RealGreen® by WORKWAVE®

Customer Notifications

Setup 101

BEYOND SERVICE CUSTOMER CONFERENCE '26

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Customer Notifications

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Product Owner, RealGreen by WorkWave

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CN – Setup 101

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

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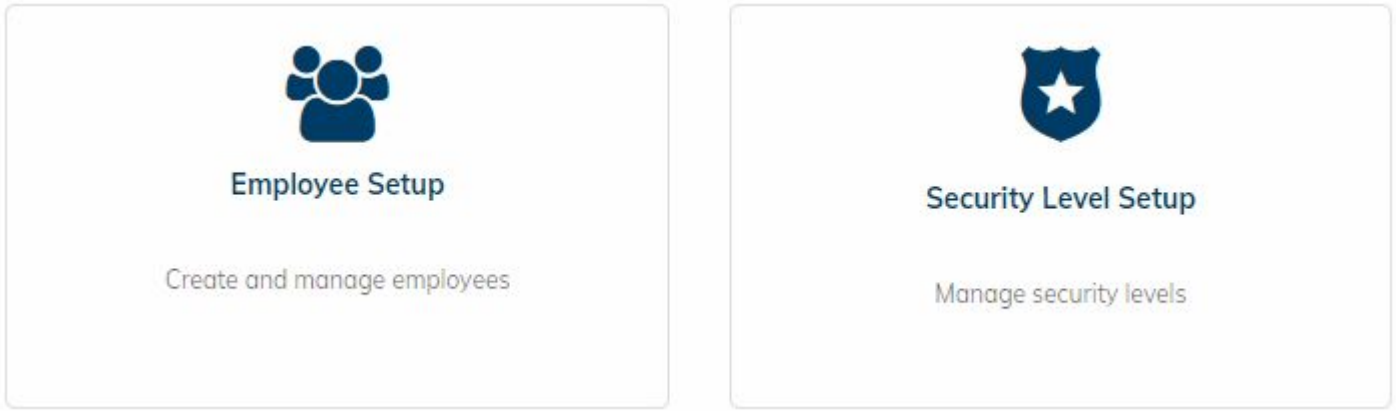
CN - Security Access



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	✓					All
Mobile Customer Search	✓					All
CAW Service Groupings	✓	✓	✓	✓	✓	All
Customer Notification Settings	✓	✓	✓	✓		All

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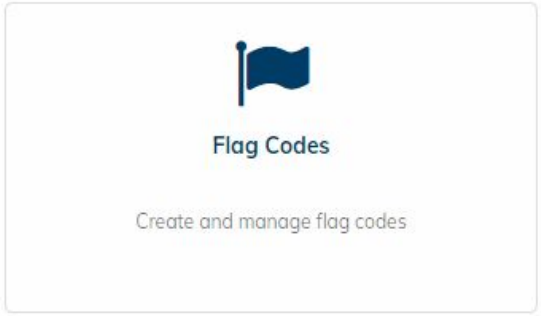
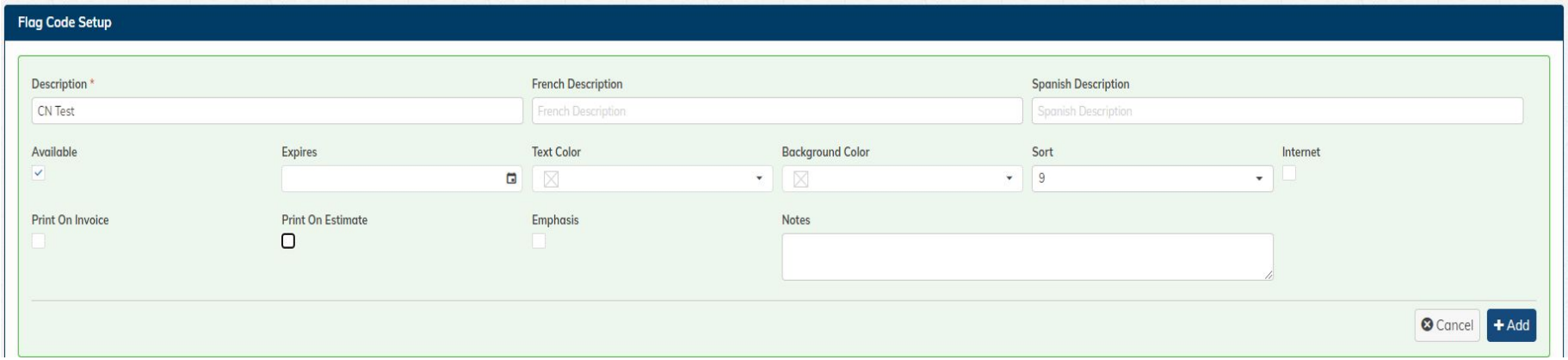
CN - Company/Branch Settings





