

We developed an email solution that will trigger communication events throughout the life cycle of your customer's Service Order. This includes notifications specific to order confirmation, schedule or reschedule dates and times, appointment reminders, and service completion or cancellation.

Start from your Dashboard.

The screenshot shows the ServiceLive dashboard with the following callouts:

- 1. Hover your mouse over the Administrator Office tab.** (Points to the 'Administrator Office' tab in the top navigation bar)
- 2. In a continuous motion, slide your mouse down and hover over Maintenance Panel.** (Points to the 'Maintenance Panel' link in the right-hand sidebar menu)
- 3. Click Email & Survey Configuration.** (Points to the 'Email & Survey Configuration' link in the right-hand sidebar menu)

Informational Note: The information that displays on your Dashboard view is dependent on the permissions that were assigned to you when you were added to the account as a user. ServiceLive is optimized for Google Chrome and Mozilla Firefox browsers. Do not use Internet Explorer. If you do not see these options, contact your ServiceLive account Administrator for help!

The Email Notification & Configuration Setup page will display. Create an email header.

The screenshot shows the 'Email Notification & Configuration Setup' page with the following callout:

- 1. Enter your company name and upload your logo.** This is how your customers will know the email is from you. (Points to the 'Buyer Name' and 'Upload Buyer Logo' input fields)

We offer different types of email notifications.

The screenshot shows the 'Email Notifications: Email Events & Content' section with the following callout:

- Choose an email to configure, and set it to Active to enable the notification, or leave it Inactive if you don't need it right now. You can also click the Preview link to see how the email will display for your customer.** (Points to the 'Active' radio button, 'Inactive' radio button, and 'Preview' link for the 'Order Confirmation Email' row)

Notification Type	Active	Inactive	Preview
+ Order Confirmation Email	<input checked="" type="radio"/>	<input type="radio"/>	Preview
+ Schedule Confirmation Email	<input checked="" type="radio"/>	<input type="radio"/>	Preview
+ Reschedule Confirmation Email	<input checked="" type="radio"/>	<input type="radio"/>	Preview
+ Cancellation Confirmation Email	<input checked="" type="radio"/>	<input type="radio"/>	Preview
+ Appointment Reminder Email	<input checked="" type="radio"/>	<input type="radio"/>	Preview
+ CSAT & NPS Surveys	<input checked="" type="radio"/>	<input type="radio"/>	Preview

Select an email to configure.

1. Choose an email to configure, and the window will expand. Remember to use the **Active**, **Inactive**, and **Preview** options!

2. Email Notifications: Email Events & Content

Select the notification(s) you want to send - Set each template you'll be using to 'Active' and enter a **Signature** for each one!

Some templates let you decide when the message is triggered, and you can see how your message will display by clicking on the 'Preview' link.

- Order Confirmation Email Active Inactive [Preview](#)

Email Content (Not Editable):

Hi **[FIRST_NAME]**,

We will be scheduling a Service Pro to visit you at one of the preferred date(s) and time(s) that you'd requested.

[TIME_SLOTS]

We'll be in touch as soon as we have confirmed the actual date and time for your visit.

If you have any questions or need to make any changes to the appointment, please contact us using the info below. Reference your Service Order Number **[SO_ID]**.

Signature *

Thank you,
ServiceLive Training
888-549-0640
Support@servicelive.com

To maximize your experience, download our product app for iOS or Android before your appointment, and create your free user account. Our Service Pro will assist with adding your new product device to your account.

This is how the email will display to your customers. The fields in bold will auto-fill with details from the customer's Service Order. This field is read-only and cannot be edited.

2. Enter a **signature** to let your customers know the email is from your company. You can even include a message to your customers, with steps on how to prepare for their service event.

Set up email triggers.

2. Email Notifications: Email Events & Content

Select the notification(s) you want to send - Set each template you'll be using to 'Active' and enter a **Signature** for each one!

Some templates let you decide when the message is triggered, and you can see how your message will display by clicking on the 'Preview' link.

+ Order Confirmation Email Active Inactive [Preview](#)

- Schedule Confirmation Email Active Inactive [Preview](#)

Email Content (Not Editable):

Hi **[FIRST_NAME]**,

We have a Service Pro scheduled to take care of your **[SO_TITLE]** at the date and time below that you'd requested. Your Service Pro will be contacting you by phone to confirm the details, if they've not already done so.

