



Customer Notifications

What can RealGreen's
Award-Winning Release do for you?

Customer Notifications



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Customer Notifications

What Is Customer Notifications?

- Customer Notifications, our automated email and SMS notifications tool, is designed to keep your customer informed about their service-based transactions in real-time. Customer Notifications is part of the next generation of AMA. This powerful tool integrates seamlessly with your existing Service Assistant system to automatically send personalized notifications to your customers, ensuring they are always up-to-date on their service and account status.

Customer Notifications

What We've Done...

- **Marketing Communication**



AMA 1.0

- **Service Based Communication**



Customer Notifications - SA5

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- **Customer Notifications: Service Based Communication**
 - **Marketing Messages : Stay Part Of AMA 1.0**

Customer Notifications

Notifications Available

- New Service Confirmation
- Pre-Service Notification
- Post-Service Notification
- Payment Reminder
- Service Not Performed Notification
- Expired Credit Card Notification

Channels

- Email
- SMS (Supports 10 DLC Regulations in US and Canada, KYC regulations in UK)

Features

- Self Service
- Support from multiple brands/branches
- Analytics Page (Email/SMS Sent or Failed)

Countries Supported

- USA
- Canada
- UK

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.

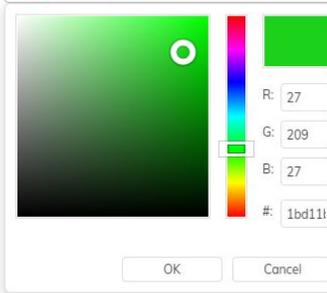
Enable

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 - Company/Branch Settings

Tax Id/EIN: 111111111

CN SMS Number: 18483605623 Approved [Details](#)

AMA SMS Number:

10 Digit Long Code (10 DLC) Registration built into SA5 to facilitate SMS messaging to customers. The system will track your progress from submission to approval.

The screenshot shows the 'Enroll Phone Number' dialog box. The dialog contains the following text: 'To enable sending text notifications from your branch, you must either first provision a new phone number below OR copy a phone number from a registered branch.' There are two radio buttons: 'New phone number' (selected) and 'Copy phone number'. Under 'New phone number', there is a note: 'If you are enrolling a branch with a Tax ID (EIN) that hasn't been used with SMS notifications before, you will be redirected to a new page so we can gather more details.' Below this, there is a field for area code with '848' entered, a 'Generate Numbers' button, and a dropdown menu for phone number with '+18483087054' selected. At the bottom of the dialog are 'Okay' and 'Cancel' buttons. In the background interface, a 'Register' button is circled in red, with a red arrow pointing to it from the dialog.