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.

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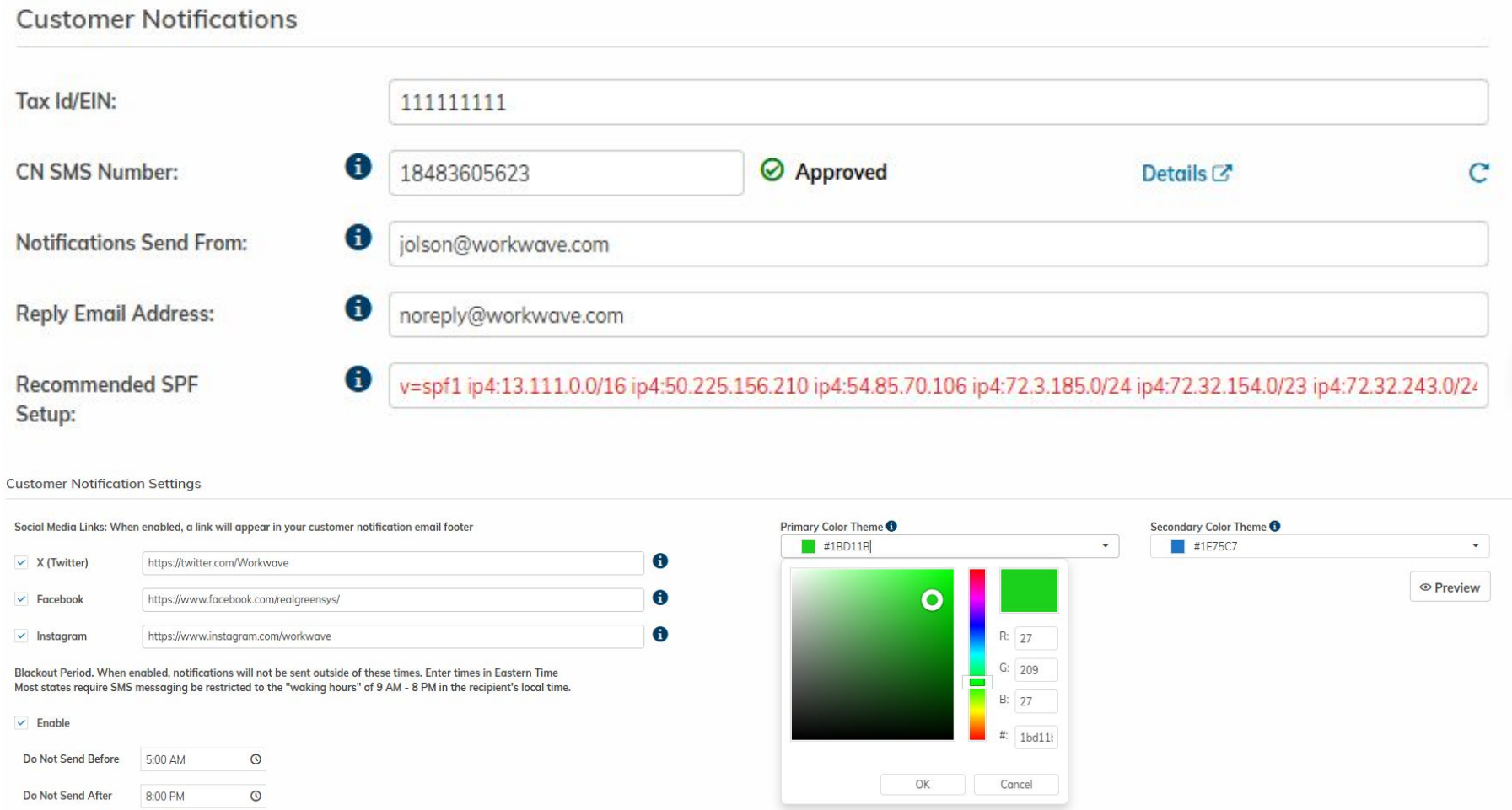
CN - Company/Branch Settings



