



A practical comparison guide to help you decide which new features deserve attention now, which should be planned for later and which may not be relevant to your business.

How to Use This Guide

Start with the business-type comparison, then review the detailed feature tables. Focus on the problem you want to solve rather than activating every available feature. Requirements and availability may depend on your ServiceM8 plan, add-ons, device, location and Security Roles.

Quick Decision Questions

- Where does your team lose the most time: administration, scheduling, communication, pricing or field paperwork?
- Which processes are repeated often enough to benefit from a standard workflow or automation?
- Which staff need access, and what should they be allowed to view, prepare or approve?
- Does the feature require an add-on, compatible device or revised pricing procedure?
- How will you test the change before making it part of your normal process?

Upcoming Events!!

11am Thursday 24th Sep 26



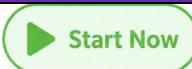
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4pm Monday 28th Sep 26



[Click Here](#) Password: 217376

Priority Guide

Priority	Meaning	Recommended action
 Start Now	Clear benefit with manageable setup	Configure, test with a small group and document the new process.
 Plan Next	Useful, but requires preparation or broader change	Confirm requirements, assign an owner and schedule implementation.
 Optional	Useful only for certain workflows or devices	Activate only when there is a defined business use.
 Not suitable	The requirements are unavailable or the feature does not solve a current need	Do not activate. Review again only if the business need or requirements change.

Implementation Effort Guide

Effort	Meaning
 Low	Quick setting change or brief demonstration
 Medium	Configuration, testing or staff training required
 High	Process mapping, add-ons, data preparation or controlled rollout required

Best Features by Business Type

Business type or situation	Best features to review first	Why they matter
Solo operator	Office Agent, new Booking Experience, Quote and Invoice Preview, Tap to Pay	Reduces office follow-up and helps complete administration while the job is fresh.
Small field team	New Staff Schedule, Staff Chat, Note Threads, Notifications, Full Form Mode	Improves handovers and gives the office a clearer view of work and outstanding actions.
Growing dispatch team	Staff Schedule, Booking Experience, Capacity and Weather, Default Allocation Expiry	Supports more consistent booking decisions as workload and staff numbers increase.
Material-heavy business	Pricing Strategies, Supplier Quote Import, Material History, Bulk Price Increase	Helps control markups, reduce re-keying and understand changes made to job materials.
Quote and proposal focused	Imagine, Bundle Images, Photo Markup, Quote Preview	Makes proposed work easier for customers to understand before approval.
Compliance or WHS focused	Toolbox Meetings, Knowledge, Full Form Mode, Attach Files, Form Photo Picker	Keeps evidence, procedures, meeting records and site documentation connected to the work.
Android or mixed-device team	ServiceM8 for Android, Office Agent, Schedule, Tap to Pay, Barcode Lookup	Reduces device-based workflow differences across the team.
Multiple businesses or accounts	Account Switch, new iPad Experience, custom List Views	Makes it easier to move between accounts and manage information across different operations.
Business type or situation	Best features to review first	Why they matter

Artificial Intelligence and Office Work

Feature	Best for	Main benefit	Before you activate	Priority	Effort
Reports from Plain English	Owners needing answers without building reports manually	Turns normal questions into editable reports.	Review assumptions and confirm the underlying data is complete.	 Start Now	 Low
Office Agent	Teams spending time searching jobs or preparing routine admin	Finds context and prepares supported next steps.	Review access, usage limits and approval responsibility.	 Start Now	 Medium
Office Agent in the App	Technicians needing job context or quick actions on site	Captures information while it is current.	Train staff to review proposed actions before approval.	 Start Now	 Medium
Auto Quote and Invoice	Jobs with reliable time, material and Diary information	Produces a faster first draft.	Staff must verify scope, quantities, pricing and wording.	 Optional	 Medium
Scheduled Tasks	Recurring reviews, follow-ups and Action Required routines	Runs defined reviews consistently on a schedule.	Write clear instructions and test each task before regular use.	 Optional	 High
ChatGPT or Claude Connection	Businesses already using supported AI workspaces	Reduces switching and re-keying for permitted job actions.	Review Security Roles, workspace controls and staff access.	 Optional	 High

Scheduling and Communication

Feature	Choose it when	Value	Requirement	Priority	Effort
New Booking Experience	Office staff struggle to compare bookings, travel and genuine gaps	More realistic appointment choices.	Review booking settings and test common scenarios.		
Capacity and Weather	Workload or outdoor jobs are affected by future conditions	Earlier visibility of pressure points.	Confirm locations, capacity and forecast use.		
Notifications Management	Important updates are being missed	Improves prioritisation of unread work and mentions.	Review notification habits with the team.		
Note Threads and Reactions	Job Diary replies lose their original context	Clearer handovers and accountability.	Explain when to reply, react or create a new note.		
New Staff Schedule	Dispatch needs a clearer view of availability, capacity and overlaps	Better allocation decisions before problems occur.	Confirm staff availability and allocation rules.		
Staff Chat	Operational conversations are split across personal messaging apps	Keeps team and project discussions inside ServiceM8.	Set communication expectations and train staff.		
Send from Own Domain	Customers need clearer email identity and branding	Improves recognition and professionalism.	Website and Email add-on required.		
Toolbox Meetings	The business needs searchable meeting records and actions	Retains audio, transcript, summary and actions.	Knowledge add-on required.		

