



SERVICEM8 15 IS HERE!!!

But activating the update is only the beginning.
The 2 Kims can help you select, configure and implement the features that will genuinely improve your business.

We help you work out **what matters**, **set it up correctly**, **train your team** and make sure it **improves the way your business operates**.

 **PLAN WHAT MATTERS**
 **SET UP CORRECTLY**
 **TRAIN YOUR TEAM**
 **SEE A REAL IMPACT**

THE 2 KIMS

Client Update Guide | September 2026

ServiceM8 15 is live. Here's what actually changes for your business and what you need to do before **1 October** if you're in Australia.

HOW TO UPGRADE

Desktop App	Download the latest ServiceM8 desktop app for Mac or PC
Desktop Online	Click HERE and select "Activate ServiceM8 15" this is located under the video. Then login your ServiceM8 account. Go to Settings and select "Activate ServiceM8 15" at the top of the page. You will need to log out and log back in before the update will be visible.
Mobile App	Update the ServiceM8 app through the Apple App Store or Google Play Store.

NEXT STEPS

- **Review** this document and identify the features relevant to your business.
- **Activate** ServiceM8 when you are ready as per our instructions
- Call us or jump on our website to **Book an Appointment** to customise the new features.
- Join one of our **FREE** online sessions where we discuss the new features of ServiceM8 15.

The 2 Kims

REAL PEOPLE. REAL SOLUTIONS. A BRIGHTER BUSINESS.

NEW WEBSITE NOW LIVE



Dedicated SERVICEM8 15 Page

Visit The 2 Kims online for updates, insights and support around the latest **SERVICEM8 15** release.

We help you understand what matters, set it up correctly, train your team and make it work for your business.

[VIEW SERVICEM8 15 PAGE →](#)
www.the2kims.com.au


INSIGHTS THAT MATTER



SET UP CORRECTLY



TRAIN YOUR TEAM



REAL RESULTS FOR YOUR BUSINESS



SERVICE M8 DONE PROPERLY

We help trade and service businesses get the most out of ServiceM8 with clean setup, better processes and real support – so you can work smarter, not harder.

[GET THE MOST OUT OF SERVICEM8 →](#) [SEE HOW WE HELP →](#)

 **SET UP FOR SUCCESS**
Get ServiceM8 working properly from day one.

 **REAL TRAINING**
Practical, hands-on training for you and your team.

 **ONGOING SUPPORT**
We're with you for the long term. Help, real results.

WON'T YOUR SOFTWARE REAL RESULTS?

Trade Businesses Do Better With The 2 Kims

SAME TOOLS. A BRIGHTER BUSINESS.

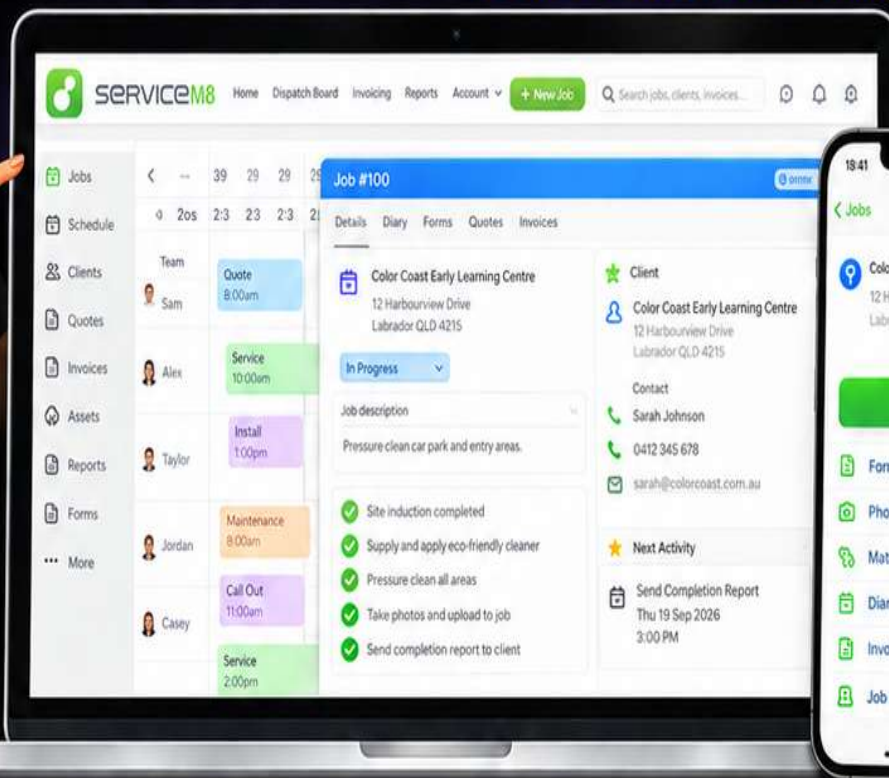
The 2Kims | CLIENT UPDATE SERIES

ServiceM8 15

ServiceM8 15

at a Glance

Smarter tools. Less admin. **Better-connected teams.**



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SMARTER AI

Office Agent, Scheduled Tasks, Auto Quote/Invoice, Approval Actions, Reports and ChatGPT/Claude connections.

2



BETTER SCHEDULING

A redesigned Staff Schedule improves visibility of bookings, availability, travel and future capacity.

3



TEAM COMMUNICATION

Staff Chat, threaded Job Diary Notes and improved notifications make internal communication easier to manage.

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MATERIALS & PRICING

New supplier and pricing tools help businesses keep costs and selling prices more consistent.

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BETTER FIELD TOOLS

Forms, photos, files, materials and mobile workflows have all been improved.

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ANDROID EXPANSION

Android users gain significantly more ServiceM8 functionality for day-to-day field operations.

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VISUAL TOOLS

Imagine and Photo Markup help teams create clearer visual information for customers and jobs.

8



PAYMENTS

ServiceM8 Pay changes affect processing rates and, importantly for Australian businesses, card surcharges from **1 October 2026**.

PEOPLE + SYSTEMS + A BRIGHTER BUSINESS

That's The 2Kims Advantage.

SMARTER AI

ServiceM8 15 introduces Office Agent - a built-in AI assistant that helps your team find information, prepare work and run recurring admin tasks. Proposed changes are reviewed and approved before they are applied.

Plan & Usage Note: Office Agent access, included usage and additional usage charges depend on your ServiceM8 subscription and Office Agent plan.

CONNECT SERVICEM8 TO CHATGPT OR CLAUDE

ServiceM8 can connect to supported AI assistants such as ChatGPT and Claude using live ServiceM8 business context.

Depending on permissions and available tools, connected AI can search and read Job information, check staff availability, create and schedule Jobs, add notes, change Job status and prepare job-linked communications.

- Search for clients and jobs
- View detailed job information
- Read Job Diary entries, activities and notes
- Check staff availability
- Create and schedule jobs
- Add notes and change job status



Important: Access and available actions depend on ServiceM8 permissions, AI platform settings and workspace controls.

Benefit: Reduces double handling by allowing supported AI tools to work directly with permitted ServiceM8 information and actions.

Permissions: Review Security Roles before rollout and only enable AI access for staff who require it.