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.

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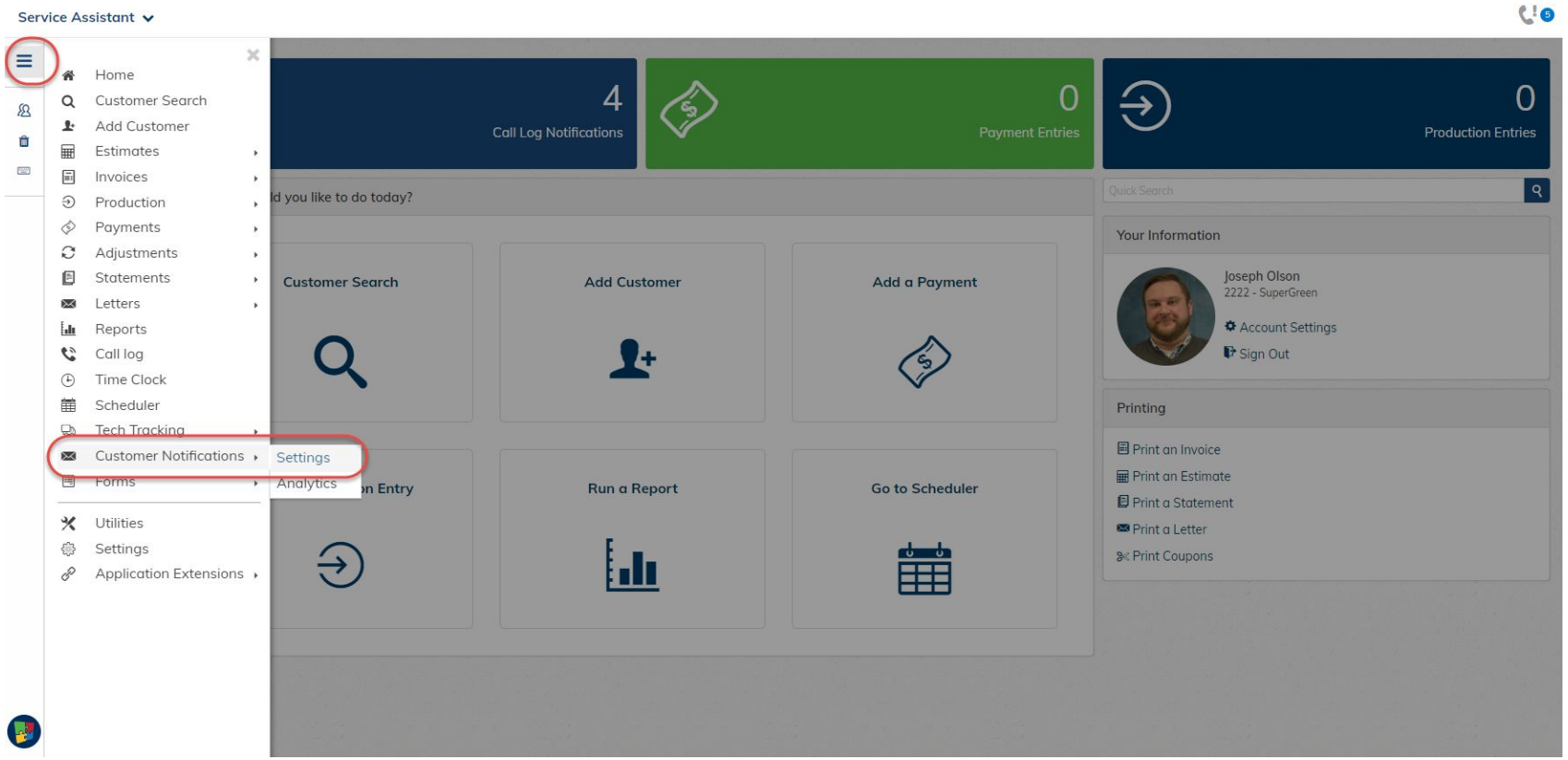
CN - Settings