Service Details

Date: **[DATE_SERVICE]**

Time: **[TIME_SERVICE]**

Service Professional: **[PROVIDER_FIRM_NAME]** / **[PROVIDER_PHONENUMBER]**

Customer Rated: **★★★★★**

If you have any questions or need to make any changes to the appointment, please contact us using the info below. Reference your Service Order Number **[SO_ID]**.

Signature *

Thanks,
ServiceLive Training
888-549-0640
Support@servicelive.com

Service Order status event for triggering email*

Blank
 Pre-Call Completed
 Schedule Confirmed

Some email configurations even let you choose **when** the customer's Service Order (**substatus**) will **trigger** the email notification.

Get a preview.

2. Email Notifications: Email Events & Content

Order Confirmation Email

Hi **[FIRST_NAME]**,

We will be scheduling a Service Pro to visit you at one of the preferred date(s) and time(s) that you'd requested.

[TIME_SLOTS]

We'll be in touch as soon as we have confirmed the actual date and time for your visit.

If you have any questions or need to make any changes to the appointment, please contact us using the info below. Reference your Service Order Number **[SO_ID]**.

Thank you,
ServiceLive Training
888-549-0640
Support@servicelive.com

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Website | Support | Store | Terms & Conditions | Privacy Policy

When you click the **Preview** link, this pop-up window will let you see how the email will display to your customers. The fields in bold will auto-fill with details from the customer's Service Order.

Configure survey(s).

1. Configure **customer surveys**, and set them to **Active** or **Inactive**. You can also click the **Preview** link here to see how the email will display for your customer.

+ Appointment Reminder Email Active Inactive [Preview](#)

- CSAT & NPS Surveys Active Inactive [Preview](#)

Survey Type *

- Send Customer Satisfaction (CSAT) Survey only
- Send Net Promoter (NPS) Survey only
- Send Both - Prioritize Customer Satisfaction (CSAT) over Net Promoter Score (NPS) Survey
- Send Both - Prioritize Net Promoter Score (NPS) over Customer Satisfaction (CSAT) Survey

2. Choose a **Customer Satisfaction (CSAT)**, and/or a **Net Promoter (NPS) Survey**. These go out after the Provider has completed the order for payment, or after you've paid and closed the order ([step 4](#)).

After your customer completes the survey(s), the results will display in the Service Order's **View Ratings** tab.

Net Promoter Score (NPS) surveys can be used to gauge the loyalty of customer relationships, and works as an alternative to traditional customer satisfaction research.

Prioritize CSAT over NPS means the CSAT email will be sent to the customer – once they click a star rating, they'll be redirected to another landing page where they can view the rating they provided, change it if they would like, and provide additional comments. The NPS survey will also display on the same landing page (underneath the CSAT rating), where they can submit a 0-10 rating along with feedback at the same time.

Prioritize NPS over CSAT means the NPS email will be sent to the customer – once they click a 0-10 rating, they'll be redirected to another landing page where they can view the rating they provided, change it if they would like, and provide additional comments. The CSAT survey will also display on the same landing page (underneath the NPS rating), where they can submit a 1-5 star rating along with feedback at the same time.

This is how the email will display to your customers. The fields in bold will auto-fill with details from the customer's Service Order. This field is read-only and cannot be edited.

When the customer clicks a **star** in the email, they will be re-directed to a survey page where they'll be able to enter additional details and comments.

Their rating will be captured here when they click a **star** from the email, but they must click **Submit** at the end of their survey to capture any comments or changes.

Email Content (Not Editable):

Hi **[FIRST_NAME]** **[LAST_NAME]**,

Thank you for scheduling your service with **[BUYER_NAME]**.

Please rate the Service Pro who took care of you today.

Low ☆ ☆ ☆ ☆ ☆ High

Signature *

Thank you,
ServiceLive Training
888-549-0640
Support@servicelive.com

3. Enter a **signature** to let your customers know the email is from your company.

4. Choose **when** the customer's Service Order will **trigger** the email notification.

Service Order status event for triggering email*

- Completed
- Closed

Create an email footer, and save all of your changes.

1. Configure your **footer** with links to your **social media** and **customer support** pages, and include your company's **Terms & Conditions** and **Privacy Policy**.

When you enter links in these fields, the associated social media icons and webpage hyperlinks will display in the email's footer.

Facebook Twitter Instagram Pinterest Google+ Company Customer Support Store Page Terms & Conditions Privacy Policy

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Website | Support | Store | Terms & Conditions | Privacy Policy

Fields that are left blank will not display the social media icon or webpage hyperlink in the email's footer. For example, if only two social media links, a company homepage link, and a company support page link are entered, then only those icons and links will display.

