OnceHub Support

How to test a Custom notification template

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You can test your Custom templates by creating a test booking and filling out a Booking form as if you were a Customer. You can perform several of these test bookings to test every template you have created in every relevant scenario.

In this article, you'll learn how to test a Custom notification template.



Testing the Custom notification template

1. In the Booking form section of your Event type, use from the **Booking form** drop-down menu to select a Booking form (Figure 1).

| < 👩 Event typ | e: 15-minute meeting Event type 15-minute meeting | V |
|--|--|---|
| Overview | Booking form and redirect | ? |
| Scheduling options | 1 Booking form | ? |
| Time slot settings | Booking form Default | |
| Booking form and redirect | Your name* Drevie | |
| Customer notifications | Your email* Booking notifications will be sent to this email | |
| Payment and cancel/reschedule policy | Confirm your email* Confirm your email | |
| Public content | Your company | |

Figure 1: Selecting a Booking form template

2. In the Customer notification section of your Event type, select a template for each Notification scenario you want to send notifications for (Figure 2).

| < 🚯 Event typ | e: 15-minute meeting … | | Ev | ent type | 15-minute meeting | ¥ | |
|--|--|----------|---------|----------|-------------------|---|--|
| Overview | Customer notifications | | | | | ? | |
| Scheduling options | The account has 996 SMS credits. Buy more credits | | | | | | |
| Time slot settings | Notification scenario | Email | SMS (i) | Templ | ate | | |
| Booking form and redirect | ✓ Automatic booking | | | | | | |
| Customer > | Booking made by Customer Sent to the Customer when the Customer makes | √ | | Sales | template | - | |
| Payment and cancel/reschedule policy Public content | a booking. | | | | | | |
| | > Booking with approval | | | | | | |
| | > Calendar event | | | | | | |
| | > Reminders and follow-ups | | | | | | |

Figure 2: Choosing a Custom notification template for each Notification scenario

3. In the User notifications section of your Booking page, select a template for each Notification scenario you want to send notifications for (Figure 3).

| < 🔞 Booking pa | age: Sales call … | | | Booking page | Sales call | | | |
|-------------------------------|---|---------------|-------------------------------|--------------|------------|--|--|--|
| Overview | User notifications | | | | ? | | | |
| Event types | The account has 996 SMS credits. Buy more credits | | | | | | | |
| Associated calendars | | Booking owner | All users with | Editor | | | | |
| Recurring availability | | Dooking owner | privileges w added to this | | | | | |
| Date-specific availability | Notification scenario | Email SN | | | | | | |
| | V Automatic booking | | | | | | | |
| Location settings | Booking made by Customer | v | | | | | | |
| User notifications | Sales template 🔹 | | | | | | | |
| Salesforce settings | > Booking with approval | | | | | | | |
| | > Calendar event | | | | | | | |
| Public content | > Reminders and follow-ups | | | | | | | |

Figure 3: Choosing a Custom notification template for each Notification scenario

(i) Note:

If you want to receive User SMS notifications, you'll need to enter a phone number in your Profile's Personal details section.

4. In the Booking page Overview section of your Booking page, click on the public link in the **Share & Publish** section.

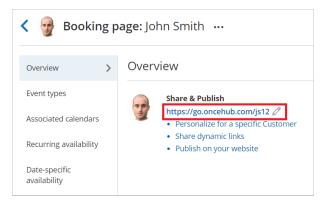


Figure 4: Booking page public link

- 5. Schedule a meeting and fill out the Booking form that you created as if you were a Customer.
- 6. Click Done.
- You can now check that you received a confirmation email and SMS.
 If you're using Booking with approval mode, you can click **Approve the booking request** in your User email notification. Learn more about scheduling booking requests
 You can also check that the calendar event was added to your calendar. Learn more about calendar events
- 8. Finally, you can choose to cancel or reschedule the booking, or let the booking run its course and test the reminder and follow-up messages.

Testing checklist

During the testing, you should check the following:

- The text is written the way you want.
- The correct Dynamic fields were chosen.
- The spacing/formatting is correct.
- That you are sending emails and SMS notifications for the required booking notifications.