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

Find Customer Notifications - Settings

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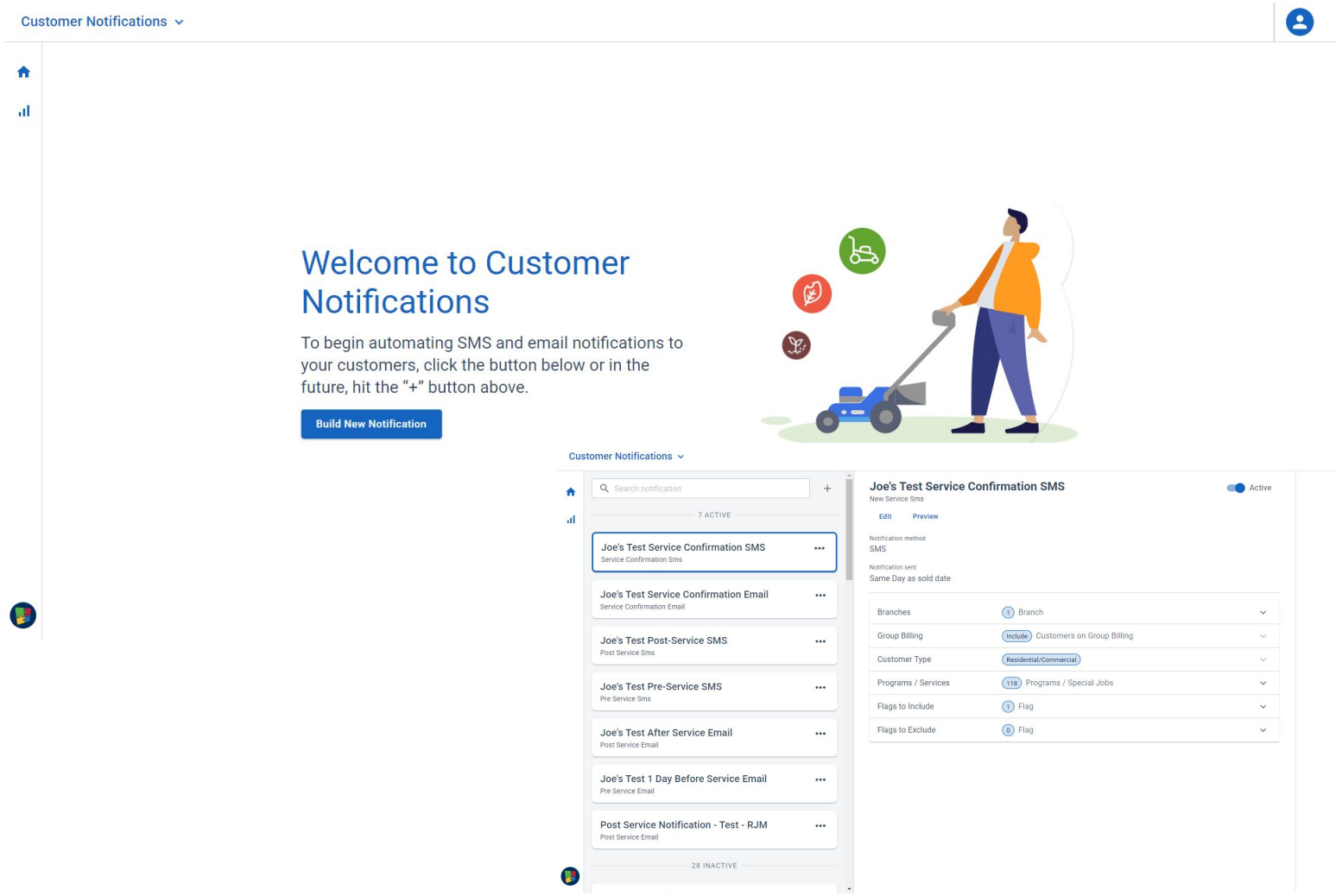
CN - Customer Notification Settings

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.



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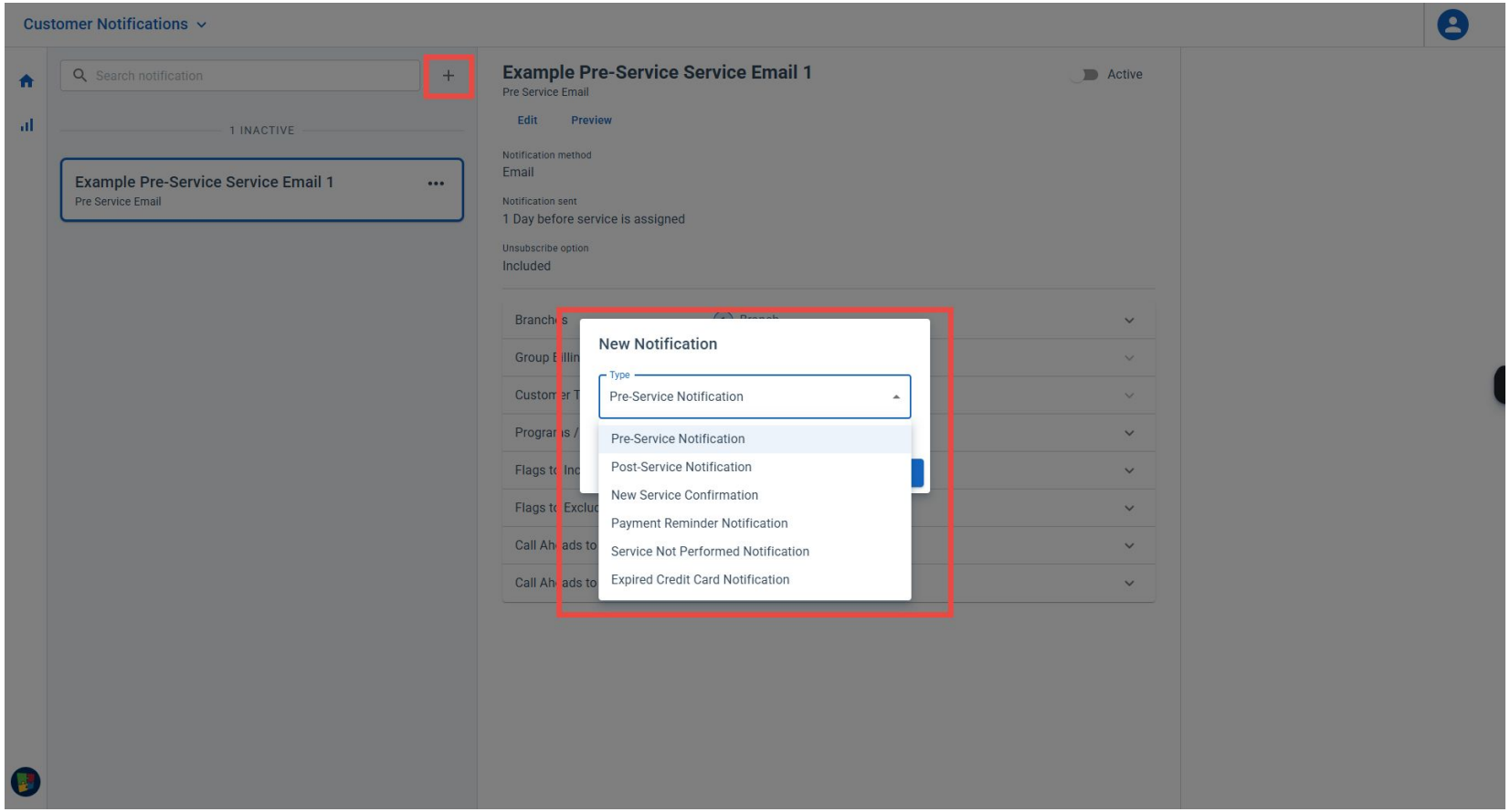
CN - Building A Notification