Materials Pricing and Payments

Feature	Best fit	Main benefit	Requirement or caution	Priority	Effort
Job Material History	Teams where several people or integrations edit billing	Provides an audit trail of additions, changes and removals.	Review access for staff handling pricing.		
Card Payment Limit	Businesses concerned about fees on large invoices	Directs larger payments toward lower-cost methods.	Choose a threshold that matches your payment policy.		
Bulk Price Increase	Businesses needing a broad percentage adjustment	Updates saved prices with a preview.	No automatic undo; existing jobs and documents are unchanged.		
Pricing Strategies	Businesses using repeatable material markup rules	Keeps selling prices consistent as costs change.	Requires Markup Billing. Test rules on a sample first.		
Supplier Quote Import	Businesses estimating from supplier quotes	Reduces manual entry and supports Bundles.	Requires Supplier Invoice Import add-on.		
Supplier Price Lists	Businesses receiving regular supplier price files	Updates costs and applies pricing rules at scale.	Requires Automated Supplier Import.		
Bundle Images	Businesses using option-based Proposals	Helps customers distinguish and compare choices.	Currently most useful in Proposals.		

Field Mobile and Visual Tools

Feature	Best for	Main benefit	Device or setup note	Priority	Effort
Full Form Mode	Inspections completed in a practical site order	Shows all questions and allows flexible completion.	Test existing Forms before team rollout.		
Search Forms	Accounts with many Form templates	Finds the correct Form faster.	Use clear Form names and categories.		
Attach Files	Site documents received or created on mobile devices	Keeps the Job record complete before staff leave site.	Confirm staff attachment permissions.		
Form Photo Picker	Photo-heavy inspections and reports	Makes the correct evidence easier to select.	List, Grid and Large previews available.		
ServiceM8 for Android	Android or mixed-device field teams	Supports far more day-to-day ServiceM8 workflows.	Check device support for payment and scanning functions.		
Imagine	Sales conversations where customers need help visualising a result	Creates an AI concept from a job photo.	Present outputs as concepts, not guaranteed final results.		
Photo Markup	Defects, instructions, scope and measurements	Adds visual explanation to job photos.	Available on iOS and ServiceM8 Online.		
Room Scan Wall Colours	Businesses reviewing interior spaces later	Creates more recognisable 3D scans.	Requires a compatible LiDAR-equipped iPhone or iPad.		
Apple Watch	Field staff who need quick job actions without reaching for a phone	Supports job details, voice Notes and common time actions.	Requires a paired iPhone.		

Implementation Effort Comparison

Setup effort depends on the complexity of your existing account. The ratings below are a practical guide rather than a guarantee.

Effort	Typical features	What is usually required
Low	Hide completed tasks, Note reactions, Form search, Quote preview, expanding Notes	Update the app, demonstrate the feature and confirm staff understand the change.
Medium	Staff Schedule, Staff Chat, Toolbox Meetings, Android rollout, Imagine, card-payment limits	Confirm permissions, document the workflow, test with selected staff and provide training.
High	Scheduled Office Agent tasks, AI connections, Pricing Strategies, supplier imports, private add-ons	Map the current process, confirm data and requirements, configure carefully, test exceptions and assign ongoing ownership.

Recommended Rollout Order

1. Activate ServiceM8 15 and update supported devices.
2. Review Security Roles, add-ons and device requirements.
3. Choose one or two high-value features linked to a real business problem.
4. Configure and test the workflow with a small group.
5. Train the staff who will use or approve the process.
6. Review the result before expanding the rollout.

Important Notes

Feature availability, plan inclusions, add-ons, fees and device support can change. Confirm current requirements with ServiceM8 before purchasing, activating or relying on a feature. AI-generated content and actions should be reviewed by an authorised person. Accounting, legal, safety and compliance decisions should be confirmed with an appropriately qualified professional.

Australian Payment Action

From 1 October 2026, ServiceM8 will stop adding card-processing surcharges to payments accepted through ServiceM8 Pay and the legacy Stripe Payments add-on in Australia. Card-processing fees will still apply to the business. Review pricing, PayTo, card-payment limits and other payment options before the deadline.

Your Feature Selection Worksheet

Use this worksheet during an internal review or a session with The 2 Kims.

Business problem	Feature	Owner	Priority	Effort	Next action

Final Checklist

- ☐ The feature solves a defined business problem.
- ☐ Plan, add-on and device requirements have been confirmed.
- ☐ Security Roles and approval responsibilities have been reviewed.
- ☐ Existing data, templates or pricing rules are ready for the change.
- ☐ The workflow has been tested using realistic examples.
- ☐ Affected staff have been trained.
- ☐ A date and owner have been assigned for the post-rollout review.

Need Help Choosing

The 2 Kims can review your current ServiceM8 account, identify which features are most relevant, confirm setup requirements and prepare a staged implementation plan. We focus on practical improvements that match the way your business actually operates.

Recommended next step: Book a ServiceM8 15 Update Review or Full Account Review.