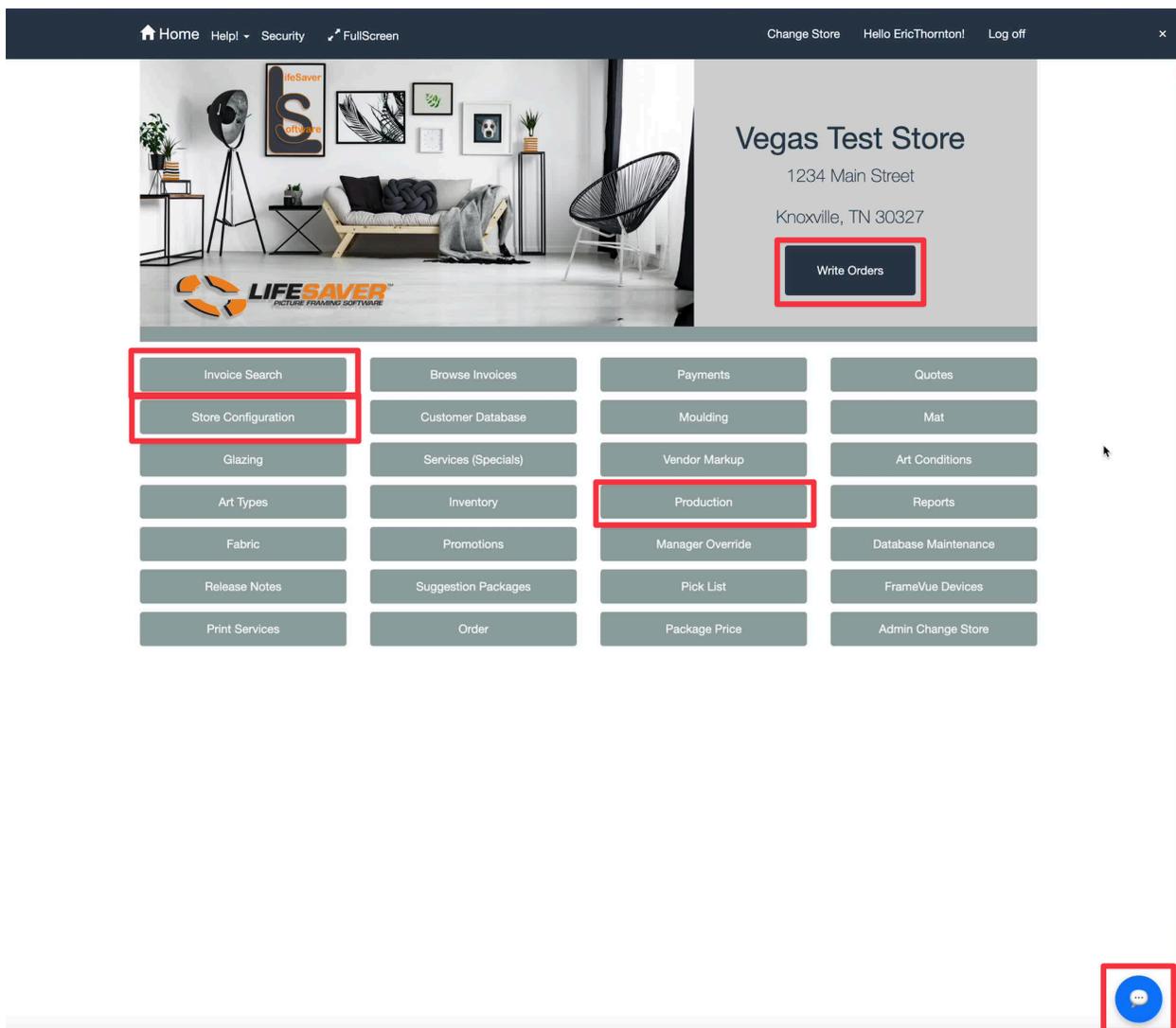


# A Guide to Using the LifeSaver Messaging Assistant Tools

## 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)

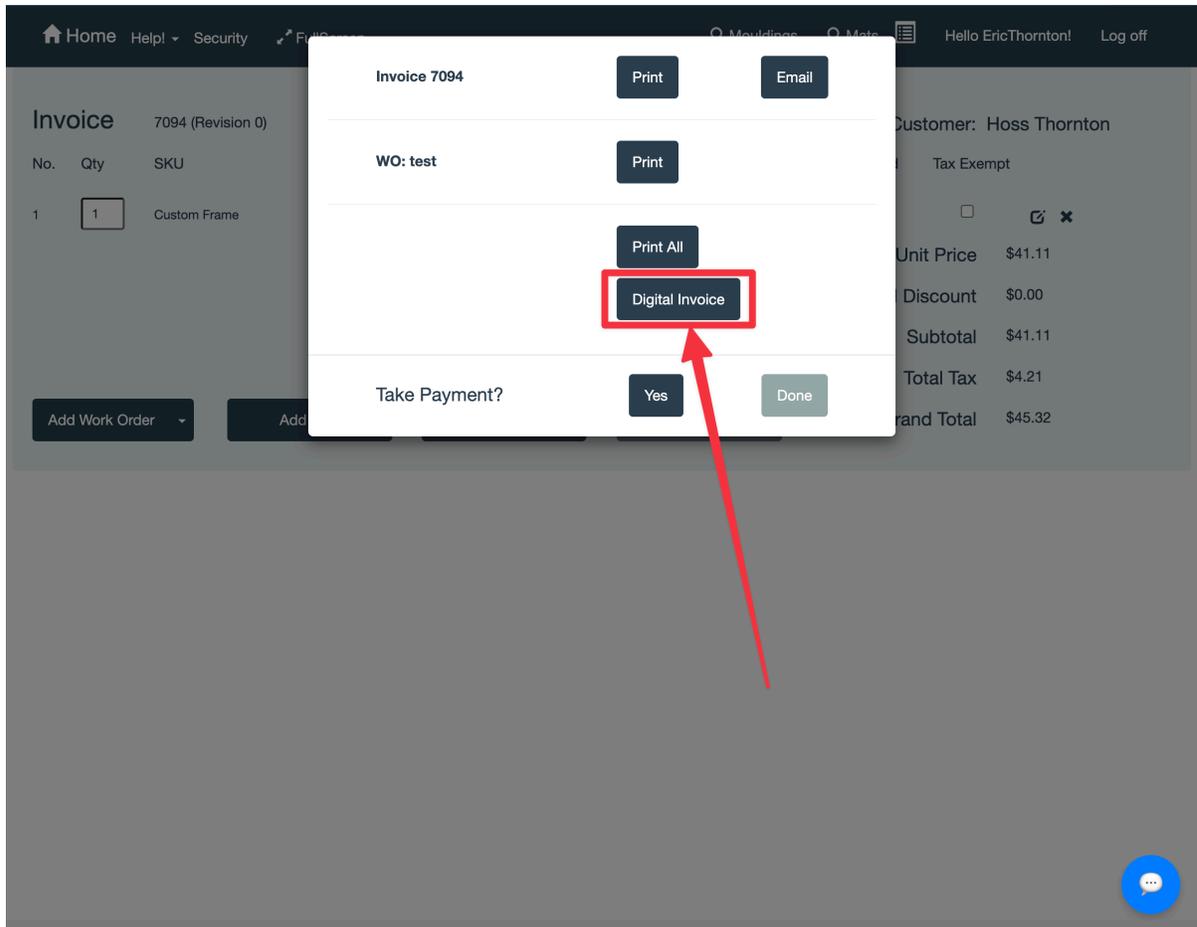
### Invoice Search

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	Valiani 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 - InProgress	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 #  Description Start Date End Date PO #

