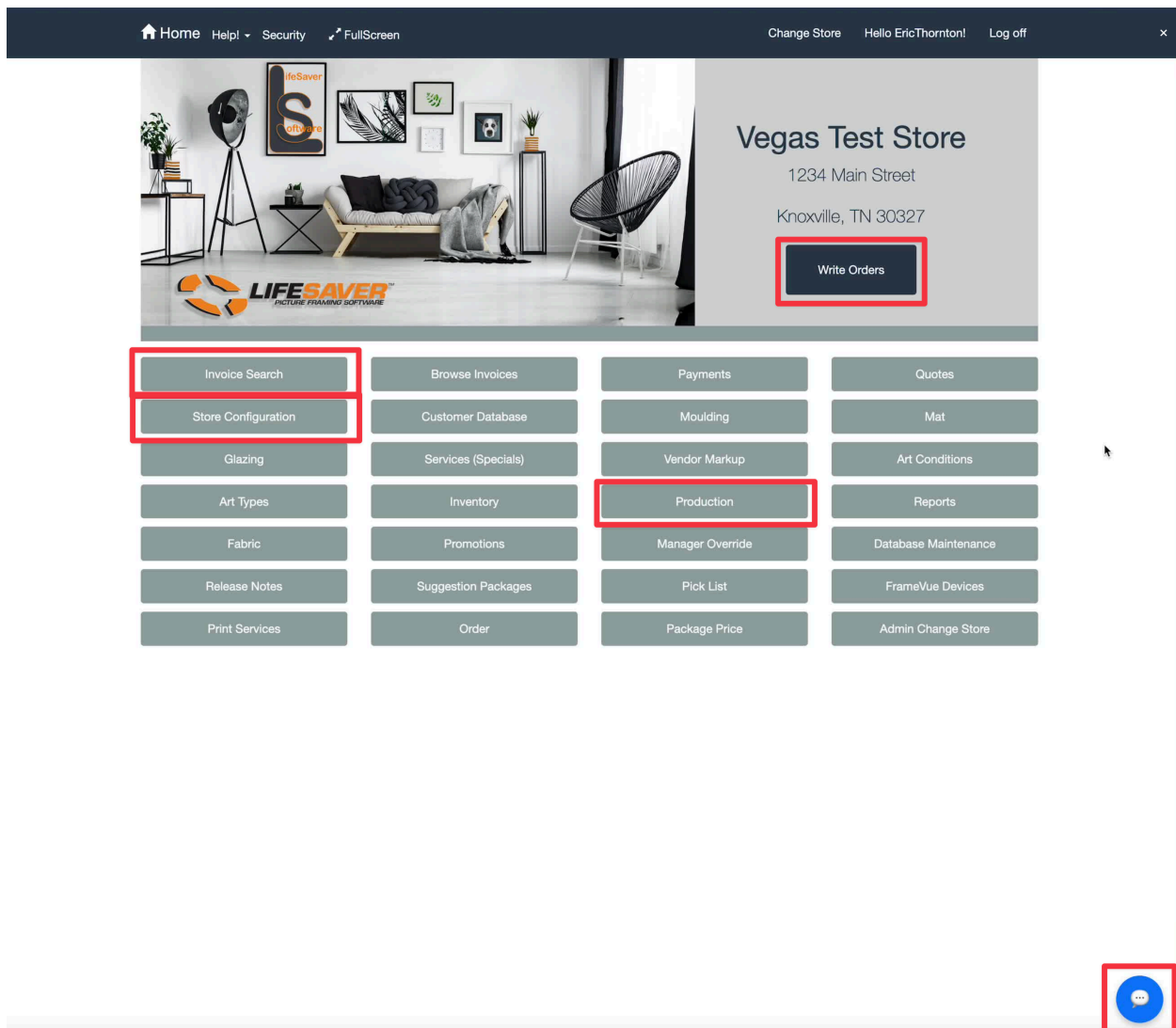


# A Guide to Using the LifeSaver Messaging Assistant Tools

## Accessing Features in the Messaging Assistant in Lifesaver

This guide focuses on where to access key features within the Messaging Assistant.



