



# Customer Notifications

Setup 101

# Customer Notifications

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# CN – Setup 101

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- Security Access
- Company/Branch Settings
- Flag Codes
- Customer Notifications Settings
- Customer Notifications Analytics

# CN - Security Access



## Employee Setup

Create and manage employees



## Security Level Setup

Manage security levels

Security Access to Customer Notifications can be granted on a group or individual level using security groups or custom security.

Mobile, CAW 2.0 and Customer Notifications	View	Add	Edit	Delete	Print	All
Mobile Admin Site	<input checked="" type="checkbox"/>					All
Mobile Customer Search	<input checked="" type="checkbox"/>					All
CAW Service Groupings	<input checked="" type="checkbox"/>	All				
Customer Notification Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		All

# CN – Company/Branch Settings



Flag codes are a good idea when it comes to testing. You can limit who should and shouldn't receive a notifications with flag codes. When getting started create a "CN Test" or similar flag code to add to test customers.

**Flag Code Setup**

Description *	French Description	Spanish Description
CN Test	French Description	Spanish Description
Available <input checked="" type="checkbox"/>	Expires <input type="text"/>	Text Color <input type="text"/>
Print On Invoice <input type="checkbox"/>	Print On Estimate <input type="checkbox"/>	Emphasis <input type="checkbox"/>
		Background Color <input type="text"/>
		Sort <input type="text" value="9"/>
		Internet <input type="checkbox"/>
		Notes <input type="text"/>

# CN - Company/Branch Settings

## Customer Notifications

Tax Id/EIN:

CN SMS Number:  Approved [Details](#)

Notifications Send From:

Reply Email Address:

Recommended SPF Setup:

Each branch can have independent Settings in Customer Notifications. Each branch can have its own from name, logo, email address, SMS number, social media links, branding colors, and black out times.

## Customer Notification Settings

Social Media Links: When enabled, a link will appear in your customer notification email footer

X (Twitter)

Facebook

Instagram

Blackout Period. When enabled, notifications will not be sent outside of these times. Enter times in Eastern Time. Most states require SMS messaging be restricted to the "waking hours" of 9 AM - 8 PM in the recipient's local time.

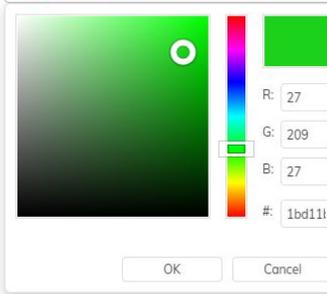
Enable

Do Not Send Before:

Do Not Send After:

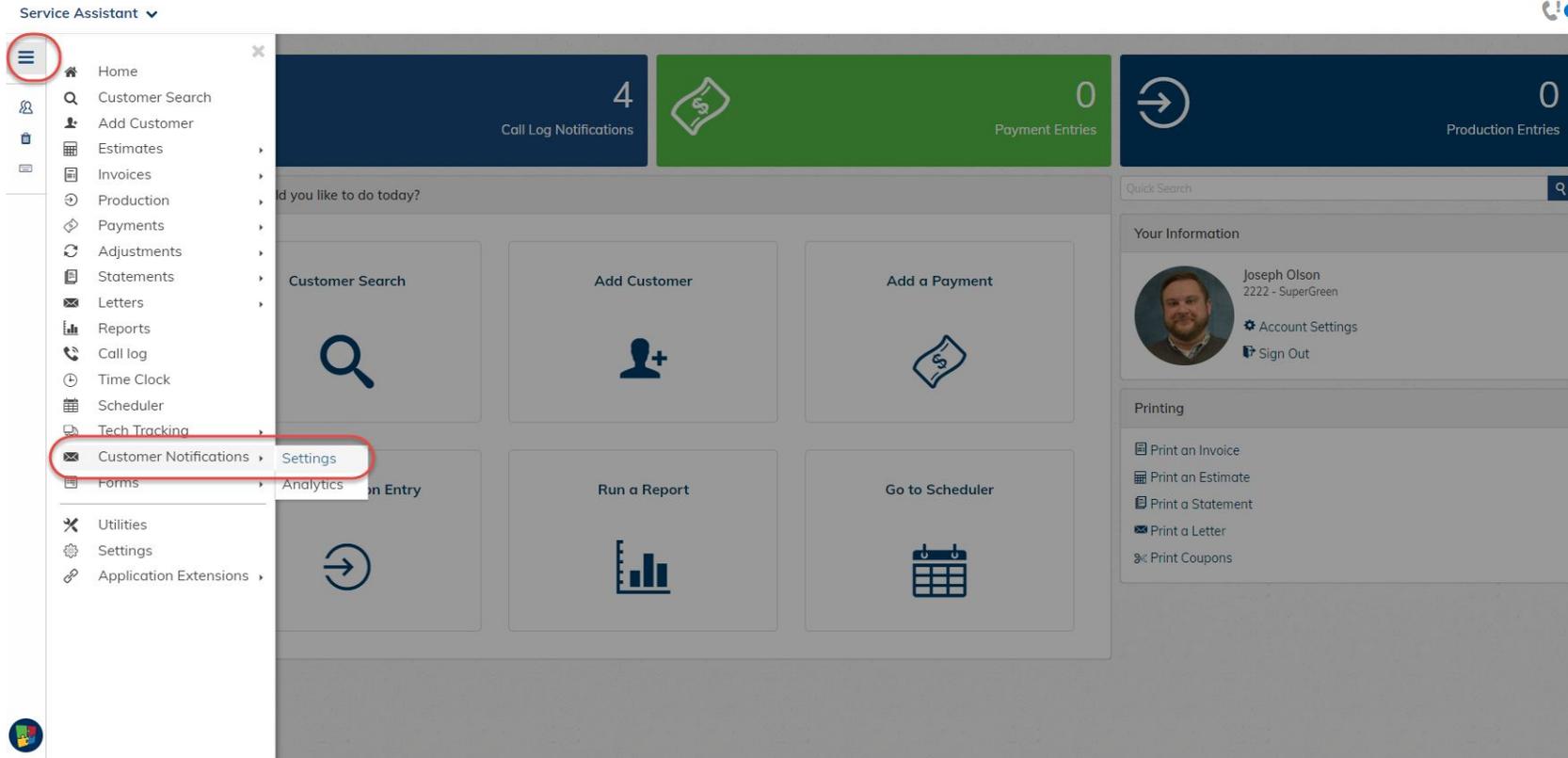
Primary Color Theme

Secondary Color Theme



Color picker dialog showing a green color with RGB values (R: 27, G: 209, B: 27) and hex code #1bd11e. The dialog includes a color spectrum, a color selection area, and OK/Cancel buttons.

# CN - Settings



Access Customer Notifications from the Menu in the upper left corner.

Find Customer Notifications - Settings

# CN - Customer Notification Settings

First Launch of Customer Notifications will bring us to the welcome page. From here we can build a new notifications.

If you have already built a notifications you will land on the settings page.

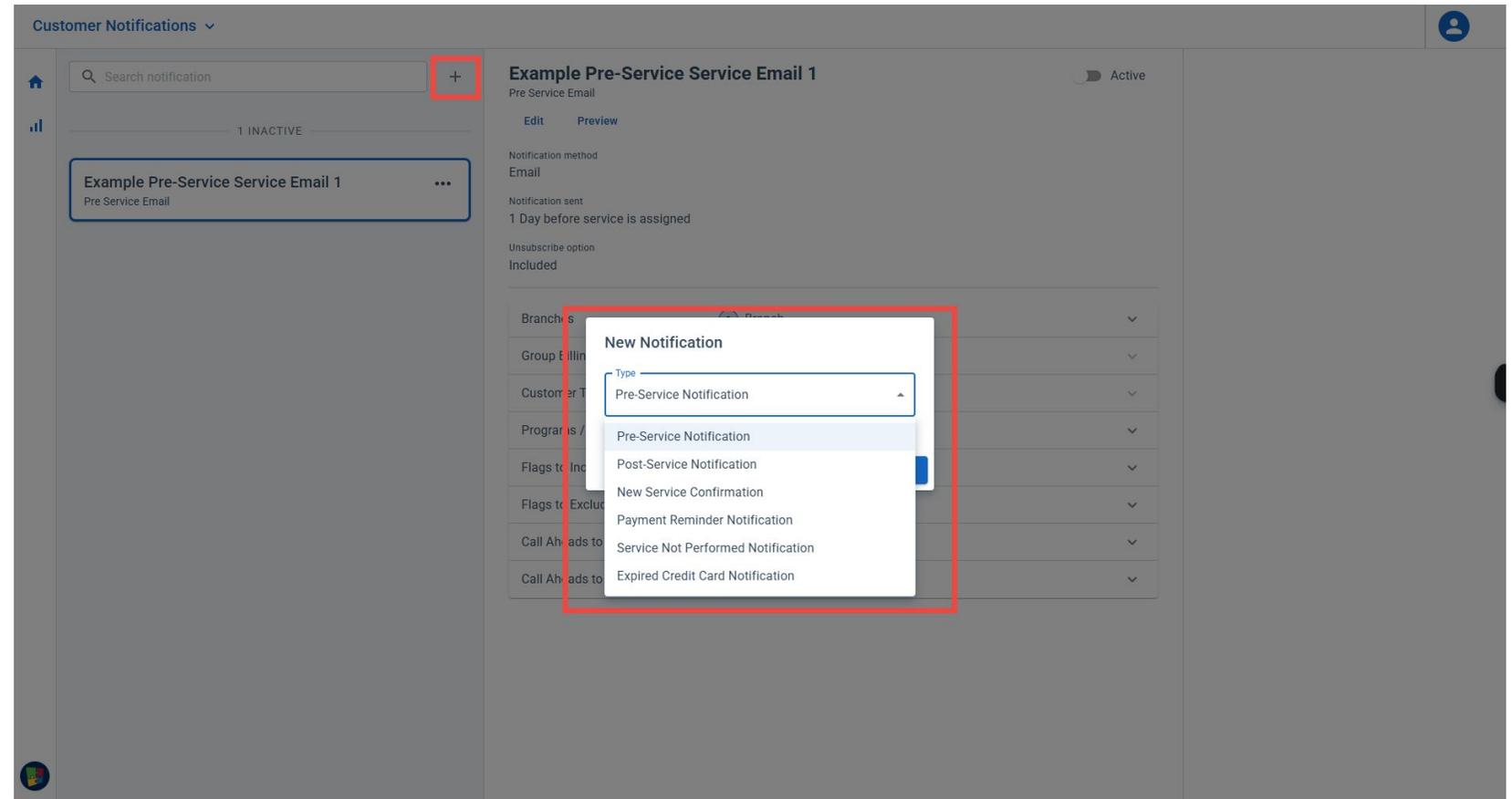
The screenshot displays the 'Customer Notifications' interface. At the top, there is a navigation bar with 'Customer Notifications' and a user profile icon. The main content area features a 'Welcome to Customer Notifications' message with a 'Build New Notification' button. To the right, an illustration shows a person mowing a lawn with icons for a lawnmower, a leaf, and a gear. Below the welcome message, a list of existing notifications is shown, including 'Joe's Test Service Confirmation SMS', 'Joe's Test Service Confirmation Email', 'Joe's Test Post-Service SMS', 'Joe's Test Pre-Service SMS', 'Joe's Test After Service Email', 'Joe's Test 1 Day Before Service Email', and 'Post Service Notification - Test - RJM'. The 'Joe's Test Service Confirmation SMS' notification is selected, and its settings are displayed on the right. The settings include a search bar, a list of 7 active notifications, and a list of 28 inactive notifications. The settings for the selected notification include a search bar, a list of 7 active notifications, and a list of 28 inactive notifications. The settings for the selected notification include a search bar, a list of 7 active notifications, and a list of 28 inactive notifications.