Twitter Instagram

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Website | Support |

When no links are entered at all, then only the required **address** ([step 2](#)) will be the only information displayed in the footer.

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3. Email Footer: Links and Information

Let your customers stay connected with you by including links to your social media and customer support pages in the **Footer!** You can also include Terms & Conditions and a Privacy Policy!

Facebook

Twitter

Instagram

Pinterest

Google+

Company

Customer Support

Store Page

Terms & Conditions

Privacy Policy

Address *

3. Click **Submit**.

Use | Privacy Policy | California Privacy Policy | Provider Agreement | Buyer Agreement

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Unable to fulfill buyer requests in the following states/U.S. Territories: AS, FM, GU, HI, MP, PW, VI

ACCREDITED BUSINESS
COMMON SENSE SECURITY

2. Enter your company's **address**.

Everything is set up, and ready to go!

The page will refresh, and a prompt will let you know your changes have successfully saved, or if any errors occurred.

Welcome, ServiceLive Training! #26901 Not Rated
Training | Community | Blog | Support | Contact Us | Logout

Dashboard Service Order Monitor ServiceLive Wallet Workflow Monitor Explore The Marketplace Administrator Office

Update Successful. Your changes have been saved.

Email Notification & Configuration Setup

We have set up configurable email templates that let you stay connected with your customer throughout the lifecycle of their Service event. Our system sends your email notifications in a format that lets you enter your Company **Name & Logo** so your customer knows it's an important message, enter a **Signature** for each template, and configure a **Footer** with links to your social media pages!

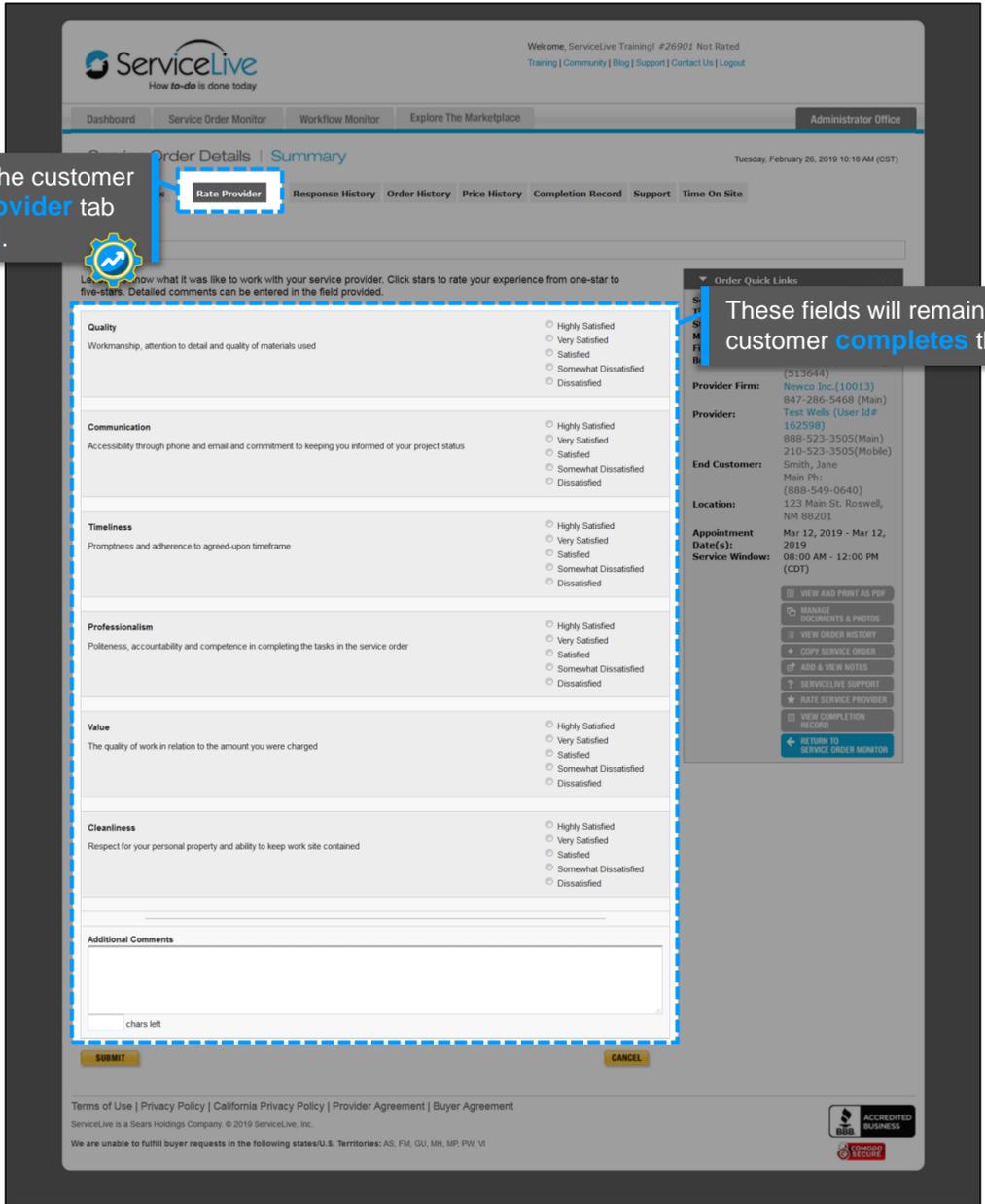
Required fields must be filled out before changes can be saved, and each template must be set to 'Active' for the system to know which message(s) you want to send out.

1. Email Header: Buyer Name & Logo

Let your customers know who is reaching out to them! The **Name & Logo** configured in this section will display in your email as the "sender". You can also promote your brand by uploading your logo!

Here's an example of an incomplete CSAT survey before we implemented these changes – incomplete surveys sent out before April 2019 will remain in this original format.

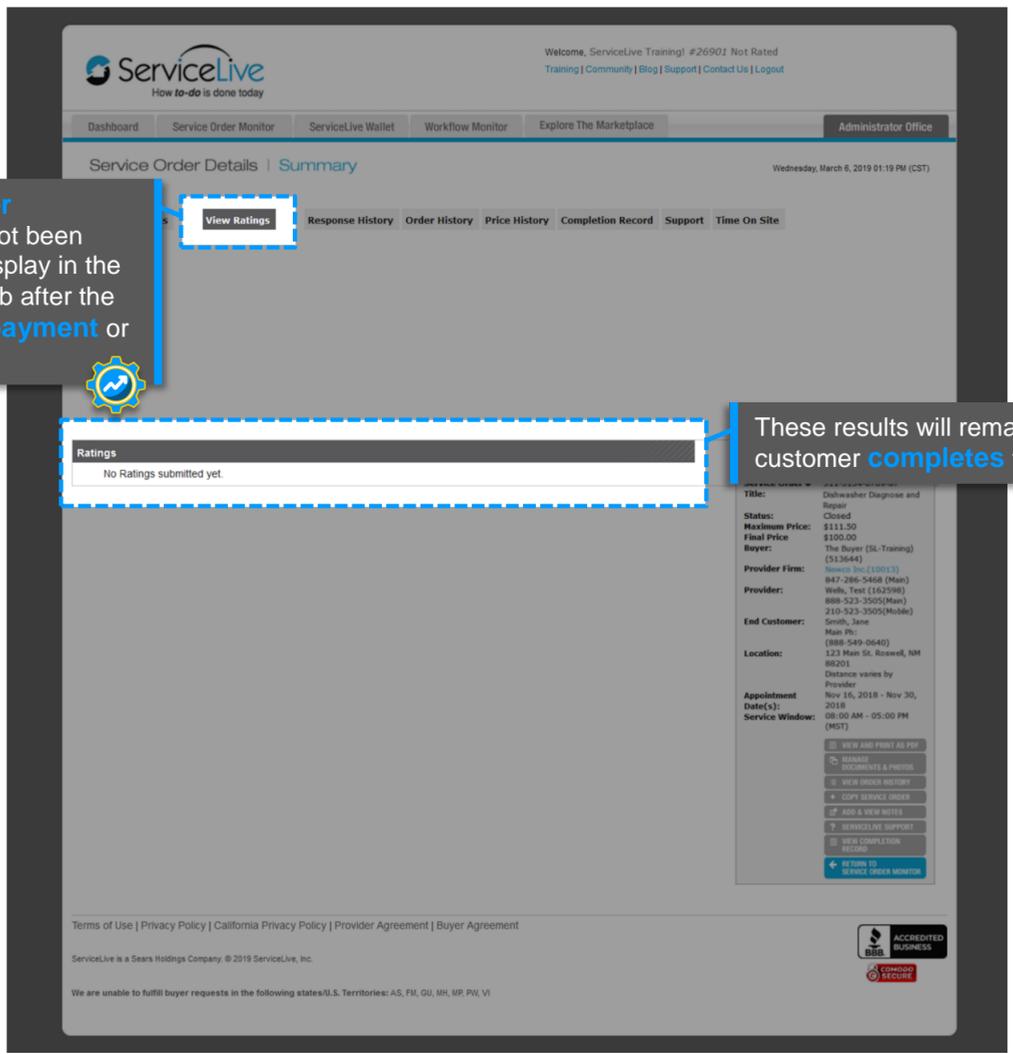
Surveys that have not been completed by the customer will display in the Service Order's **Rate Provider** tab after the order has been **closed and paid**.



These fields will remain blank until the customer **completes** their survey.

Here's an example of an incomplete CSAT survey after we implemented these changes – incomplete surveys sent out after April 2019 will display in this new format.

Depending on the survey's **trigger** configuration, surveys that have not been completed by the customer will display in the Service Order's **View Ratings** tab after the order has been **completed for payment** or **closed and paid**.



These results will remain blank until the customer **completes** their survey.

Here's an example of a complete CSAT survey before we implemented these changes – complete surveys submitted before April 2019 will remain in this original format.

Surveys that have been completed by the customer will display in the Service Order's **View Ratings** tab after the order has been **closed and paid**.

Service Order # 579-3913-8430-10
Title: Diagnostic Visit - C-Wire
Status: Closed
Maximum Price: \$112.40
Final Price: \$112.40
Buyer: The Buyer (SL-Training) (513644)
Provider Firm: Newco Inc.(10013)
Provider: 847-286-5468 (Main)
End Customer: Test Wells (User Id# 162598)
Location: 888-523-3505(Main)
Appointment Date(s): 210-523-3505(Mobile)
Service Window: Smith, Jane
 Main Ph: (888-549-0640)
 123 Main St. Roswell, NM 88201
 Feb 2, 2019 - Feb 2, 2019
 08:30 AM - 10:30 AM (CST)

Ratings
 Service Provider: 4.17 Stars

Quality Workmanship, attention to detail and quality of materials used	Very Satisfied ★★★★☆
Communication Accessibility through phone and email and commitment to keeping you informed of your project status	Highly Satisfied ★★★★★
Timeliness Promptness and adherence to agreed-upon timeframe	Somewhat Dissatisfied ★★☆☆☆
Professionalism Politeness, accountability and competence in completing the tasks in the service order	Highly Satisfied ★★★★★
Value The quality of work in relation to the amount you were charged	Very Satisfied ★★★★☆
Cleanliness Respect for your personal property and ability to keep work site contained	Highly Satisfied ★★★★★

Additional Comments
The service was great, thank you!

These results will display after the customer has **completed** their survey.

Here's an example of a complete CSAT survey after we implemented these changes – complete surveys submitted after April 2019 will display in this new format.

Depending on the survey's **trigger** configuration, surveys that have been completed by the customer will display in the Service Order's **View Ratings** tab after the order has been **completed for payment**, or **closed and paid**.

Service Order # 579-3913-8430-10
Title: Diagnostic Visit - C-Wire
Status: Closed
Maximum Price: \$111.50
Final Price: \$100.00
Buyer: The Buyer (SL-Training) (513644)
Provider Firm: Newco Inc.(10013)
Provider: 847-286-5468 (Main)
End Customer: Test Wells (User Id# 162598)
Location: 888-523-3505(Main)
Appointment Date(s): 210-523-3505(Mobile)
Service Window: Smith, Jane
 Main Ph: (888-549-0640)
 123 Main St. Roswell, NM 88201
 Distance varies by Provider
 Nov 16, 2018 - Nov 30, 2018
 08:00 AM - 05:00 PM (MST)

Ratings
 Service Provider: 1 Ratings

Service Pro's rating by customer:
 ★ ★ ★ ★ ☆

Survey options selected by customer:

ARRIVE ON TIME	EXPLAIN SERVICE	OFFER SOLUTIONS
LEAVE WORK AREA CLEAN	COMPLETE SERVICE	ACT COURTEOUSLY

Comments
The service was great, thank you!

These results will display after the customer has **completed** their survey.

Questions?

Contact our Support Team at **888-549-0640**, option 5
 Mon - Fri, 8am to 7pm Central Standard Time
 Sat, 8am to 5pm Central Standard Time

You can also email us at **Support@servicelive.com**
 Mon - Fri, 8am to 5:30pm Central Standard Time