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

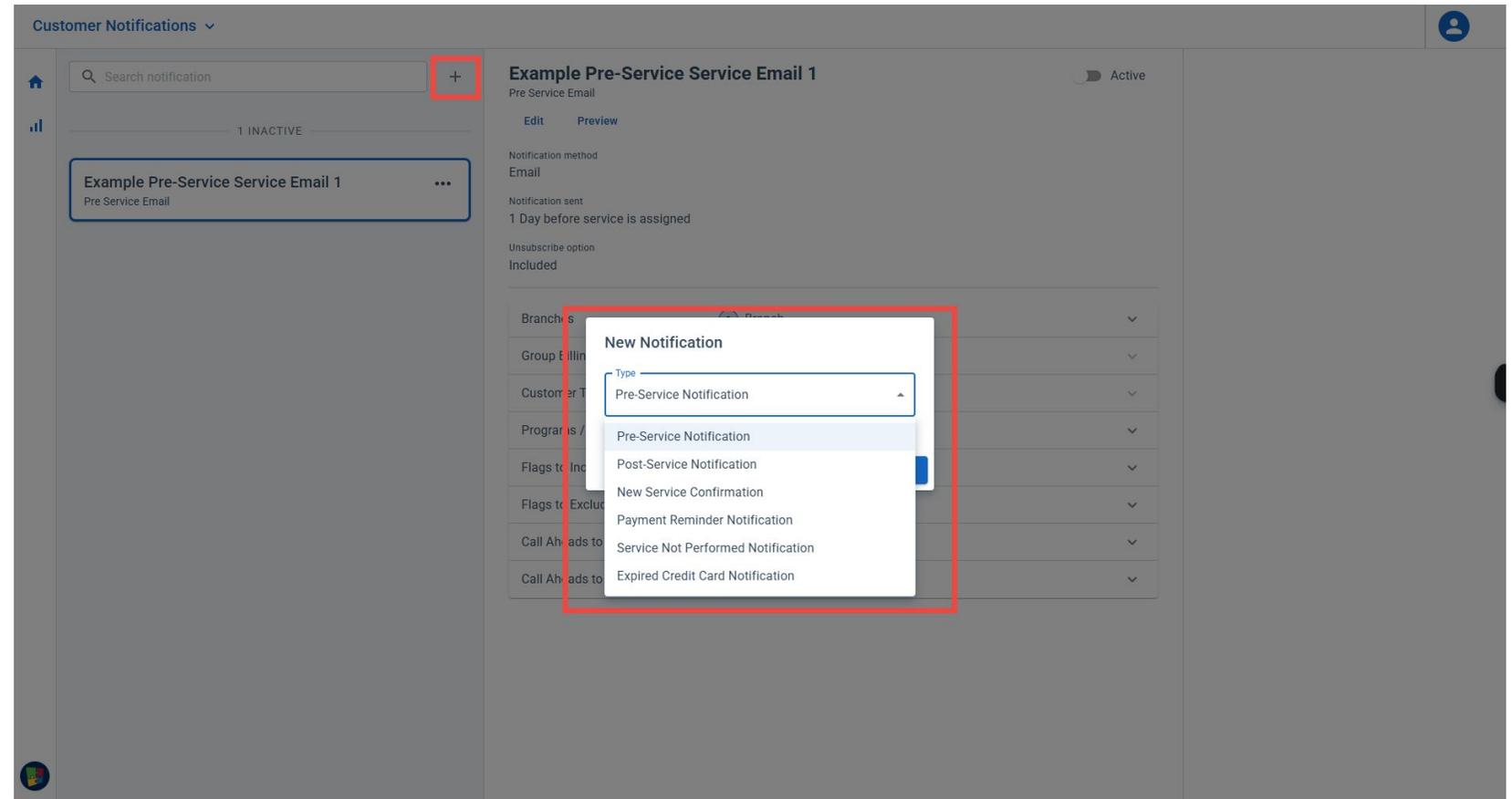
- a. **Triggers: Expiration date of stored credit card payment method**
- b. Expiration date must be within the date range saved in sending preferences

CN – 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



Customer Notifications

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' configuration page. On the left, there is a sidebar with 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 a name field ('Example Post-Service Email 1'), a notification type selection (Email is selected), and sending preferences (Immediately after service is posted). Below these are recipient filters for Branches, Group Billing, Customer Type, Programs / Services, Flags to Include, Flags to Exclude, and Call Aheads to Include. A 'Save' button is at the bottom right.

Customer Notifications

Search notification

1 INACTIVE

Example Pre-Service Service Email 1
Pre Service Email

Creating New Notification Configuration

Post-Service Notification
Notify Customers about Services recently completed on their property

Name your notification *
Example Post-Service Email 1

Notification type
 Email
 SMS

Sending Preferences
Send
Immediately After service is posted

Recipient Filters Manage Filters

No filters added. Select Manage Filters to add required filters.

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	▼

Cancel Save

Example Pre-Service Email

The mockup shows a complete email layout. At the top is the Super Green logo and a 'Log In' link. Below is a dark blue header with 'Service Reminder'. The main body contains a 'SERVICE REMINDER' and 'ACCOUNT NO: 10783', followed by a personalized message and a list of services to be performed (LATE SPRING APPLICATION). A blue button labeled 'Confirm Your Appointment' is prominent. Below this is a 'Meet your technician!' section featuring a profile for Joseph Olson, a Lawn Care Specialist. The footer includes links for 'Signup for AutoPay', 'Pay Your Bill', and 'Contact Us', the phone number '(800) 422-7478', an unsubscribe link, and social media icons for Facebook, X, and Instagram.

This section highlights the personalized messaging and the confirmation button. It shows the text: 'Hello John Smith 123 Main St St Super Green Livonia will be servicing your property on. Please ensure the service area is accessible and clear of any obstructions.' Below this, a grey box lists the services: 'We will be performing the following: LATE SPRING APPLICATION'. A blue button with the text 'Confirm Your Appointment' is positioned below the list.

