2026 Year in Review and What's Next in 2027

11/04/2026 10:32 pm CST

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Summary

This 50-minute webinar from November 4, 2026 covers what ServiceMinder launched this fall and what's planned for 2027. Rachel Sessions hosted, with Rob Smith, Maia Panico, and Benjamin Delecourt presenting. It includes a live demo of the new online scheduler, mobile app, and New Customer Experience pages, a short roadmap preview, and a Q&A.

- *7:51 to 29:00:* Demo of booking, the appointment, and payment with ServiceMinder Pay
- *31:04 to 35:00:* 2027 preview, covering the new web UI (early Q1 into Q2), reporting, permissions and API access, and AI
- *35:22 to 49:15*: Q&A, summarized below

Questions and Answers

Questions were submitted through the Zoom Q&A. Answers below are summarized from the live responses. Questions the team didn't reach are being routed to client success managers for follow-up.

Has the new invoice look and feel been rolled out to all locations, and do franchisors need to take any action?

It's opt-in today. Brands could enable the New Customer Experience pages in Dashboard starting in September, and organizations got the same option in Control Panel a couple of weeks ago. A brand admin or an organization owner can turn the pages on under Experience Settings, and brand admins can enable them for all organizations at once. The plan is for these pages to become the default by the end of the year.

When a technician taps en route, does the customer get a notification from the technician or from ServiceMinder?

It goes through ServiceMinder. If the organization has a two-way texting number configured, the notification is sent from that number, and the text history is available in the Texting tab in the app and from the contact.

Will proposals show the deposit amount due before the customer enters payment information, including when additional deposits are collected after acceptance?

New proposals show the deposit when one is required. In the demo, a proposal with a 25% deposit displayed the amount and marked it as due at that step. The deposit also appears in the acceptance flow, after the customer signs and selects a payment method. Proposals can also collect offline payment

methods such as cash or check, which are configurable in settings.

Are there plans for integrated VoIP, and how does ServiceMinder think about integrations and partners?

Telephony, including text and voice, is on the future roadmap. ServiceMinder will keep investing in the partners it already works with, such as marketing integrations, and in better APIs. In the meantime, if technicians have a VoIP app on their phone, the mobile app offers shortcuts to call the customer through it.

Can Service Agents use the app without Wi-Fi? Some have trouble with connectivity when punching in and out.

Offline workflows are available now for appointments, including starting and ending an appointment and the steps in between. Some features still need a connection, and clock in and clock out may be one of them. A release this morning made it easier for technicians to see whether they're clocked in and to track their own hours, and owners with the right permissions can now see their team's hours.

Will we be able to customize the new invoice view?

Current options are brand colors (the primary call-to-action button, header, and footer), a brand logo, and terms and services. The team is collecting feedback on what other customization or templating brands need, and the new tech stack makes that easier to add.

Can new contact and new appointment notifications from the API be separated? Some users want one but not the other.

The team will take this back to understand the need. This is likely a problem the team wants to solve, but no timeline was given.

Will a read-only API be available?

Yes. ServiceMinder is rebuilding access controls so that user and API permissions are more granular, including which objects and data an API key can reach. Read-only access will be part of that work.

How can we use AI with ServiceMinder today?

Users of the new native app can turn on AI features under the More tab. They are still in beta. Note polishing appears wherever users enter long text or send texts to customers. AI briefings summarize previous notes, contacts, and visits, as well as an individual appointment, which helps on long projects. More AI features are planned for 2027.

Can we adjust the online scheduler's availability or turn it off? We travel up to four hours each way and get requests for next-morning inspections.

Use the lead time days setting in the scheduling settings to set a buffer of one or more days. Dates inside the buffer appear grayed out, so customers can't book them.