# CN – Building A Notification

Click the + near the top of the page to create a new notification

Select from the 6 available type

You can create multiple of the same type of notifications with different settings



# CN – Building A Notification

Once you have selected a type. You can configure your notification. Be sure to set sending preferences, filters, configure the message body and save. You can preview the message once saved.

The screenshot shows the 'Customer Notifications' management interface. On the left, a sidebar displays a search bar and a list of notifications, including 'Example Pre-Service Service Email 1'. The main area is titled 'Creating New Notification Configuration' and is for a 'Post-Service Notification'. The configuration includes:

- Name your notification:** Example Post-Service Email 1
- Notification type:** Email (selected), SMS
- Sending Preferences:** Send Immediately (selected), After service is posted
- Recipient Filters:** Manage Filters button, No filters added. Select Manage Filters to add required filters.
- Filter List:**
  - Branches: 0 Branch
  - Group Billing: Include Customers on Group Billing
  - Customer Type: Residential/Commercial
  - Programs / Services: 0 Program / Special Job
  - Flags to Include: 0 Flag
  - Flags to Exclude: 0 Flag
  - Call Aheads to Include: 0 Call Ahead

Buttons for 'Cancel' and 'Save' are located at the bottom right of the configuration panel.

# CN – Notification Triggers

## 1. Pre Service Notification:

- a. **Trigger: Service Assign Date**
- b. **Service's Assign Date** is within Sending Preference (to make assign date and tech required in SA5 go to Settings > Documents/Letter Setup > General Setup – Documents/Letters and check the box for Assign to Technician.)
- c. Service is in \$ status
- d. Customer Matches all Filters on message (Serviced by a Branch included in filters, the service that is printed and assigned is included in filters, customer type of residential or commercial is one included in filters, customer matches flags set to include or exclude).
- e. Note: When 'Confirm Appointment' link is included and clicked the 'Confirmed' check box on the service in SA5 will be checked with and the date and time the link was clicked will be displayed.

## 2. Post Service Notification

- a. **Trigger: Service Posted Date**
- b. **Service's Posted Date** is within the sending preference
- c. Customer Matches all Filters on message (Serviced by a Branch included in filters, the service that is posted is included in filters, customer type of residential or commercial is one included in filters, customer matches flags set to include or exclude).
- d. Note: Multi service invoices (associated services) will be displayed in a single email.

## 3. Payment Reminder

- a. **Trigger: Service Posted Date**
- b. A service or installment charge remains unpaid for an amount of days set in Sending Preferences after the **Posted Date**
- c. Customer Matches all Filters on message (Serviced by a Branch included in filters, the service unpaid is included in filters, customer type of residential or commercial is one included in filters, customer matches flags set to include or exclude, customer has a remit balance that is at least the amount set for minimum balance).
- d. Note: Installment Charges and Services with Statement billing type can be included or excluded from qualifying a customer to receive a payment reminder.

## 4. New Service Notification

- a. **Trigger: Program/Service Sold Date**
- b. Sold Date on the service is within Sending Preference selected
- c. Service is in active status (8 or 9 status)
- d. Customer Matches all Filters on message (To be serviced by a Branch included in filters, the service that sold is included in filters, customer type of residential or commercial is one included in filters, customer matches flags set to include or exclude).
- e. Note: Services entered on the same date will be included in the one email. If using the Same Day sending preference services that are entered within 20 minutes of each other will be included in the same email. Services entered more than 20 minute apart will have separate emails.

## 5. Service Not Performed Notification

- a. **Triggers: Scheduled service is marked as not serviceable with a Service Not Performed Reason**
- b. Service must have one of the selected No Service Reasons saved in Recipient Filters
- c. Service marked not serviceable in the date range selected in Sending Preferences

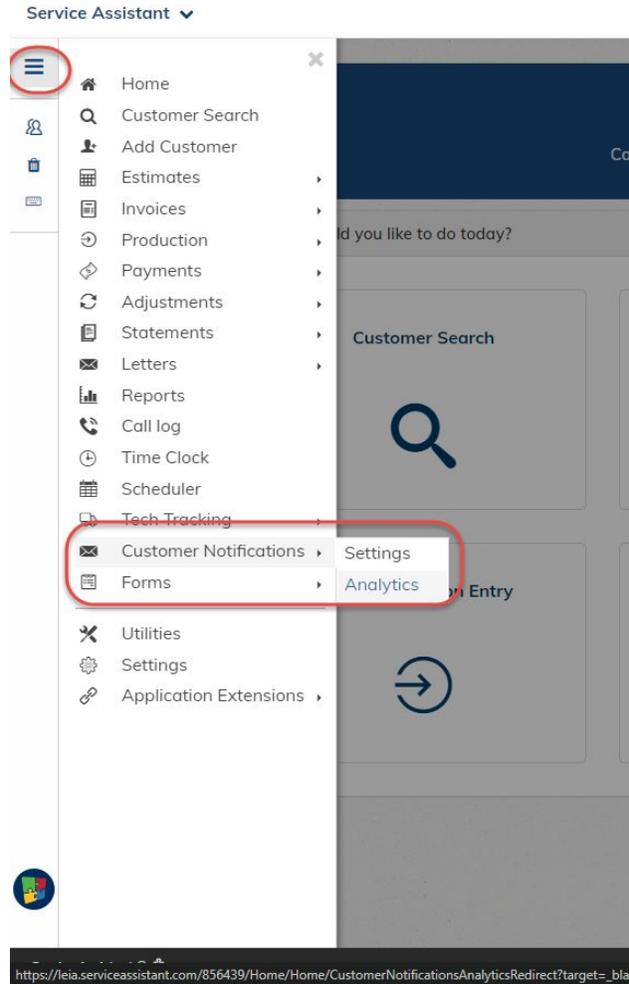
## 6. Expired Credit Card Notification

- a. **Triggers: Expiration date of stored credit card payment method**
- b. Expiration date must be within the date range saved in sending preferences

# CN - Analytics

Analytic Reports can be accessed from the menu in the upper left of SA5 in the Customer Notifications submenu

Or if you are in Customer Notification Settings you can click the graph icon on the left to get to analytics.



# CN - Analytics

The screenshot displays the 'Customer Notifications' analytics page. At the top, there's a search bar and a date range selector set to '30 Days'. Below this is a table of notifications with columns for Name, Status, Type, Channel, Sent, Failed, and Credits. The table lists several test notifications, including 'Before Service Email', 'After Service Email', and 'Before Service Sms'. A detailed view of a notification is shown below, providing a more granular look at the data.

Notification Name	Notification Status	Type	Channel	Sent	Failed	Credits
<a href="#">Joe's Test 1 Day Before Service Email</a>	Active	Before Service Email	Email	1	0	1
<a href="#">Joe's Test After Service Email</a>	Active	After Service Email	Email	1	0	1
<a href="#">Joe's Test Pre-Service SMS</a>	Active	Before Service Sms	SMS	2	0	2
<a href="#">Test Post-Service SMS</a>	Archived	After Service Sms	SMS	1	0	1
<a href="#">Joe's Test Post-Service SMS</a>	Active	After Service Sms	SMS	1	0	1
<a href="#">Joe's Test Service Confirmation Email</a>	Active	Service Confirmation Email	Email	1	0	1
<a href="#">Joe's Test Service Confirmation SMS</a>	Active	Service Confirmation Sms	SMS	1	0	1

The first page of analytics gives a listing of any notifications send in the date range selected. You will see how many were sent, how many failed, what channel they went out on and the total credits used.

If you click on one name of a notification we get a detail view of specific accounts that received the notification

# Customer Notifications

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## Live Demo

# Session Feedback

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- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

# Questions?

# Title Goes Here

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	Title	Title	Title
1	XX	XX	XX
2	XX	XX	XX
3	XX	XX	XX
4	XX	XX	XX