Before sending any SMS or emails to your customers, we encourage you to send test messages to yourself. This will give you better knowledge and expectations on what your customers will experience.

## 1. Sending Invoice Receipts

Sometimes you want an easy way to send a customer their receipt via SMS or Email. This is valuable if the customer is not there in person, if they have questions about what they paid for, or you want to save paper.

- **Invoice Search Page:**

- From the main page, click **Invoice Search**.
- Search for the customer or invoice.
- Click the "Other" button on the row for the invoice you would like to send.
- Choose to send a digital invoice (receipt) from the displayed options. If you have pay by link enabled, you will see that option here as well. (See Below)

### Invoice Search

Inv. #

W/O #

hoss

Description

Start Date

End Date

PO #

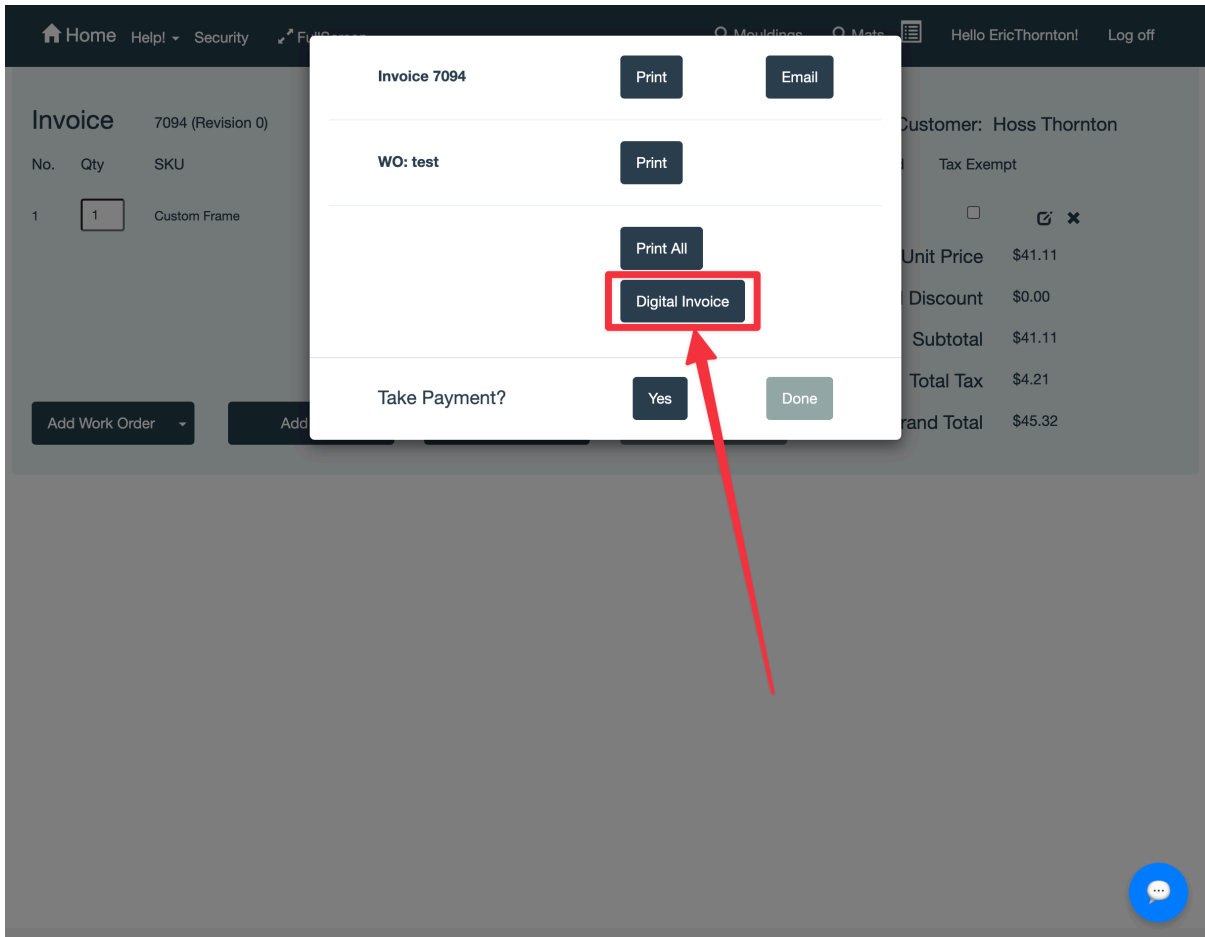
Search

☒ Show invoices with \$0.00 balance

Inv #	Rev	Customer	Date Created	Balance					Status	Cut Mat ID
7092	1	Hoss Thornton	2/6/2025	\$45.32	Pay	Edit	Print	Other	test - InProgress	11338557
7091	1	Hoss Thornton	2/6/2025	\$45.32	Pay	Edit	Print	Send Digital Invoice Send Online Payment Link Email Invoice		11338486
7090	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print			11322566
7089	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print	Void Invoice		11322240
7088	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print	Vallani File: Work Order: test		11322207
7087	1	Hoss Thornton	2/5/2025	\$221.64	Pay	Edit	Print	Upload CMC File: test		11321975
7074	1	Hoss Thornton	1/23/2025	\$89.30	Pay	Edit	Print	Return Previous Returns		11251926
7070	2	Hoss Thornton	1/21/2025	\$89.30	Pay	Edit	Print	Other	test - in-progress	11241732
7069	1	Hoss Thornton	1/17/2025	\$62.84	Pay	Edit	Print	Other	test - InProgress	11205480
7068	1	Hoss Thornton	1/17/2025	\$221.64	Pay	Edit	Print	Other	test - InProgress	11205459
7064	1	Hoss Thornton	1/15/2025	\$89.30	Pay	Edit	Print	Other	test - Assembled	11174385
7030	1	Hoss Thornton	10/30/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10747089
7025	1	Hoss Thornton	10/14/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10597457
7024	1	Hoss Thornton	10/14/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10597341
7019	1	Hoss Thornton	10/11/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10591671

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- A screen shows available contact methods (phone numbers and emails). Choose the method you would like to send. If a customer phone number or email does not match where they want it sent, you can change that within the modal. This is a common modal that you will see throughout the system.
- Order Creation Screen:**
  - Once you write a new order and go to invoice it, you will see an option to send a digital invoice. Once you click that, it will show you the phone number and email options.



## 2. Sending Digital Payment Links

It is not uncommon for customers to pay for something when they are not in the store. Rather than collecting a credit card number over the phone, you can easily send them a secure payment link where they can make a payment from their phone or computer. When the payment is collected, LifeSaver will record the payment so your records align.

To send a digital payment link

- Follow the same steps as for sending an invoice from the invoice search screen.
- Instead of the digital invoice option, select the option "Send Online Payment Link".

## Invoice Search

Inv. #

W/O #

hoss

Description

Start Date

End Date

PO #

Search

☒ Show invoices with \$0.00 balance

Inv #	Rev	Customer	Date Created	Balance					Status	Cut Mat ID
7092	1	Hoss Thornton	2/6/2025	\$45.32	Pay	Edit	Print	Other	test - InProgress	11338557
7091	1	Hoss Thornton	2/6/2025	\$45.32	Pay	Edit	Print	Send Digital Invoice		11338486
7090	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print	Send Online Payment Link		11322566
7089	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print	Email Invoice		11322240
7088	1	Hoss Thornton	2/5/2025	\$45.32	Pay	Edit	Print	Void Invoice		11322207
7087	1	Hoss Thornton	2/5/2025	\$221.64	Pay	Edit	Print	Vallani File: Work Order: test		11321975
7074	1	Hoss Thornton	1/23/2025	\$89.30	Pay	Edit	Print	Upload CMC File: test		11251926
7070	2	Hoss Thornton	1/21/2025	\$89.30	Pay	Edit	Print	Return		11241732
7069	1	Hoss Thornton	1/17/2025	\$62.84	Pay	Edit	Print	Previous Returns		11205480
7068	1	Hoss Thornton	1/17/2025	\$221.64	Pay	Edit	Print	Other	test - InProgress	11205459
7064	1	Hoss Thornton	1/15/2025	\$89.30	Pay	Edit	Print	Other	test - InProgress	11174385
7030	1	Hoss Thornton	10/30/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Assembled	10747089
7025	1	Hoss Thornton	10/14/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10597457
7024	1	Hoss Thornton	10/14/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10597341
7019	1	Hoss Thornton	10/11/2024	\$0.00	Pay/Refund	Edit	Print	Other	test - Delivered	10591671

Page: 1 >

## 3. Production Status Notifications

This gives you the ability to easily text or email your customers when the status of their work order changes. There is a setting with each status so you can choose which status' you want to send updates for. The most common use case will be enabling this setting for a "Ready For Pickup" type status.

- **Production Section:**
  - From the main page, click **Production**.
  - On the Production Status page, select **Manage Status**.

- Click “Manage” for the status you want the notification to be tied to.
- Check the box for sending the digital notification. Whenever a work order gets moved to that status, you will see a pop-up where you can choose to send that notification or not.

**Manage Status: Ready For Pickup**

Rule Name  Mat  Required? ☐ **Create**

Rules		
Name	Type	Required?
<p><b>Configure</b></p> <p><input type="checkbox"/> Work Orders can move to previous status</p> <p><input type="checkbox"/> Work Orders in this status have been assembled</p> <p><input type="checkbox"/> Work Orders in this status have been delivered</p> <p><input checked="" type="checkbox"/> Send digital notification to customer when moved to this status</p> <p><input checked="" type="checkbox"/> Send review link to customer when moved to this status</p>		

**Deactivate** **OK**

## 4. Two-way texting

Living in a more digital world, customer's want the ability to text your store. By meeting your customers where they are, you can get quicker responses, and move orders in and out of your store at a quicker pace. As part of the two-way messenger widget, your store will be setup with a unique toll-free phone number that you and your customers can SMS text through. We plan to support the ability to use the same number as your store landline sometime in the future.

### To access the messenger widget

- Navigate to the home screen
- Click the bubble icon in the bottom-right corner to view messages.

As part of this widget, you will see a notification icon when you receive new messages. You can also attach files by clicking the attachment icon in the bottom left hand corner of a conversation. This will send a secure file link for your customer to view the image, pdf, or whatever type of file you are sending them.

## 5. Google Reviews

The first place most shoppers go when looking to buy anything is Google. This makes having a presence on Google a necessary component to anyone wanting to grow their business. One of the most effective ways to be recognized in your local search results is to have other shoppers that have positively reviewed your business through Google. By being able to send reviews to your customers through LifeSaver, you have a convenient way to grow your business.

The first step in having Google reviews sent from your account is to setup your business Google URL in Store configuration. Getting this Google URL can be done a few ways.

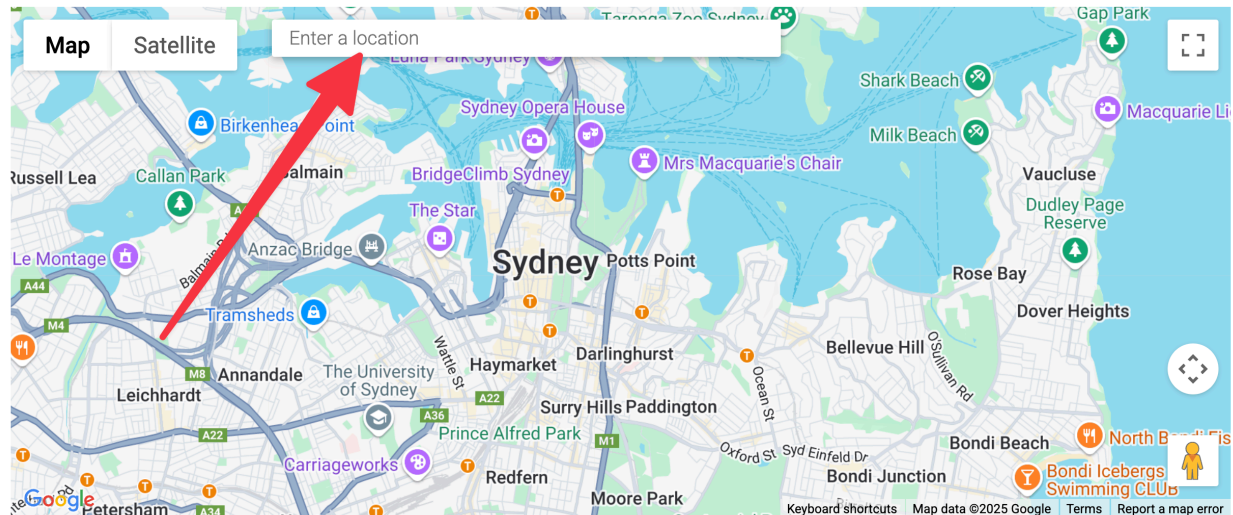
The 1st option is to log into your Google Business Profile, then click on "Customers" > "Reviews" > "Get more reviews." You'll find the review link displayed, which you can copy and paste into "Customer Review Link" in your LS store configuration.

If you do not have a Google Business Profile setup, you can follow these steps

- In a browser, go to <https://developers.google.com/maps/documentation/javascript/examples/places-placeid-finder>
- Once on that page, you will see a map that looks like the below image. Search for your business in the search field

The **Place ID Finder** sample allows a user to find a place based upon its address, then it adds a marker for the place to the map, and displays the place's place ID in an info window.

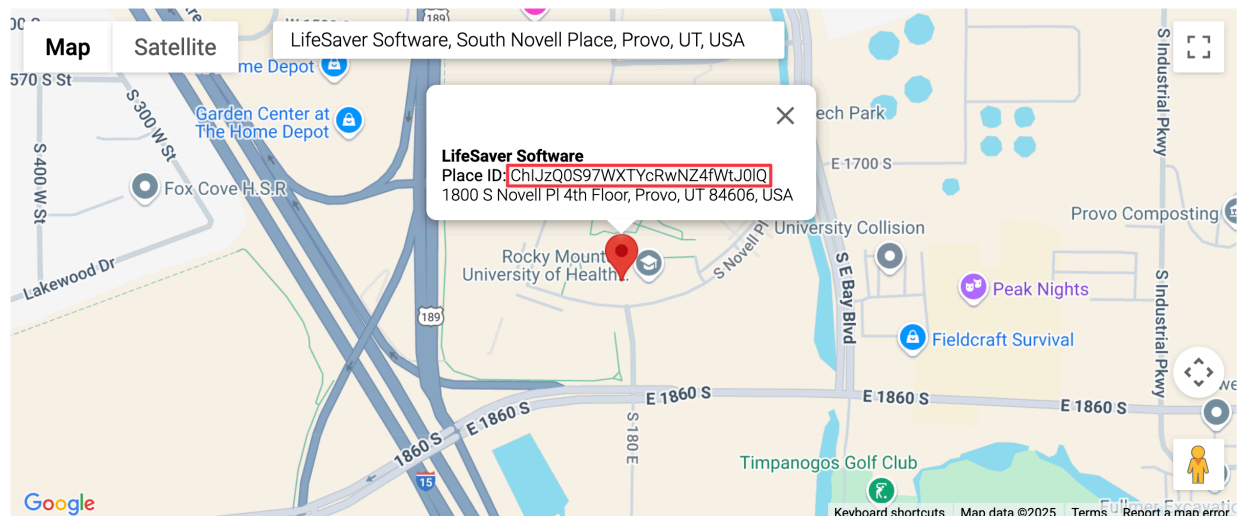
Read the [documentation](#).



Once you find and select your business, you will see something for your business called a “Place ID” (see image below). This is a unique ID from Google that is tied to your business.

The **Place ID Finder** sample allows a user to find a place based upon its address, then it adds a marker for the place to the map, and displays the place's place ID in an info window.

Read the [documentation](#).



Once you have the place id, copy that value and paste it at the end of the following URL <https://search.google.com/local/writereview?placeid=> . So your completed URL would look something like this

<https://search.google.com/local/writereview?placeid=ChIJzQ0S97WXTYcRwNZ4fWtJ0IQ>

The final step is to take this URL and paste it into LifeSaver Store Configuration. To know where to do that, follow the steps below.

- **Store Configuration Option**
  - From the home screen, go to store configuration
  - Click the “Store Information” tab
  - Fill out the Customer Review Link input field

The screenshot shows the 'Store Configuration' page with a dark blue header containing navigation links (Home, Help, Security, FullScreen) and user information (Hello EricThornton!, Log off). Below the header, the 'Store Configuration' title is followed by a series of tabs: Workshop, Taxes, Credit Card Processor, Settings, Store Information (selected), Printing, Production, Live Inventory Check, and Mat Cutter. The 'Store Information' tab contains several input fields: Store Name (Vegas Test Store), Email (ryandxavier@gmail.com), Street (1234 Main Street), Street Continued (empty), City (Knoxville), State (TN), Zip (30327), Country (UNITED STATES), Phone (8652502286), Fax (empty), External Store Number (134), and CustomerReviewLink (https://search.google.cc). The 'CustomerReviewLink' field is highlighted with a red rectangle. Below the input fields, there is an 'Email Template Editor' button and an 'Upload New Logo' section with a 'Choose File' button and a note: '\* Logo must be 260px wide and 100px tall.'

At this point, your Google Review link is now configured! To determine when this will be sent to the customer, go back to the same place where you configured work order status updates.

- **Production Section:**
  - From the main page, click **Production**.
  - On the Production Status page, select **Manage Status**.

- Click “Manage” for the status you want the review to be tied to.
- Check the box for sending a review link. Whenever a work order gets moved to that status, you will see a pop-up where you can choose to send that review or not.

**Manage Status: Ready For Pickup**

Rule Name  Mat  Required? ☐ Create

**Rules**

Name	Type	Required?

**Configure**

☐ Work Orders can move to previous status

☐ Work Orders in this status have been assembled

☐ Work Orders in this status have been delivered

☒ Send digital notification to customer when moved to this status

☒ Send review link to customer when moved to this status

Deactivate OK

## SMS Opt-in

For SMS within the United States, SMS providers have certain requirements. The LifeSaver team does most of the heavy lifting there, but merchants are required to make sure that their customers are opted into receiving messages. Below is a form you should have your customers sign before sending them text messages. If you would like to learn more about why opt-in is required, you can learn more here <https://www.bandwidth.com/blog/sms-marketing-opt-in-requirements-logistics/>

### **Consent to Receive SMS Messages**

By signing below, you agree to receive promotional, transactional, and customer service-related text messages at the phone number provided above.

- Message frequency may vary.
- Message & data rates may apply.
- Reply **STOP** to opt-out at any time.
- Reply **HELP** for assistance.
- Your information will not be shared with third parties.

### **Customer Agreement**

☐ I consent to receiving marketing text messages. Message frequency may vary and standard data rates may apply.

☐ I consent to receiving account notification and order update text messages. Message frequency may vary and standard data rates may apply.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_