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



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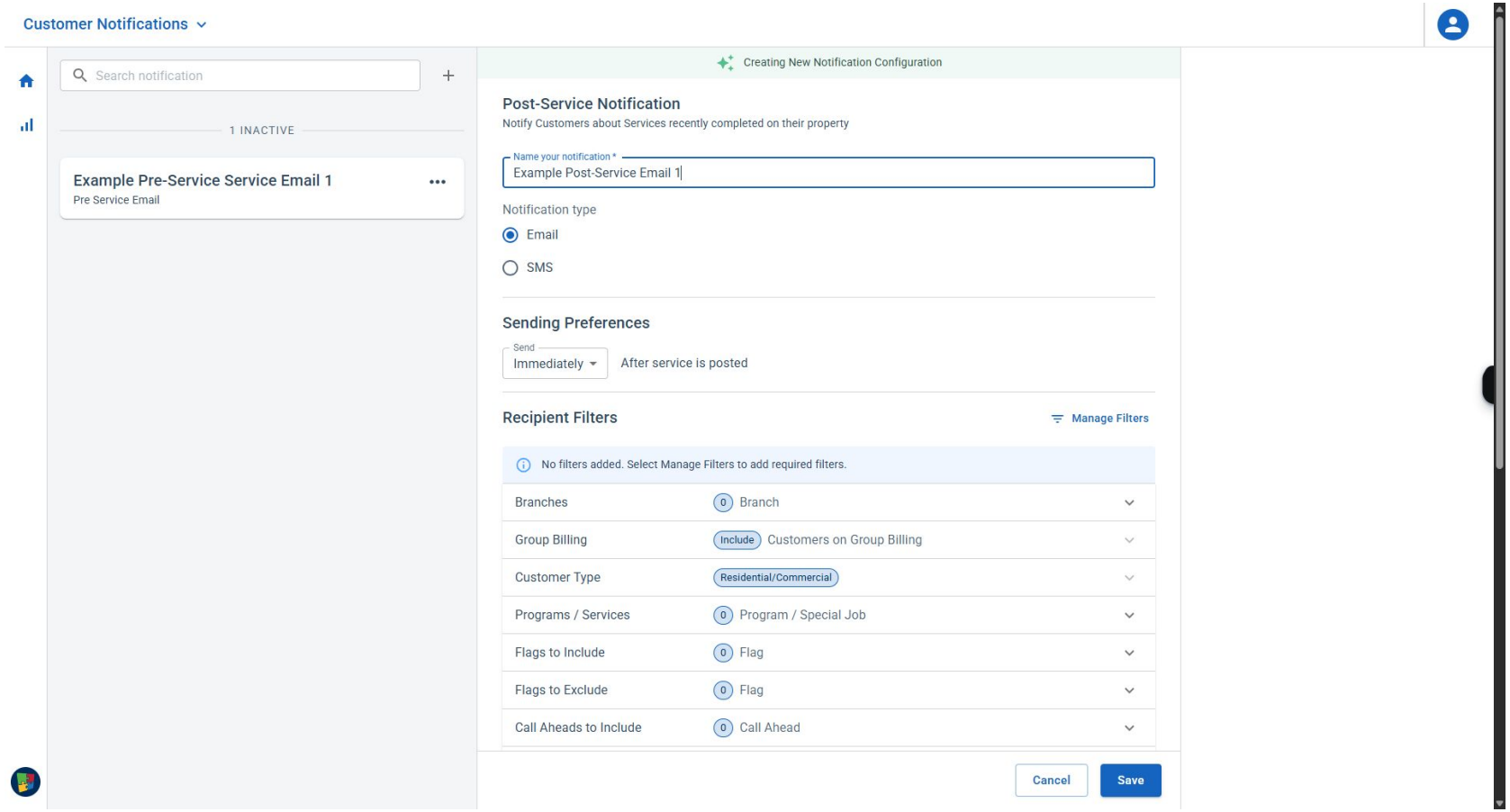
CN - Building A Notification

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.



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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

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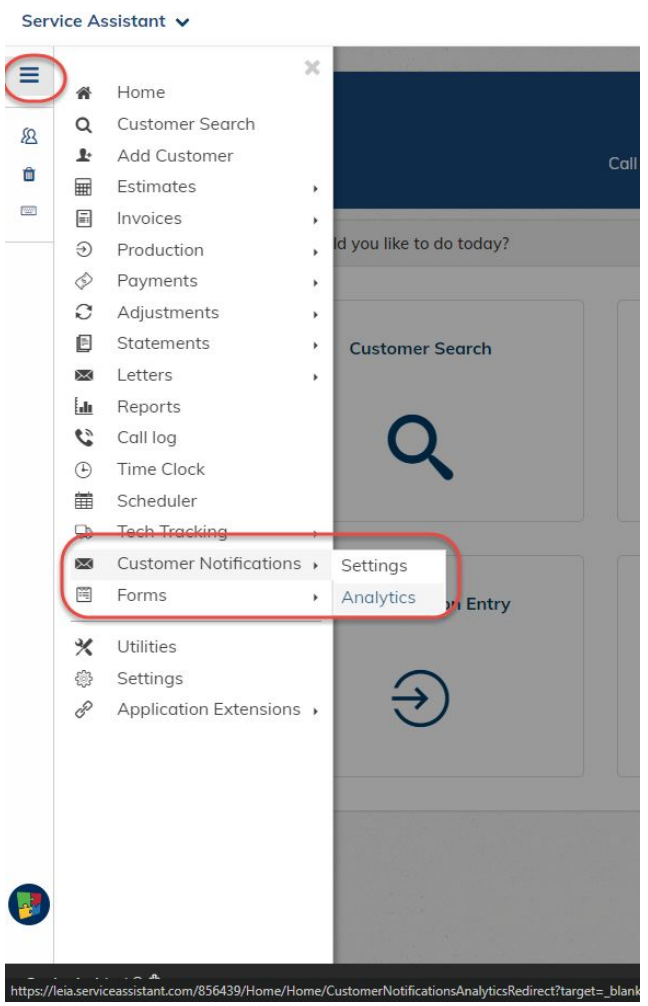
CN - Analytics

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.