SCHEDULED TASKS	AUTO QUOTE AND INVOICE	APPROVAL ACTIONS
Set recurring Office Agent tasks with instructions, schedules and notifications, then review proposed actions before approving them. Benefit: Recurring office routines can run consistently without relying on someone remembering each step.	Ask Office Agent to prepare a Quote or Invoice using Job details, recorded work and relevant Knowledge, then review the draft before approval. Benefit: Faster first drafts reduce re-keying while keeping staff responsible for the final pricing and content.	Review proposed Office Agent actions in chat or the Job Diary, then approve or decline each action before it is applied. Benefit: Teams gain AI-assisted speed while retaining human control over changes to ServiceM8.
REPORTS FROM PLAIN ENGLISH	MORE POWERFUL AI CONNECTIONS	OFFICE AGENT IN THE APP
Ask Office Agent for a report using normal language, review the results and assumptions, then open it in Report Explorer for further editing. Benefit: Business questions can become useful reports without building them manually.	Connect ChatGPT or Claude to ServiceM8 to search, read and perform supported Job actions using live ServiceM8 context. Benefit: Reduce switching and re-keying when using AI for repeatable administration.	Talk to Office Agent from an open Job in the ServiceM8 app. Ask questions, give instructions and review supported actions before approving them. Benefit: Field staff can capture and act on Job information while it is fresh, reducing follow-up office admin.

BETTER SCHEDULING

A redesigned Staff Schedule improves visibility of bookings, availability, travel and future capacity. It gives your dispatch team a clearer picture of capacity, overlaps and travel.

Important - The redesigned Staff Schedule is now available within the Dispatch Board. If your business relies on established dispatch or booking workflows, test the new Schedule with a small group before changing your team's standard process.



The Staff Schedule has been redesigned to give your office a clearer picture of what's booked, who's available and where the pressure points are - before problems happen.

What's improved:

- Multiple schedule views with staff filters
- Capacity and weather visibility
- Travel time shown at the point of booking
- Clearer overlap handling
- Scheduled messages visible from the Job Card
- Recurring job search by address or category

The strongest use is at the start of the day. Open the Staff Schedule each morning, check capacity across the week, identify any gaps or clashes before confirming new bookings.

NEW STAFF SCHEDULE Use day, week and month views with staff filters, capacity, weather and clearer overlap handling. Benefit: Dispatchers spot pressure points and make better allocation decisions earlier.	NEW BOOKING EXPERIENCE See available slots, existing appointments and travel time together before confirming the job. Benefit: More context at booking helps avoid clashes and unrealistic travel gaps.	DEFAULT ALLOCATION EXPIRY Set a default expiry for Job Allocations, while retaining the option to change it when needed. Benefit: Consistent settings remove a small but frequent scheduling decision.
HIDE COMPLETED TASKS Remove finished tasks and checklist items so the team focuses on what remains. Benefit: A cleaner checklist makes remaining work easier to understand at a glance.	SEARCH RECURRING JOBS Find recurring work using the service address or job category. Benefit: Regular work is quicker to locate when a customer calls or a visit need changing.	AUTOMATIONS MINI TAB See scheduled customer messages directly from the Job Card. Benefit: Everyone sees what communication is due without opening a separate workspace.
CLEARER CLIENT JOB HISTORY Improved descriptions and status indicators when reviewing previous work for a client. Benefit: Staff understand the customer relationship before speaking with them or attending site.	DAY NAMES IN MESSAGES Add the weekday alongside the appointment date in email and SMS templates. Benefit: Clearer appointment wording reduces confusion and unnecessary confirmation calls.	CAPACITY & WEATHER VISIBILITY See upcoming capacity and weather conditions alongside your schedule to plan ahead. Benefit: Spot potential weather-affected days before allocating outdoor work.

TEAM COMMUNICATION

Staff Chat, threaded Job Diary Notes and improved notifications make internal communication easier to manage. ServiceM8 15 brings communication tools inside the platform - so conversations, updates and procedures stay connected to the jobs they relate to.

Permissions: Review Security Roles before rollout. Use private Staff Chat channels for sensitive conversations, and configure Knowledge Section access so only the appropriate roles can view or edit restricted content.

Keeping the team connected used to mean juggling ServiceM8, a messaging app and someone's memory. Staff Chat, threaded notes and Knowledge improvements change that.

What's improved:

- Direct messages and group channels inside ServiceM8
- Job Diary replies threaded to the right note
- Mention teammates directly in notes
- Notifications redesigned for clarity
- Send emails from your own domain
- Procedures and toolbox meetings stored in Knowledge

The strongest use is during handovers. When a job changes hands, the incoming tech opens the Diary, reads the thread, sees who said what and what's still pending - without making a single phone call.



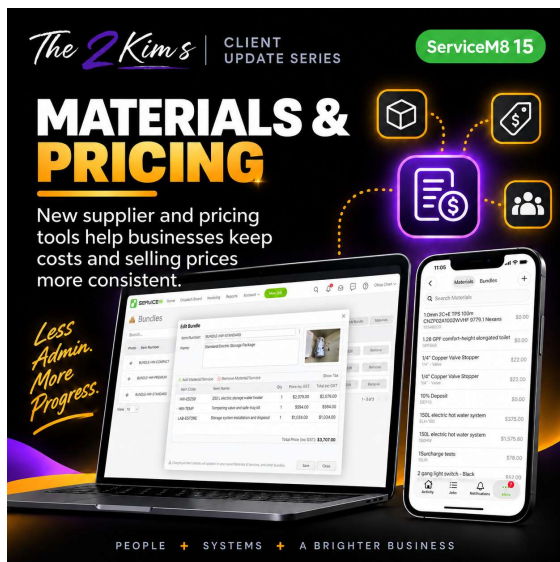
STAFF CHAT	NOTE THREADS & REACTIONS	NOTIFICATIONS MANAGEMENT
Direct messages and group channels with photos and files - all inside ServiceM8. Benefit: Operational conversations stay together instead of splitting across personal messaging apps.	Keep replies attached to the correct Diary note, mention teammates and react with emoji. Benefit: Replies retain job context, making handovers and accountability much clearer.	View unread items, open related work and manage notifications in a clearer workspace. Benefit: Important updates are easier to prioritise and less likely to be missed.
SEND FROM YOUR OWN DOMAIN	KNOWLEDGE IMPROVEMENTS	TOOLBOX MEETINGS
Send quotes, invoices and supported customer emails from an email address on your own business domain. Benefit: Customers recognise the sender, supporting trust and a more professional brand experience. <i>Requires Website and Email add-on.</i>	Create, organise and share procedures, documents and service information more easily. Benefit: Procedures become easier to maintain, find and use consistently across the team.	Record toolbox meetings in Knowledge and keep the audio and transcript together. Supported devices can also generate summaries and action items. Benefit: Decisions and actions remain searchable after the meeting has finished.

MATERIALS & PRICING

New supplier and pricing tools help businesses keep costs and selling prices more consistent. ServiceM8 15 gives you better control over what you pay, what you charge and how materials are managed - from supplier quote to job invoice.

Pricing Strategy Setup: If you use supplier price lists or automatic markups, configure and test your Pricing Strategies before relying on them for live pricing. Incorrect rules can affect future sell prices, so test with a small sample first.

Feature Check: Supplier Quote Import requires the Supplier Invoice Import add-on. Pricing Strategies require Markup Billing. Supplier price lists require Automated Supplier Import. Staff access also depends on Security Role permissions.



Inconsistent pricing costs money quietly - wrong markups, outdated prices, manual re-entry errors. These tools close those gaps.

What's improved:

- Fixed or dynamic markup rules applied automatically
- Supplier quotes imported directly into jobs
- Bulk price increases with preview before applying
- Materials and Bundles editable from the app
- Bundle images added to Proposals
- Full material change history per job

The strongest use is pricing strategy setup. Set your Pricing Strategies, connect the relevant supplier price lists, and let ServiceM8 recalculate sell prices as supplier costs change.

PRICING STRATEGIES	SUPPLIER QUOTE IMPORT	BULK PRICE INCREASE
Apply fixed or dynamic markup rules so prices stay consistent as supplier costs change. Benefit: Margins stay protected consistently as costs and pricing rules change.	Bring supplier quotes into a job then add items individually or as a Bundle. Benefit: Less manual entry means quicker estimating and fewer transcription mistakes.	Increase saved prices by a percentage and preview the result before it applies. Benefit: Saved prices updated efficiently with a safety check built in. <i>Important: Bulk Price Increase has no automatic undo and does not update prices already on existing Jobs, Quotes, Work Orders or Invoices.</i>
MATERIALS IN THE APP	JOB MATERIAL HISTORY	BUNDLE IMAGE SUPPORT
Search, create and edit Materials and Bundles from the mobile app. Benefit: Prices and product details corrected from site without waiting for the office.	See who added, edited or removed materials and services over the life of the job. Benefit: A visible audit trail makes changes easier to explain and investigate.	Add an image to each Bundle so customers can compare proposal options visually. Benefit: Visual proposals are easier for customers to understand and act on.
QUOTE AND INVOICE PREVIEW	BARCODE LOOKUP	MARGIN PROTECTION
Review the finished PDF before it is sent to the customer. Benefit: Layout or content issues caught before the customer sees them.	Scan a barcode with the Job camera to find the matching Material or Asset. Benefit: Materials and assets identified faster and recorded more accurately.	Set a threshold where card payments are hidden on larger online invoices to protect margins. Benefit: Large jobs stay profitable by steering clients to lower-cost payment methods.

BETTER FIELD TOOLS

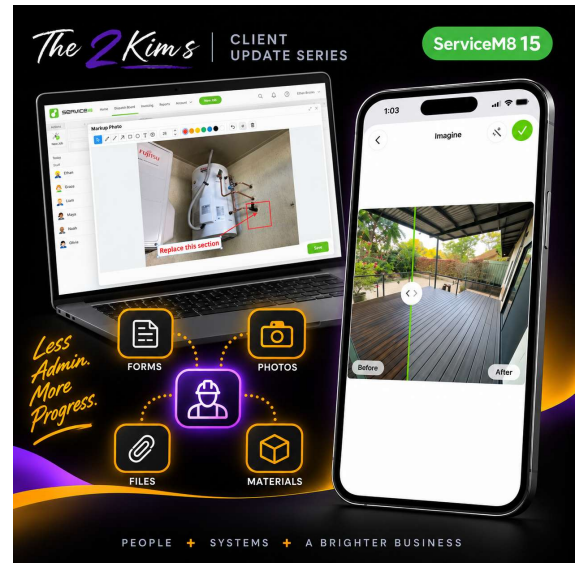
Forms, photos, files, materials and mobile workflows have all been improved. ServiceM8 15 removes friction from the small tasks field staff repeat every day - finding the right form, attaching a file, selecting a photo or recording a note on site.

Most admin errors start on site. A missing photo, a skipped question, a document left in a personal email. These changes make the correct thing the easy thing while the tech is still at the job.

What's improved:

- Files attached directly to the Job Card from the device
- Full Form Mode shows every question at once, completed in any order
- Forms searchable instead of scrolled through
- Photo picker with List, Grid or Large previews
- iOS contacts imported as clients
- Emails forwarded straight from the app

The strongest use is checkout. Tech completes the form, attaches the compliance photo, forwards the supplier email and checks out - all before leaving the driveway. Nothing waits until they get back to the office.



ATTACH FILES	FULL FORM MODE	SEARCH FORMS
Add files from your device directly to the Job Card.	View every question together and complete the Form in any order.	Search for the correct Form instead of scrolling through the full list.
Benefit: Site documents added immediately, keeping the job record complete.	Benefit: Staff work through inspections in the order that suits the site visit.	Benefit: Less time scrolling, more time completing the correct paperwork.
DUPLICATE FORM TEMPLATE	FORM PHOTO PICKER	IMPORT IOS CONTACT
Copy an existing Form and use it as the starting point for a new one.	Choose List, Grid or Large previews to find the correct image faster.	Create a new ServiceM8 client using contact details already saved on your iPhone or iPad.
Benefit: New forms created faster while retaining a proven structure.	Benefit: The right evidence selected faster, especially on photo-heavy jobs.	Benefit: Existing contact details are reused quickly with fewer typing errors.
FORWARD EMAIL IN THE APP	CC VISIBILITY	EXPANDING JOB NOTES
Forward an existing email from the Job Diary directly in the ServiceM8 app, including available attachments.	See who was copied into a customer's email reply inside the app.	The note field grows as staff type, making longer updates easier to write.
Benefit: Useful correspondence can be shared from site without returning to the office.	Benefit: Staff see who received the conversation and who may respond.	Benefit: Technicians record fuller notes without fighting a cramped text box.

Android users gain significantly more ServiceM8 functionality for day-to-day field operations. ServiceM8 15 now supports significantly more Android workflows, including jobs, scheduling, communication and payments.



Mixed-device teams now have a much more consistent ServiceM8 experience. Android supports Office Agent, expanded form workflows, barcode scanning, file attachments, account switching and Tap to Pay on supported devices.

What's improved:

- Expanded Android app covering most day-to-day field workflows
- Office Agent available on Android
- Tap to Pay on Android
- Materials and bundles editable from Android
- Files attach directly to Job Cards
- Barcode scanning for Materials and Assets
- Account switching

The strongest use is mixed-device dispatch. When a job needs to be allocated, dispatch sees all available tech regardless of device. Android staff can now handle far more of the same day-to-day work as iPhone users, reducing device-based workflow differences across mixed teams.

SERVICEM8 FOR ANDROID	TAP TO PAY ON ANDROID	ANDROID + OFFICE AGENT
Expanded app access to jobs, scheduling, communication and payment workflows.	Set up Tap to Pay on a supported Android phone to accept contactless card payments without a separate terminal.	Office Agent arrives on Android alongside the other new app experiences.
Benefit: Mixed-device teams work in one system without leaving Android users behind.	Benefit: Payment capture no longer depends on carrying an iPhone.	Benefit: Field staff on Android aren't left behind on the headline feature of this release.

BARCODE LOOKUP	ATTACH FILES	ACCOUNT SWITCH
Scan a barcode with the Job camera to find the matching Material or Asset on Android.	Add files from your Android device directly to the Job Card on site.	Add and move between ServiceM8 accounts from the profile screen on Android.
Benefit: Materials and assets identified faster and recorded more accurately without manual searching.	Benefit: Site documents captured immediately - job record stays complete without returning to the office.	Benefit: Staff working across multiple businesses switch accounts without logging out and back in.

VISUAL TOOLS

Imagine and Photo Markup help teams create clearer visual information for customers and jobs. ServiceM8 15 gives field staff better ways to show customers what's proposed, what's been found and what the finished result could look like - directly from the job.

Device Requirements: Imagine is available in the ServiceM8 mobile apps and Online Dashboard. Photo Markup is available in the iOS app and Online Dashboard. Room Scan requires a compatible LiDAR-equipped iPhone or iPad. Apple Watch features require a paired iPhone.

A photo without context leaves customers guessing. These tools turn job photos into communication - annotated evidence, AI-generated visuals and accurate room scans that make proposals and defect reports easier to understand.

What's improved:

- AI-generated visuals created from job photos
- Photo markup with shapes, text and drawings
- Room scan wall colours captured accurately
- Photo picker with List, Grid or Large previews
- Annotated photos shareable with customers
- Visual concepts generated on-site from the app

The strongest use is selling upgrade work. Take a photo of the existing installation, run Imagine, show the customer a visual of the finished result before quoting. Helping customers visualise the proposed result can make the scope easier to understand before quoting or approval.