Add your messaging and option to confirm appointment

This section shows the footer information. It features three links: 'Signup for AutoPay', 'Pay Your Bill', and 'Contact Us'. Below these is the phone number '(800) 422-7478'. A line of text reads: 'If you'd rather not receive future emails from Super Green Livonia, unsubscribe here'. At the bottom are social media icons for Facebook, X, and Instagram.

Add customer portal info and social links to footer.

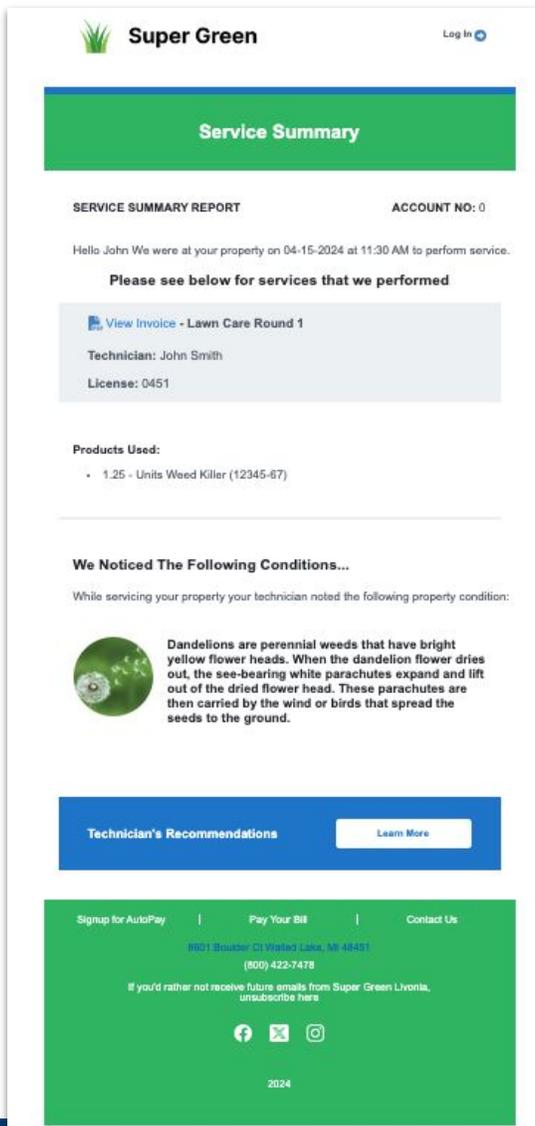
This section shows the top of the email. It features the Super Green logo on the left and a 'Log In' link on the right. Below the logo area is a dark blue horizontal bar with the text 'Service Reminder' in white.

Add logo and brand colors to header

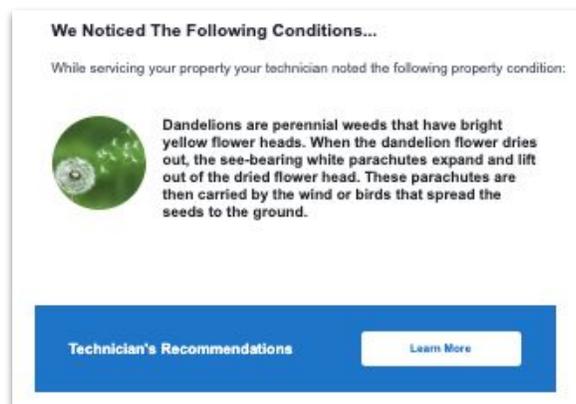
This section shows the 'Meet your technician!' section. It features a circular profile picture of Joseph Olson. To the right of the photo, the name 'JOSEPH OLSON' is listed. Below the name is a paragraph of text: 'Meet Joe Olson, a seasoned Lawn Care Specialist with an impressive 16 years of hands-on experience in creating lush, vibrant landscapes. Born with a passion for the outdoors, Joe has dedicated his career to transforming lawns into thriving green spaces that not only enhance curb appeal but also contribute to the overall well-being of communities.'