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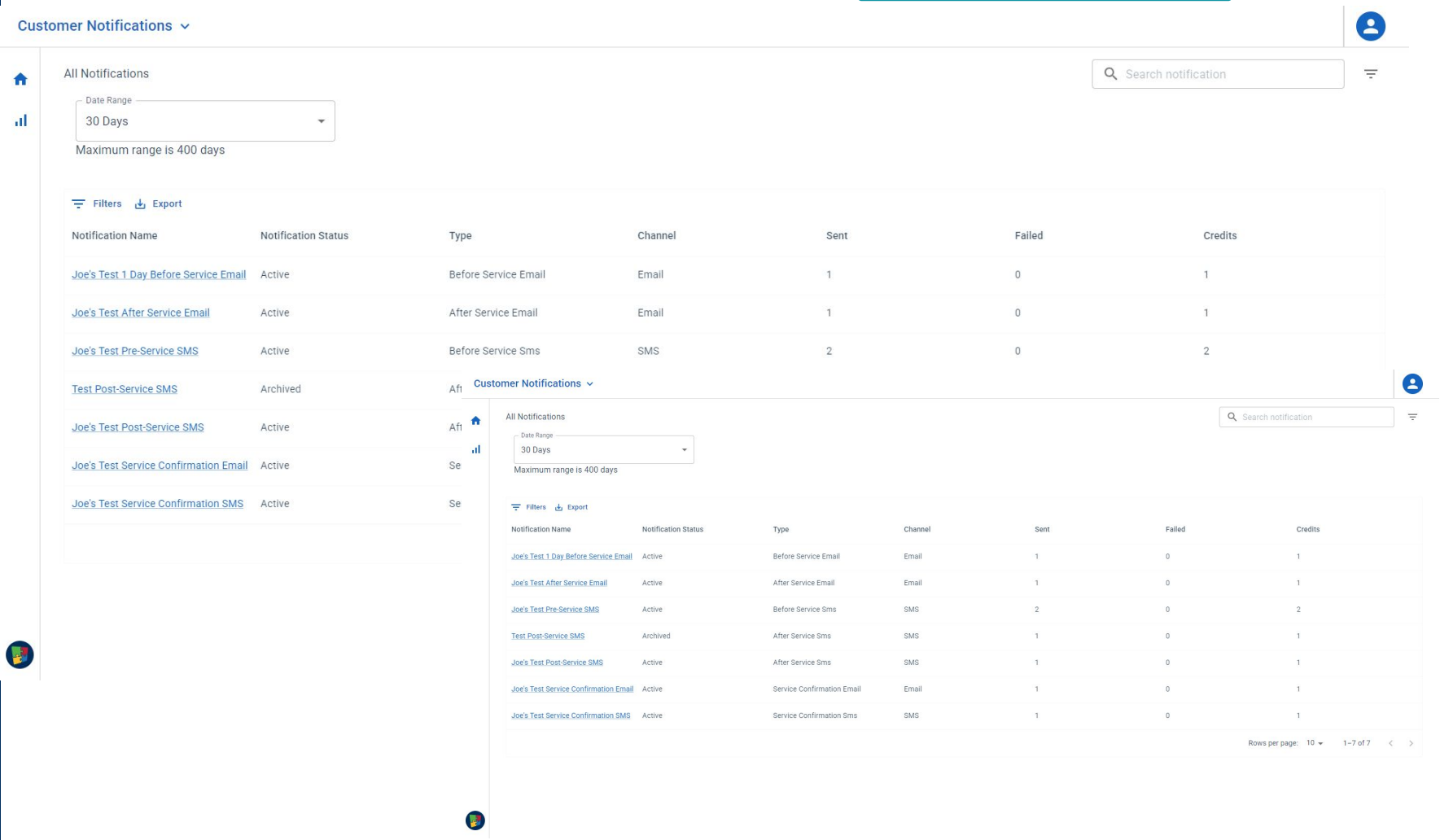
CN - Analytics



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

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Customer Notifications

Live Demo

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Session Feedback

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

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Questions?

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Title Goes Here

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

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