IMAGINE IN THE APP	PHOTO MARKUP	ROOM SCAN WALL COLOURS
AI-generated visualisations created from job photos	Add shapes, text and drawings to job photos to explain scope, defects or measurements.	Capture real wall colours in the 3D room scan so the saved space is easier to recognise.
Benefit: A visual concept makes an upgrade or finished result easier for customers to picture and approve.	Benefit: Annotated evidence clarifies scope, defects and instructions for customers and staff.	Benefit: More recognisable scans make saved spaces easier to revisit and discuss with customers.
FORM PHOTO PICKER	NEW APPLE WATCH APP	CUSTOM STAFF AVATARS
Choose List, Grid or Large previews to find the correct image faster while completing Forms.	Clock on, check out, view job details and record voice notes from the watch.	Create a personalised staff avatar using a selfie.
Benefit: The right evidence selected faster, especially on photo-heavy jobs.	Benefit: Common field actions stay accessible when reaching for a phone is inconvenient.	Benefit: People easier to identify across schedules, messages and shared job activity.
NEW LIST VIEWS	ACTIVITY FEED REPORTS	ONLINE DASHBOARD DATE RANGES
Custom columns, multi-selection and flexible sorting across all Online lists.	Improved weekly job reports and business statistics in the app Activity Feed.	Review Business Dashboard performance across more flexible time periods.
Benefit: Teams shape each list around the information needed for the task at hand.	Benefit: Owners monitor weekly movement from the app without running a separate report.	Benefit: Longer and more flexible comparisons make trends easier to spot.

PAYMENTS

ServiceM8 Pay changes affect processing rates and, importantly for Australian businesses, card surcharges from 1 October 2026. This is the one update that requires action before a deadline. Australian businesses need to review their pricing and payment settings before **1 October 2026**.



ACTION REQUIRED - AUSTRALIAN BUSINESSES (Deadline: 1 October 2026)

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 and will be paid by your business.

Before 1 October, decide how your business will manage the card-processing cost:

- Absorb the processing fee - no pricing change, but the business carries the cost.
- Adjust your pricing - use the available price-review or bulk-increase tools where appropriate.
- Set an online invoice card-payment limit - encourage larger invoice payments via PayTo or another lower-cost method.

LOWER SERVICEM8 PAY RATES	CARD PAYMENT LIMITS	PAYOUT SPEED
Updated card processing fees effective with this release. Benefit: Reduced per-transaction costs partially offset the loss of surcharging for your business.	Hide the card option on online invoices above a chosen amount. Benefit: Encourage larger invoice payments through lower-cost options such as PayTo or bank transfer.	Payouts are generally initiated to your nominated bank account the next business day. Benefit: Faster cash flow — invoice on site, with payouts generally initiated the next business day.
TAP TO PAY	PAYTO - AUSTRALIA	QUOTE AND INVOICE PREVIEW
Accept contactless payments on iPhone or Android - no terminal needed. Benefit: Get paid on site the moment the job is done - no chasing invoices later.	Customers can pay invoices online via PayTo as an alternative to card payment. Benefit: Gives customers a card-free payment option, useful for larger invoices post-October.	Review the finished PDF before sending it to the customer. Benefit: Catch layout or content issues before the customer sees them.

ServiceM8 Pay users: Eligible Australian accounts can use the Card Payment Surcharge Preparation Wizard in the Online Dashboard to review PayTo, online invoice card limits and optional price increases.

ServiceM8 Pay from 1.19%				
Premium Plus	Premium	Growing	Starter	Lite / Free
1.19%	1.39%	1.49%	1.69%	1.89%
Was 1.49%	Was 1.49%	Was 1.65%	Was 1.85%	Was 2.10%
+30c per transaction.				
Australian rates				

Smarter
Systems
Brighter
Business

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Setup • Train • Streamline • Grow

PEOPLE
SYSTEMS
BETTER
BUSINESSES

Our Dedicated Update Page

Everything your business needs to understand
the update – all in one place.

Click through to our website and explore:



Readiness Checklist

Be prepared
with confidence.



Customer FAQ

Straight answers
to common questions.



What Has Changed & What You Need To Do

A clear breakdown
in plain English.



Live Update Sessions

Get your questions
answered live.



Demonstration Videos

See the changes
in action.



Comparison Guide

Side-by-side insights
to help you plan.

Don't just activate the update - make it work for your business

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