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 -	Valiani 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 - InProgress	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
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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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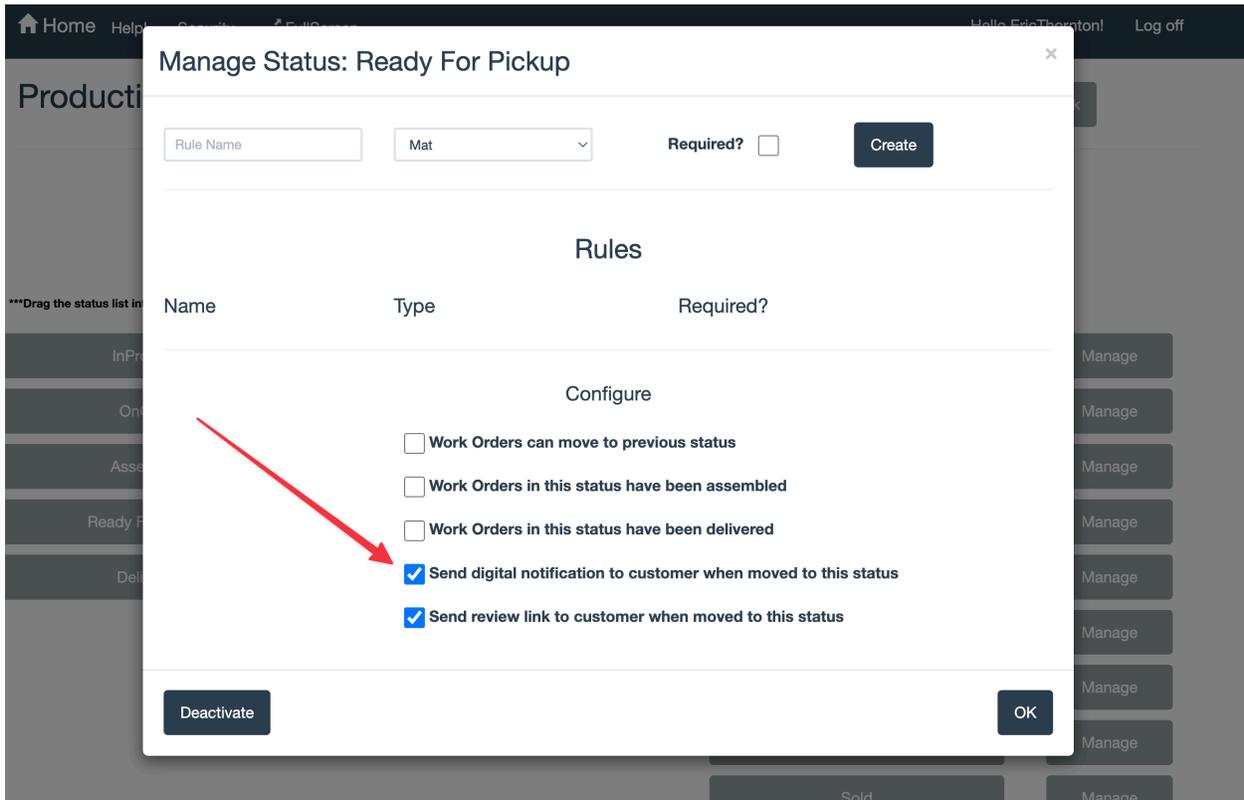
### 3. Production Status Notifications

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.