Introduce your technician

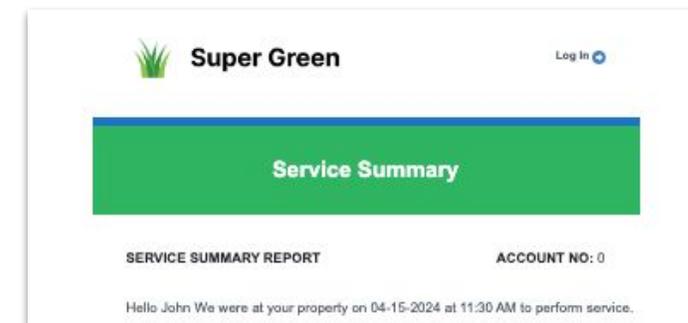
Example Post-Service Email



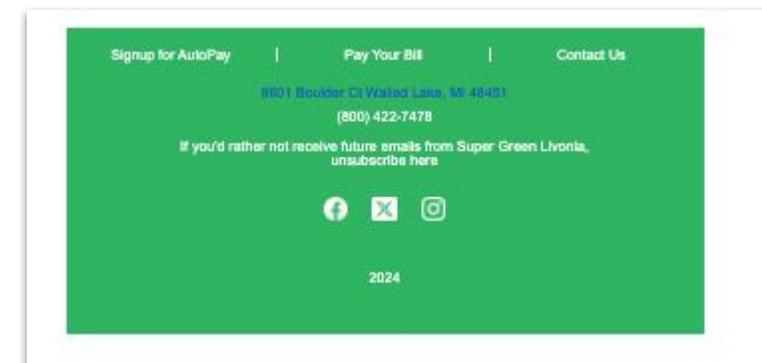
Add invoice and services performed/products used



Include conditions and technician recommendations for upsell



Add logo and brand colors to header, customize messaging



Add links in footer for autopay, pay your bill and more

Example Payment Reminder Email

The image shows a full email layout for Super Green. At the top left is the Super Green logo with a grass icon and a 'Log In' link. Below this is a green banner with the text 'Payment Reminder'. The main body of the email contains the text: 'PAYMENT REMINDER ACCOUNT NO: 0', followed by a message: 'Hello John Just a reminder, we recently performed service or charged an installment to your account at: 123 Main St Anytown MI 48108 We have not yet received payment. Your account has a balance of \$70.00. You can use this message to conveniently make payment arrangements. Click this link to view and pay your account on our website'. Below the message is a blue 'Make Payment' button. At the bottom, there is a green footer with links for 'Signup for AutoPay', 'Pay Your Bill', and 'Contact Us', the address '8601 Boulder Ct Walled Lake, MI 48451', phone number '(800) 422-7478', social media icons for Facebook, X, and Instagram, and the year '2024'.

PAYMENT REMINDER ACCOUNT NO: 0

Hello John Just a reminder, we recently performed service or charged an installment to your account at: 123 Main St Anytown MI 48108 We have not yet received payment. Your account has a balance of \$70.00. You can use this message to conveniently make payment arrangements. Click this link to view and pay your account on our website

Customize your payment reminder messaging.

Signup for AutoPay | Pay Your Bill | Contact Us

8601 Boulder Ct Walled Lake, MI 48451
(800) 422-7478

Facebook, X, Instagram icons

2024

Customize header and footer with brand colors and logo. Plus, links for payments, auto-pay and more.

Make Payment

If you have already made the payment, please disregard this message. We thank you for your prompt attention to this matter.

Drive customers directly to a payment portal

Example New Service Email

The full email layout for Super Green. It features a green header with the logo and a 'Log In' link. Below is a green 'Service Confirmation' banner. The main content area includes a 'NEW SERVICE REPORT' header, account number, and a table for 'Service Address' and 'Billing Address'. A paragraph of text follows, then a 'Service Description' table with a subtotal. A 'Pre-Pay and Save!' banner is present, followed by a footer with navigation links, contact information, and social media icons.

NEW SERVICE REPORT ACCOUNT NO: 0

Service Address	Billing Address
Property Management Corp Mr. John Doe 123 Main St Anytown, MI 48108	Property Management Corp Mr. John Doe 123 Main St Anytown, MI 48108

We are excited to provide you with service at 123 Main St, Anytown, MI 48108. We will work diligently to provide you an experience and results that are best in class!

Custom message and property/billing confirmation

Service Description:

DESCRIPTION	SUBTOTAL
Lawn Care Program 5 Rounds	\$350.00
Season Total	\$350.00
Additional Discounts	\$14.00
Tax	\$16.80
Total Charge	\$352.80
Pay Today & Save	\$17.65
Prepay Amount	\$335.15

Service and cost description

Pay Today & Save	\$17.65
Prepay Amount	\$335.15

[Pre-Pay Now](#)

Pre-Pay and Save!
Pre-pay Today and Save \$17.65

Add pre-pay offer and links to customer payment portal

Super Green Log In

Service Confirmation

Customize header/footer with links for payment options and more

Example Service Not Performed

Super Green [Log In](#)

Service Alert

SERVICE ALERT **ACCOUNT NO:1**

Hello John We apologize that your service couldn't be completed. Due to today's weather conditions or other unforeseen conditions, we were unable to complete your scheduled service as planned. Weather permitting, we will reschedule your service at the next available date. We are sorry for any inconvenience and look forward to servicing your property soon.

We were not able to perform the following:

- ✓ Tick Control
- Inclement Weather
- ✓ Grub Treatment
- Gate was locked

[Signup for AutoPay](#) | [Pay Your Bill](#) | [Contact Us](#)

Super Green Grand Rapids

If you'd rather not receive future emails from Super Green Grand Rapids, [unsubscribe here](#)

2026

Hello John We apologize that your service couldn't be completed. Due to today's weather conditions or other unforeseen conditions, we were unable to complete your scheduled service as planned. Weather permitting, we will reschedule your service at the next available date. We are sorry for any inconvenience and look forward to servicing your property soon.

Custom message body. Create multiple version for different SNP reasons

We were not able to perform the following:

- ✓ Tick Control
- Inclement Weather
- ✓ Grub Treatment
- Gate was locked

List Service And Reason Not Performed

Super Green [Log In](#)

Service Alert

Customize header and footer with brand colors and logo. Plus, links for payments, auto-pay and more.

[Signup for AutoPay](#) | [Pay Your Bill](#) | [Contact Us](#)

Super Green Grand Rapids

If you'd rather not receive future emails from Super Green Grand Rapids, [unsubscribe here](#)

2026

Example Expired Credit Card

 Super Green

[Log In](#)

Expiring Credit Card

PAYMENT ALERT

ACCOUNT NO:0

Dear John

This email is to inform you that your current payment method on file for your Super Green Grand Rapids account has either expired or is due to expire soon. To ensure uninterrupted service and avoid any disruption, please log into your account on our website to update your payment information. Alternatively, you may contact our office directly at during business hours, and a representative will be happy to assist you. We appreciate your prompt attention to this matter.

[Signup for AutoPay](#)

[Pay Your Bill](#)

[Contact Us](#)

Super Green Grand Rapids

If you'd rather not receive future emails from Super Green Grand Rapids,
[unsubscribe here](#)

2026

Dear John

This email is to inform you that your current payment method on file for your Super Green Grand Rapids account has either expired or is due to expire soon. To ensure uninterrupted service and avoid any disruption, please log into your account on our website to update your payment information. Alternatively, you may contact our office directly at during business hours, and a representative will be happy to assist you. We appreciate your prompt attention to this matter.

Custom message body. Create multiple version to have different message body content for separate branches or days until expiration.

 Super Green

[Log In](#)

Service Alert

Customize header and footer with brand colors and logo. Plus, links for payments, auto-pay and more.

[Signup for AutoPay](#)

[Pay Your Bill](#)

[Contact Us](#)

Super Green Grand Rapids

If you'd rather not receive future emails from Super Green Grand Rapids,
[unsubscribe here](#)

2026

Customer Notifications

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

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

Notification Name	Notification Status	Type	Channel	Sent	Failed	Credits
Joe's Test 1 Day Before Service Email	Active	Before Service Email	Email	1	0	1
Joe's Test After Service Email	Active	After Service Email	Email	1	0	1
Joe's Test Pre-Service SMS	Active	Before Service Sms	SMS	2	0	2
Test Post-Service SMS	Archived	After Service Sms	SMS	1	0	1
Joe's Test Post-Service SMS	Active	After Service Sms	SMS	1	0	1
Joe's Test Service Confirmation Email	Active	Service Confirmation Email	Email	1	0	1
Joe's Test Service Confirmation SMS	Active	Service Confirmation Sms	SMS	1	0	1

Customer Notifications

Live Demo

Session Feedback

- 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

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