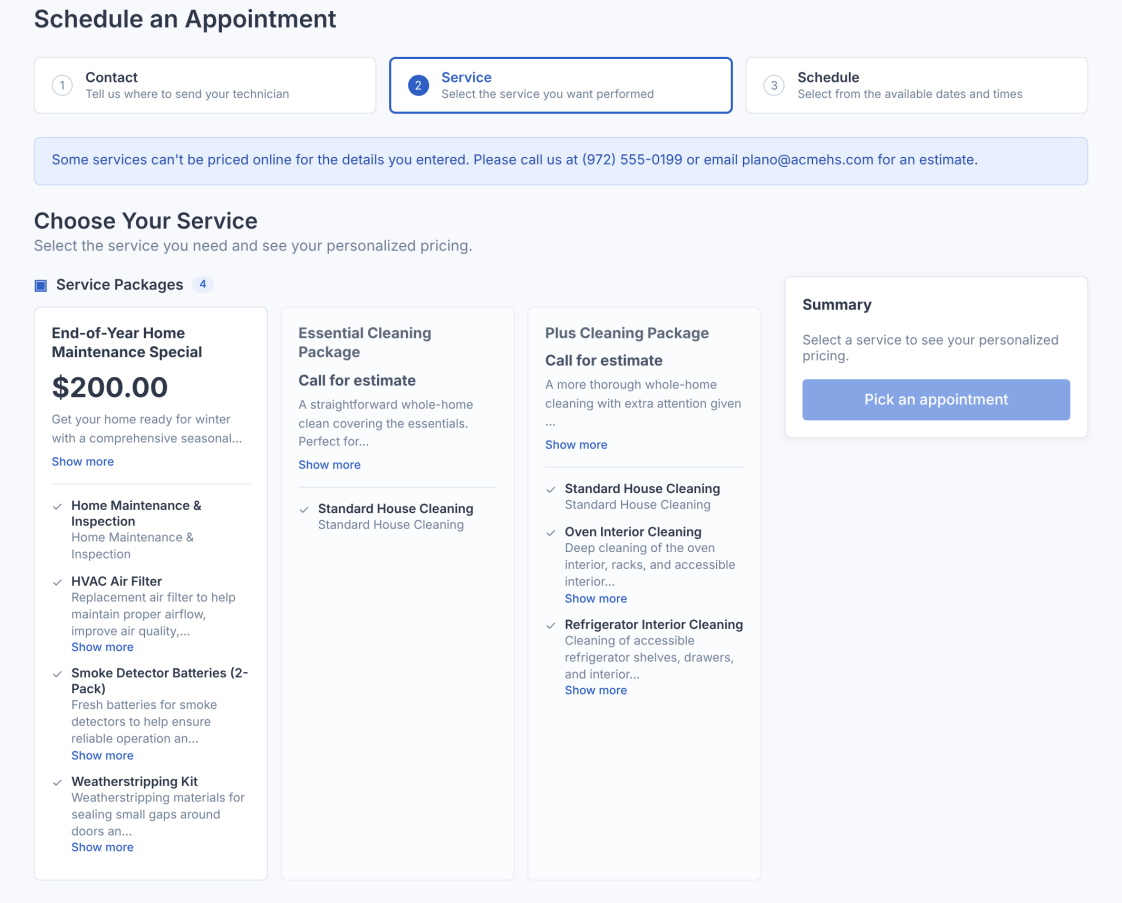
Online Scheduler Shows "Call for Estimate" When a Quantity Is Outside Your Pricing Bands

Available November 11, 2026 for organizations using the New Online Scheduler.

When a service uses pricing bands (such as square footage ranges), customers may enter a quantity that falls outside your configured pricing.

Previously, customers could continue booking without a price. Now, the Online Scheduler will display **Call for estimate** instead of a price, and the service cannot be selected.

A banner will also direct customers to call or email your organization for an estimate. Their contact record will still be created in ServiceMinder, giving you an opportunity to follow up even if they don't reach out.



What You Need to Know

- Customers will be directed to contact your organization instead of booking a service without a price.
- The banner displays your organization's email address and **Self Service Phone Number**, configured under **Control Panel > Scheduling Options**.
- If no Self Service Phone Number is configured, your organization's main phone number will be displayed instead.

Related Articles

- What's New in the Online Scheduler?
- Online Scheduler Configuration
- Pricing Bands

Send Invoice on the Mobile Finish Screen Now Matches the Web

Available in the ServiceMinder mobile app starting November 11, 2026.

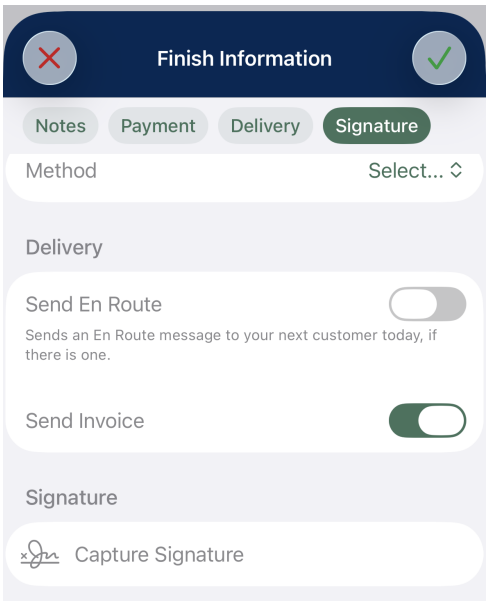
When you finish an appointment in the mobile app, the Send Invoice toggle now follows the same rules as finishing an appointment on the web. If the app can’t send an invoice, it won’t show the toggle, and

nothing goes out.

When You'll See the Send Toggle

The toggle is available when all of the following conditions are met:

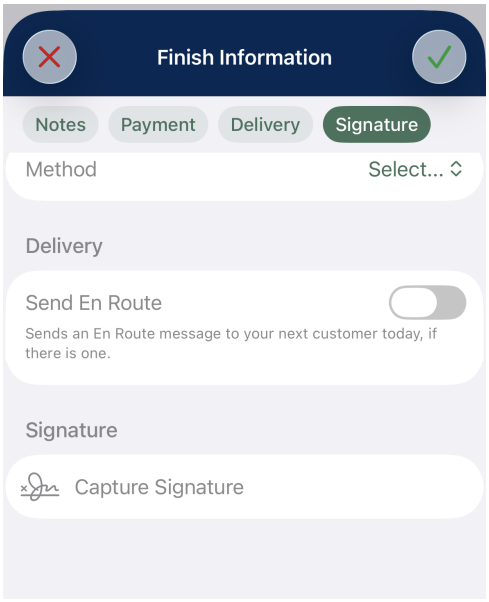
- The team member has permission to send completion emails (`Appointments:Finish:SendCompletion`).
- The billing contact has an email address on file.
- Invoice notifications are enabled for the contact or user.
- None of the invoice exclusions below apply.



When the Send Toggle Is Hidden

The **Send Invoice** toggle will not appear, and no invoice will be sent, if any of the following apply:

- The customer uses consolidated invoicing.
- The customer is enrolled in Auto Pay and has a card on file.
- **Carry Forward** is selected.
- The invoice total is $0.
- The billing contact does not have an email address.
- The service is configured to **Mark Invoices Unapproved**.



When the toggle is available, it's **selected by default**. Team members without permission to view pricing will still see the toggle when invoice sending is allowed.

Related Articles

- Proposals and Invoices in the Mobile App

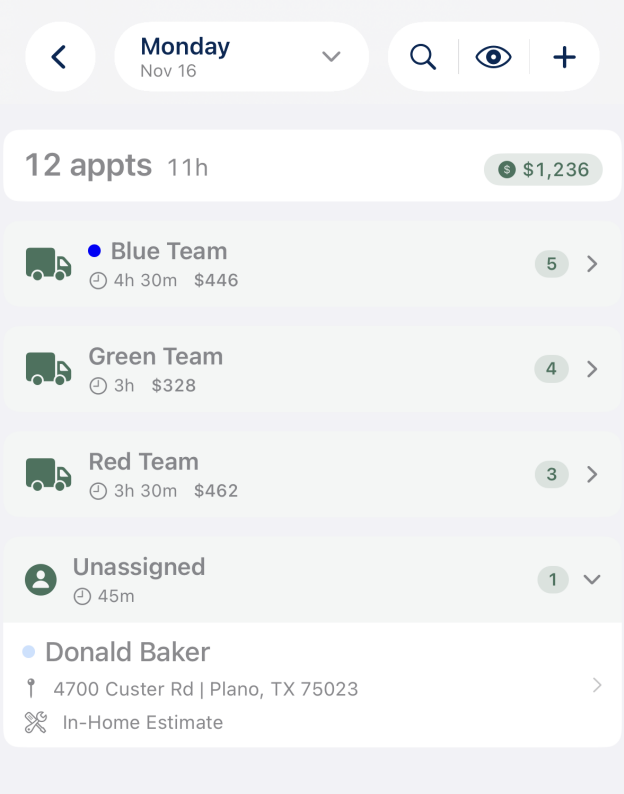
Group Your Mobile Schedule by Team

Available November 11, 2026, in the New ServiceMinder Mobile App for iOS and Android for organizations using Teams.

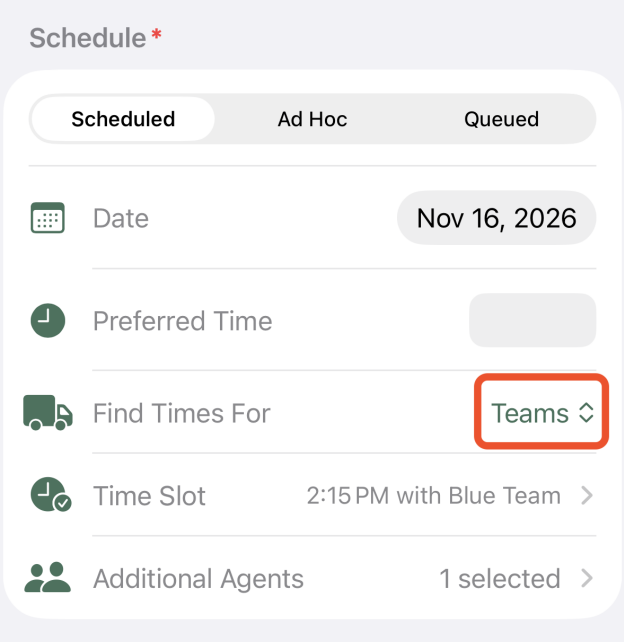
The mobile app now supports grouping schedules by team, just like the web version of ServiceMinder. If your organization schedules multiple Service Agents and equipment together, you can view them as a single team instead of separate schedules for each agent, making it easier to see who's working together and manage your day.

What's Changing

- **Switch between views:** Group All Schedules by individual Service Agents or by Teams.
- **See your crews at a glance:** Each team has its own schedule lane, organized under the team lead, with indicators showing team members and daily totals.

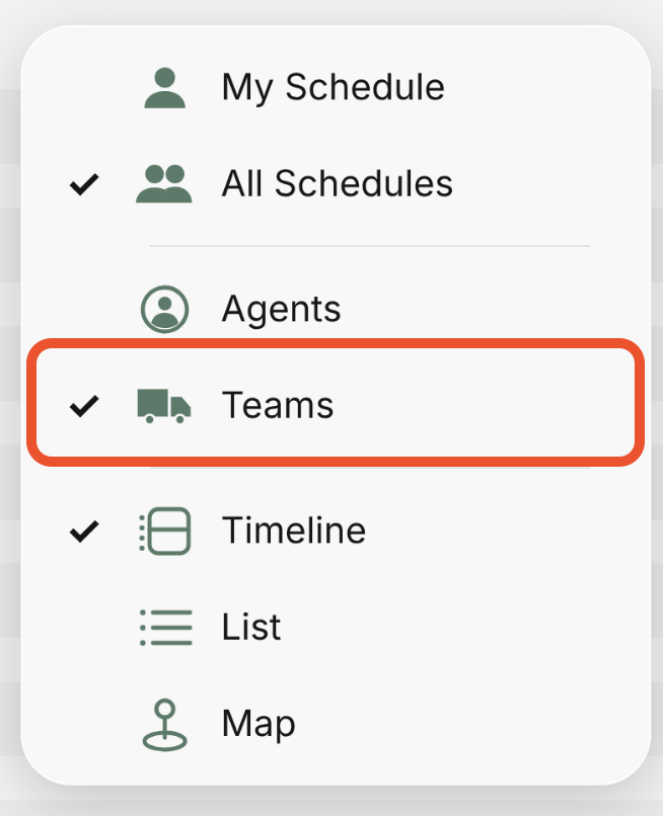


- **Select teams when managing appointments:** Team selection is now available when creating appointments and on the Carry Over and Finish Appointment forms.



Where to Find It

Open **Schedule > All Schedules** in the mobile app and select **Group By Teams**.


My Schedule
All Schedules
Agents
Teams
Timeline
List
Map