## 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**

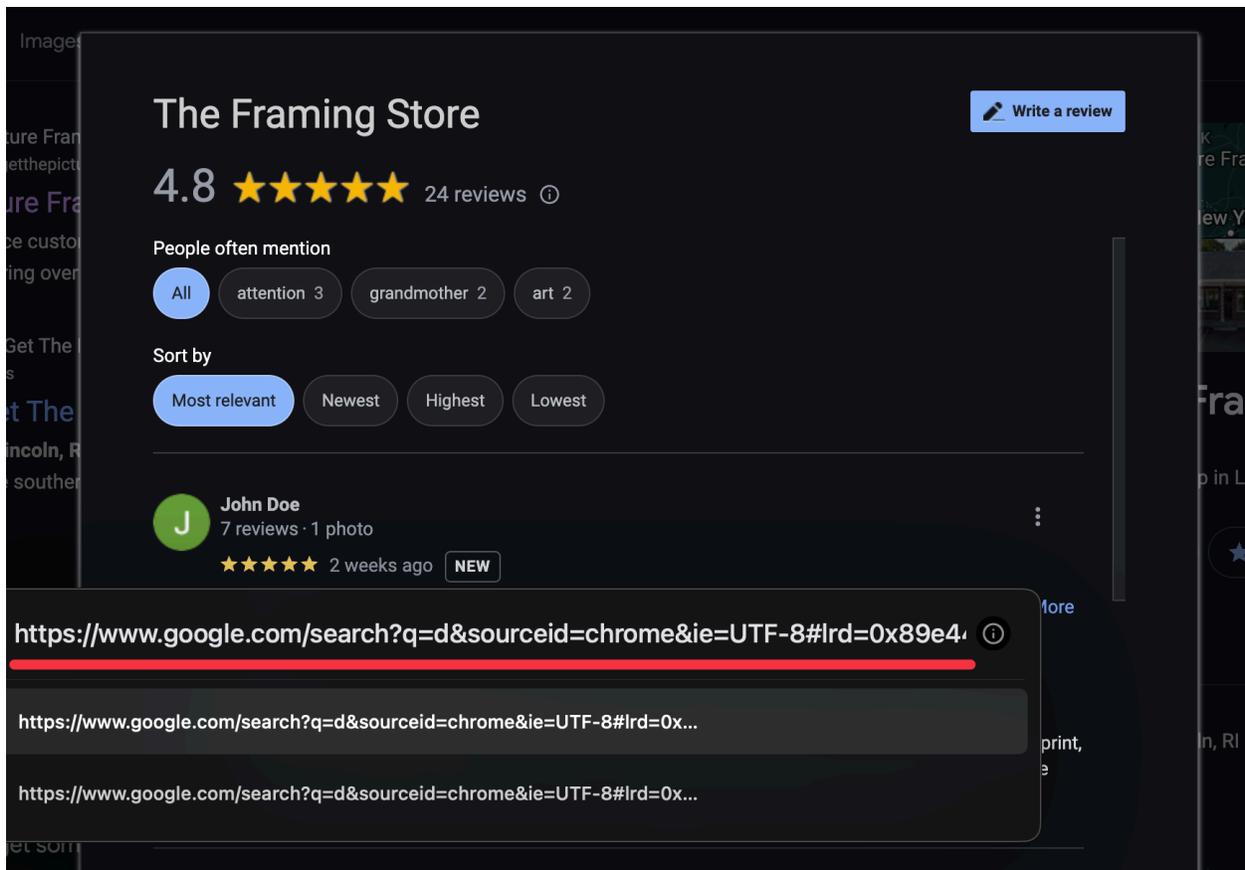
The first place most shoppers go when looking to buy anything is Google. This makes having a presence on Google a necessary component to anyone wanting to grow their business. One of the most effective ways to be recognized in your local search results is to have other shoppers that have positively reviewed 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. This can be done by

- Googling your business
- Clicking the link to see existing reviews for your store

The screenshot shows a Google Business Profile for 'The Framing Store'. At the top, there are two photo thumbnails: one showing the interior with various colored frames and a 'See photos' label, and another showing the exterior storefront with a 'See outside' label. Below the photos is the business name 'The Framing Store' in large white text. Underneath the name is a rating of 4.8 stars (represented by five yellow stars) and '24 Google reviews'. A red arrow points from the right towards the '24 Google reviews' text. To the right of the reviews is a vertical ellipsis menu icon. Below the name and rating is the business category 'Small business · Picture frame shop in Mayberry'. A row of five action buttons follows: 'Website', 'Directions', 'Reviews', 'Save', and 'Share'. Below these buttons are two more buttons: 'Share' and 'Call'. At the bottom of the profile, the address '123 Cherry Street, Mayberry' is listed, followed by the hours 'Hours: Open · Closes 6 PM' with a dropdown arrow, and the phone number 'Phone: (123) 123-1234'. At the very bottom, there are links for 'Suggest an edit' and 'Own this business?'.

- Once that modal opens up, copy the current URL link from your browser. This is the link you will need in the system to start collecting reviews.



Now that you have the link, you will need to save it in the following location in LifeSaver

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

## Store Configuration

Workshop Taxes Credit Card Processor Settings Store Information Printing Production Live Inventory Check Mat Cutter

<b>Store Name</b>	<input type="text" value="Vegas Test Store"/>	<b>Email</b>	<input type="text" value="ryandxavier@gmail.com"/>
<b>Street</b>	<input type="text" value="1234 Main Street"/>	<b>Street Continued</b>	<input type="text"/>
<b>City</b>	<input type="text" value="Knoxville"/>	<b>State</b>	<input type="text" value="TN"/>
<b>Zip</b>	<input type="text" value="30327"/>	<b>Country</b>	<input type="text" value="UNITED STATES"/>
<b>Phone</b>	<input type="text" value="8652502286"/>	<b>Fax</b>	<input type="text"/>
<b>External Store Number</b>	<input type="text" value="134"/>	<b>CustomerReviewLink</b>	<input type="text" value="https://search.google.cc"/>

[Email Template Editor](#)

Upload New Logo

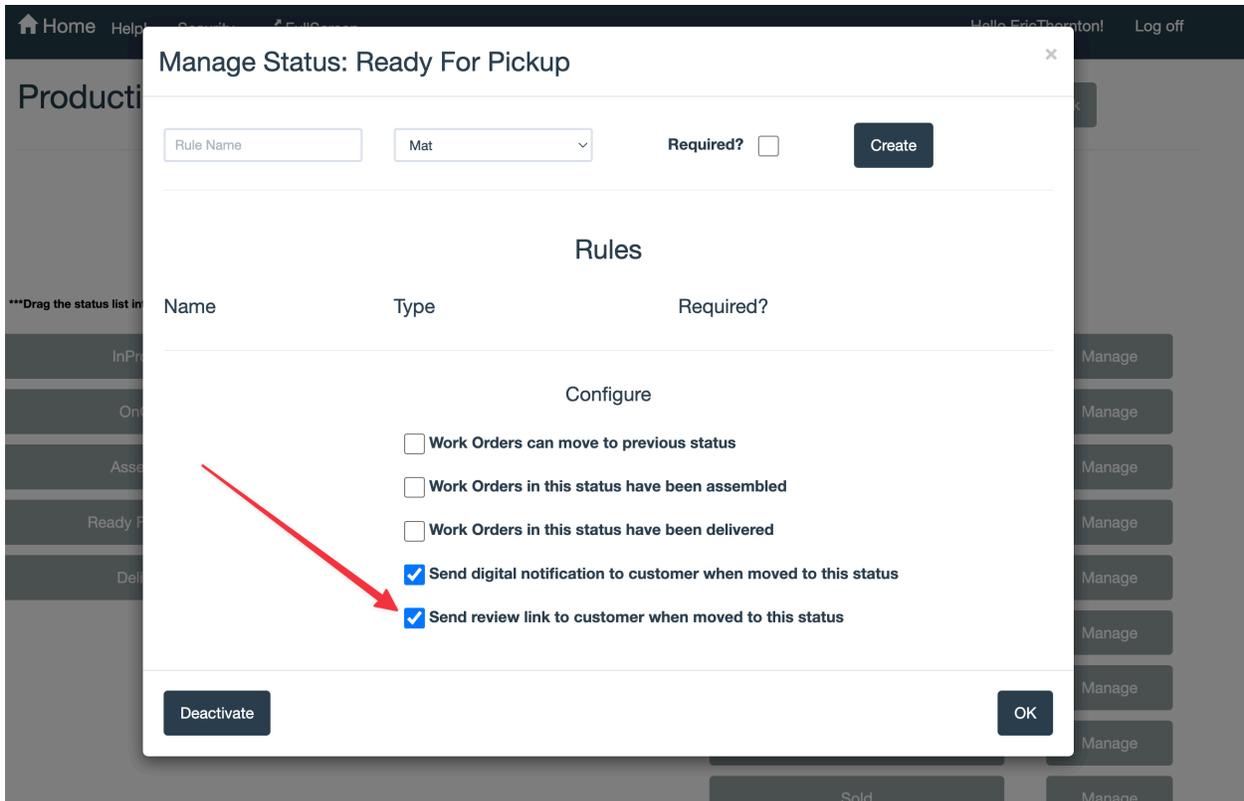
No file chosen

\* 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.



## 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:** \_\_\_\_\_