The Customer notifications tab

Last Modified on Aug 27, 2024

The customer notifications tab allows you to apply custom notification workflows to the booking calendars in your account. You can either use a standard (pre-set) workflow, or customize a new workflow. Read on to learn how to apply an existing workflow and how to create custom workflows from scratch.

These notification workflows also apply when a booking calendar is used as a scheduling action within a chatbot or routing form. When a meeting is scheduled using a booking calendar within a chatbot or routing form, the SMS or email notifications sent to the customer will be determined by the notification workflow that has been applied to the booking calendar.

Applying notification workflows to a booking calendar

Member users can apply existing workflows to their booking calendars if they have created the booking calendar and are the sole host. If they have been added to a booking calendar by an administrator, then they are not able to add a workflow to that booking calendar.

Administrators have no restrictions to applying workflows to booking calendars. Custom workflows can be created by administrators, which is explained here.

A workflow needs to be applied to a booking calendar in order for it to come into effect.

1. To begin, open the booking calendar you want to apply a notification workflow to.
2. At the top of the booking calendar builder, click on the **Customer notifications** tab.
3. From the drop-down menu, select the customer notification workflow that you want to apply to this booking calendar.
    - You will be able to see the settings of the selected workflow displayed below.
4. When you've selected the workflow you want, click **Save** at the bottom.

That's it! Now any customer that has scheduled a meeting through that booking calendar will receive a series of notifications according to the workflow that you have set.

Create a custom workflow

Administrators can create custom workflows by configuring notifications for the entire booking cycle. Member users cannot create or edit workflows under any circumstances.

> **Note:**
>
> Alternately, you can select the three dots next to the title of any existing workflow, which will allow you to duplicate the existing workflow. You can then edit the settings of the duplicated workflow.

Email, SMS notifications, and reminders can be triggered to be sent at these points:

- Meeting confirmed
- Meeting reminder

- Meeting rescheduled
- Meeting reassigned
- Meeting canceled

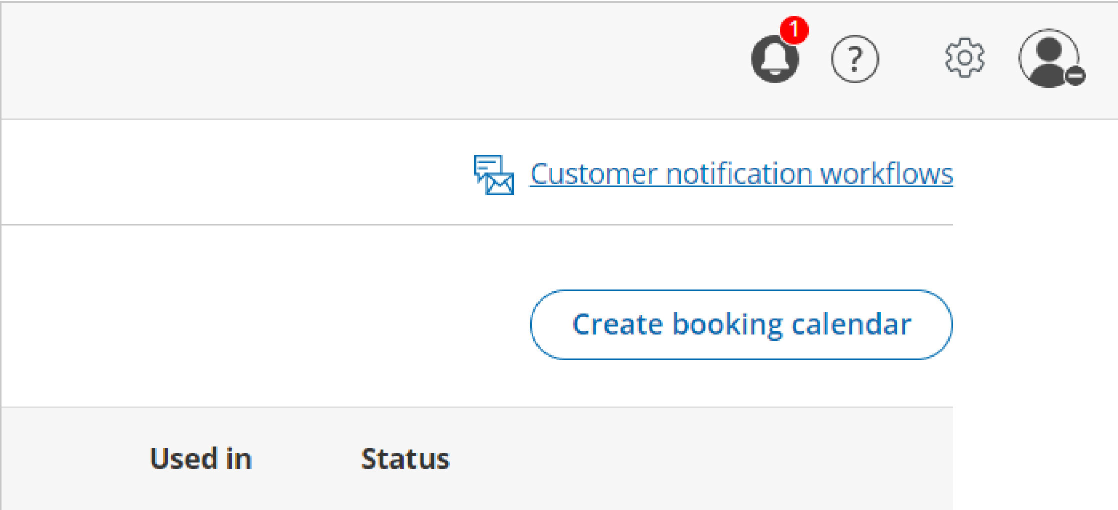

*Figure 1: The **Customer notification workflows** button*

Steps for creating a custom workflow

1. