

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. The top navigation bar includes tabs for Dashboard, Service Order Monitor, ServiceLive Wallet, Explore The Marketplace, and Administrator Office. The Administrator Office tab is highlighted. The main dashboard area contains sections for Service Orders, Vital Statistics, ServiceLive Wallet, and a sidebar with various tools. Annotations point to the Administrator Office tab, the Maintenance Panel in the sidebar, and the Email & Survey Configuration option in the sidebar.

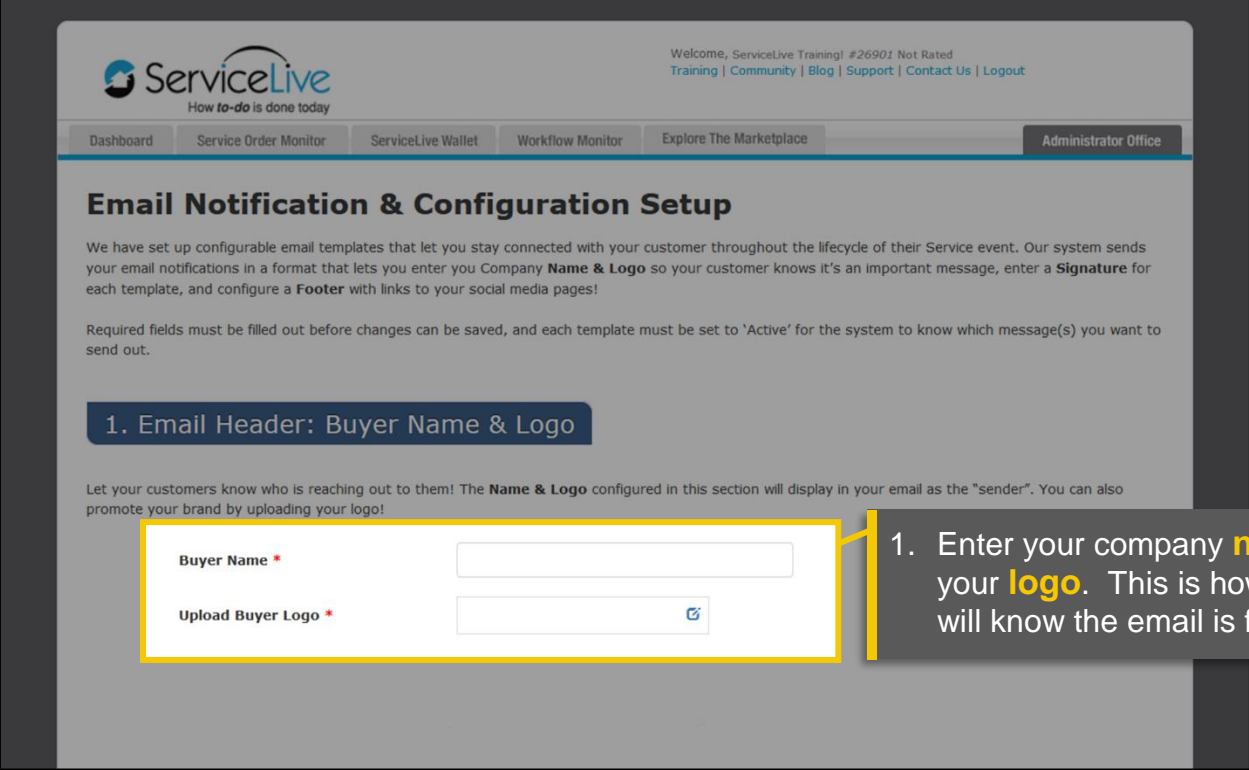
1. Hover your mouse over the **Administrator Office** tab.

2. In a continuous motion, slide your mouse down and hover over **Maintenance Panel**.

3. Click **Email & Survey Configuration**.

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!

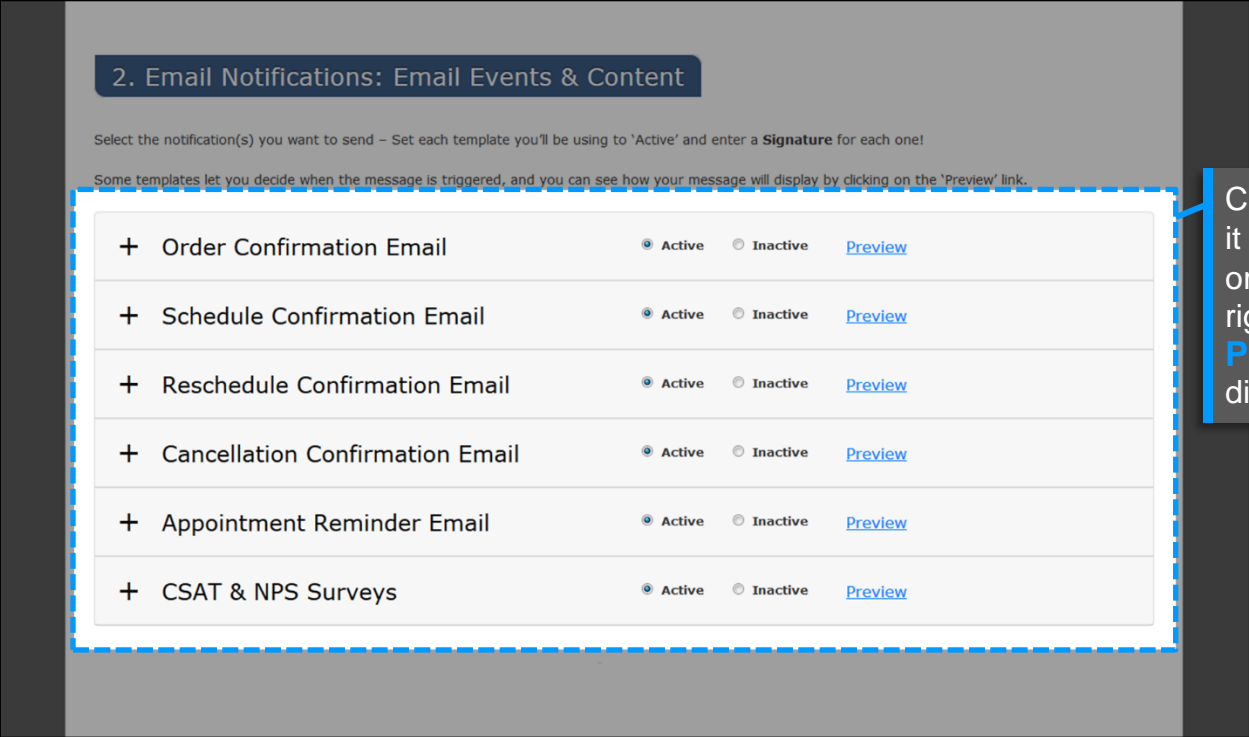
The Email Notification & Configuration Setup page will display. Create an email header.



The screenshot shows the 'Email Notification & Configuration Setup' page. The page has a header section for '1. Email Header: Buyer Name & Logo'. Below this, there are input fields for 'Buyer Name' and 'Upload Buyer Logo'. An annotation points to the 'Buyer Name' field.

1. Enter your company **name** and upload your **logo**. This is how your customers will know the email is from you.

We offer different types of email notifications.



The screenshot shows the 'Email Notifications: Email Events & Content' page. It features a table with various email notification templates. Each row has a plus icon, the template name, radio buttons for 'Active' and 'Inactive', and a 'Preview' link. The 'Order Confirmation Email' row is highlighted with a dashed blue border.

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

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.

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. 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.

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.

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.

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.

2. Email Notifications: Email Events & Content

+ Order Confirmation Email

Active

Inactive

Preview

- Schedule 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]**.

Thank you,

ServiceLive Training

888-549-0640

Support@servicelive.com

Signature *

Thank you,

ServiceLive Training

888-549-0640

Support@servicelive.com

Service Order status event for triggering email*

Blank

Pre-Call Completed

Schedule Confirmed

Order Confirmation Email

ServiceLive

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

7353 NW Loop 410 San Antonio, TX 78245

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

+ Schedule Confirmation Email

Active

Inactive

Preview

Configure Email Notifications and Customer Surveys

Page 2 of 5

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**.

ServiceLive
How to-do is done today

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

Dashboard | Service Order Monitor | Workflow Monitor | Explore The Marketplace | Administrator Office

Service Order Details | Summary

Tuesday, February 26, 2019 10:18 AM (CST)

Rate Provider | Response History | Order History | Price History | Completion Record | Support | Time On Site

Let us know what it was like to work with your service provider. Click stars to rate your experience from one-star to five-stars. Detailed comments can be entered in the field provided.

Quality
Workmanship, attention to detail and quality of materials used

Communication
Accessibility through phone and email and commitment to keeping you informed of your project status

Timeliness
Promptness and adherence to agreed-upon timeframe

Professionalism
Politeness, accountability and competence in completing the tasks in the service order

Value
The quality of work in relation to the amount you were charged

Cleanliness
Respect for your personal property and ability to keep work site contained

Additional Comments

chrs left

SUBMIT CANCEL

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

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We are unable to fulfill buyer requests in the following states/U.S. Territories: AS, FM, GU, MH, MP, PW, VI

Order Quick Links

Provider Firm: (513644)
Newco Inc. (10013)
847-286-5468 (Main)
Test Wells (User Id# 162598)
888-523-3505(Main)
210-523-3505(Mobile)

Provider: Smith, Jane
Main Ph: (888-549-0640)
Location: 123 Main St. Roswell, NM 88201

Appointment Date(s): Mar 12, 2019 - Mar 12, 2019
Service Window: 08:00 AM - 12:00 PM (CDT)

VIEW AND PRINT AS PDF
MANAGE DOCUMENTS & PHOTOS
VIEW ORDER HISTORY
COPY SERVICE ORDER
ADD & VIEW NOTES
SERVICE LIVE SUPPORT
RATE SERVICE PROVIDER
VIEW COMPLETION RECORD
RETURN TO SERVICE ORDER MONITOR

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**.

ServiceLive
How to-do is done today

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

Service Order Details | Summary

Wednesday, March 6, 2019 01:19 PM (CST)

View Ratings | Response History | Order History | Price History | Completion Record | Support | Time On Site

Ratings
No Ratings submitted yet.

Title: Dishwasher Diagnose and Repair
Status: Closed
Maximum Price: \$111.50
Final Price: \$100.00
Buyer: The Buyer (SL-Training) (513644)
Provider Firm: Newco Inc. (10013)
Provider: Wells, Test (162598)
End Customer: Smith, Jane
Location: 123 Main St. Roswell, NM 88201
Appointment Date(s): Nov 16, 2018 - Nov 30, 2018
Service Window: 08:00 AM - 05:00 PM (MST)

VIEW AND PRINT AS PDF
MANAGE DOCUMENTS & PHOTOS
VIEW ORDER HISTORY
COPY SERVICE ORDER
ADD & VIEW NOTES
SERVICE LIVE SUPPORT
VIEW COMPLETION RECORD
RETURN TO SERVICE ORDER MONITOR

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

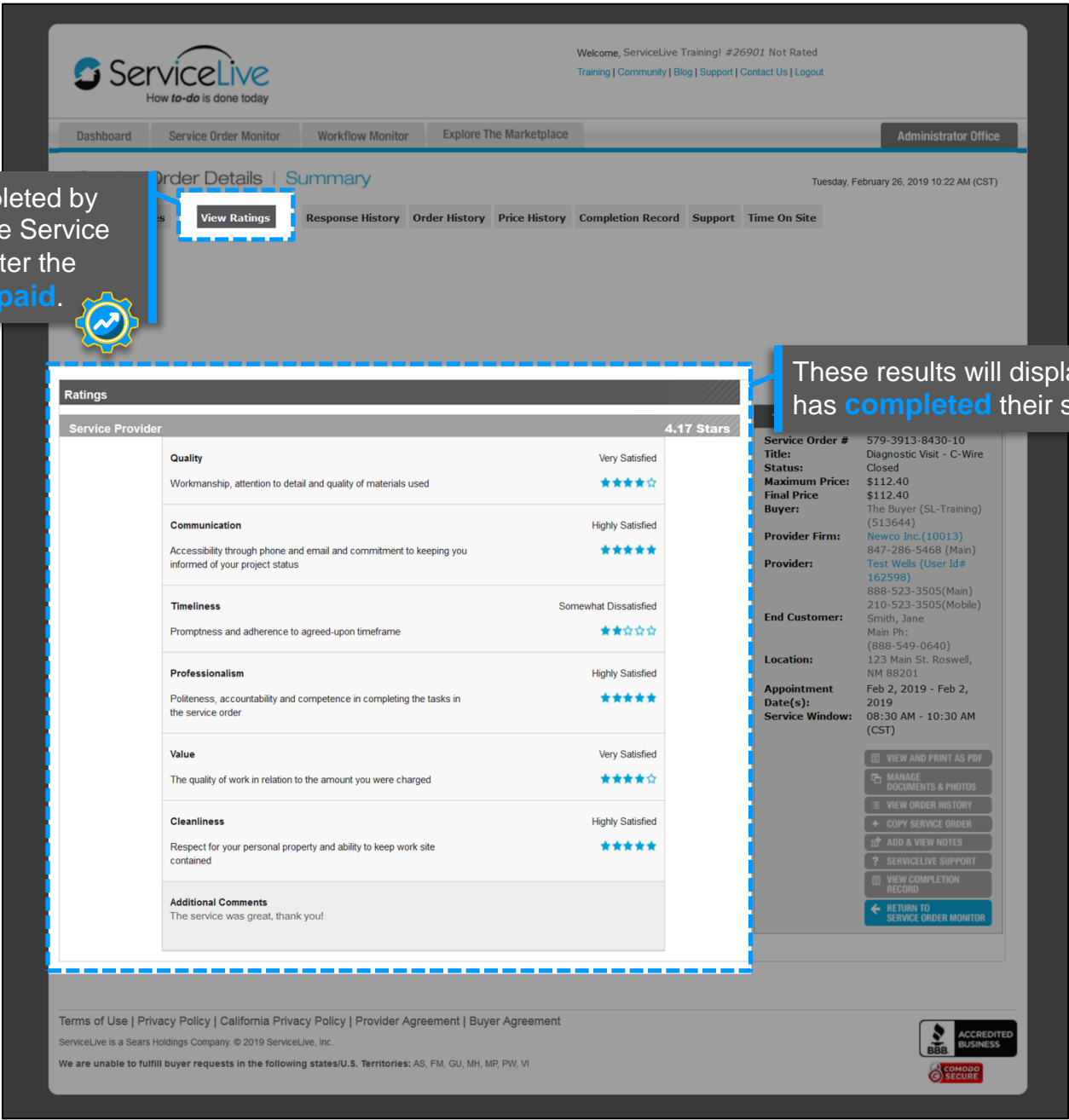
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We are unable to fulfill buyer requests in the following states/U.S. Territories: AS, FM, GU, MH, MP, PW, VI

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)
Test Wells (User Id# 162598)
888-523-3505(Main)
210-523-3505(Mobile)
End Customer: Smith, Jane
Main Ph: (888-549-0640)
123 Main St. Roswell, NM 88201
Location: 123 Main St. Roswell, NM 88201
Appointment Date(s): Feb 2, 2019 - Feb 2, 2019
Service Window: 08:30 AM - 10:30 AM (CST)

Ratings
Service Provider 4.17 Stars

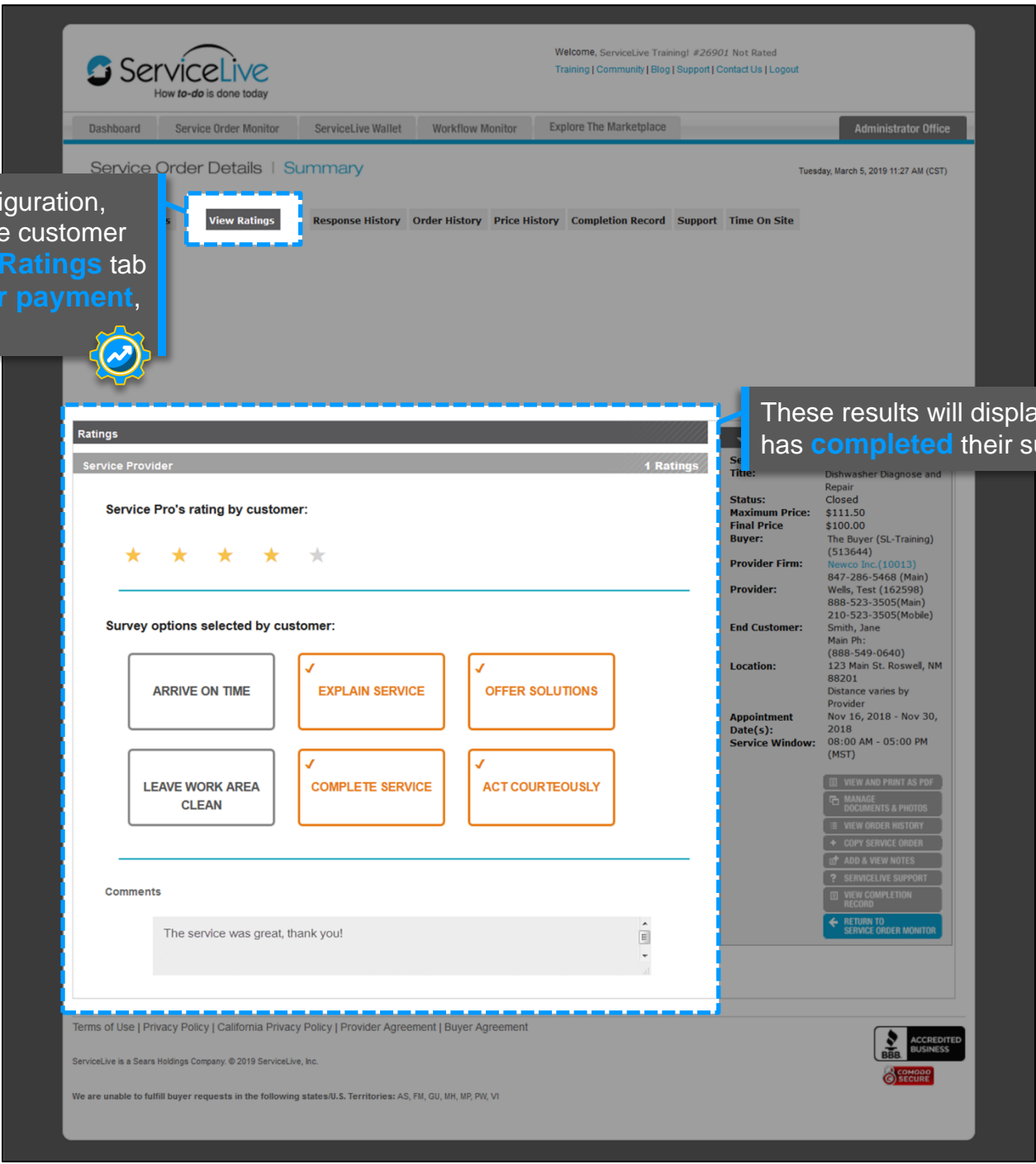
Quality Workmanship, attention to detail and quality of materials used	Very Satisfied ★★★★☆
Communication Accessibility through phone and email and commitment to keeping you informed of your project status	Highly Satisfied ★★★★★
Timeliness Promptness and adherence to agreed-upon timeframe	Somewhat Dissatisfied ★★★☆☆
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!	

VIEW AND PRINT AS PDF
MANAGE DOCUMENTS & PHOTOS
VIEW ORDER HISTORY
COPY SERVICE ORDER
ADD & VIEW NOTES
SERVICELIVE SUPPORT
VIEW COMPLETION RECORD
RETURN TO SERVICE ORDER MONITOR

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)
Wells, Test (162598)
888-523-3505(Main)
210-523-3505(Mobile)
End Customer: Smith, Jane
Main Ph: (888-549-0640)
123 Main St. Roswell, NM 88201
Location: 123 Main St. Roswell, NM 88201
Appointment Date(s): Nov 16, 2018 - Nov 30, 2018
Service Window: 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!

VIEW AND PRINT AS PDF
MANAGE DOCUMENTS & PHOTOS
VIEW ORDER HISTORY
COPY SERVICE ORDER
ADD & VIEW NOTES
SERVICELIVE SUPPORT
VIEW COMPLETION RECORD
RETURN TO SERVICE ORDER MONITOR

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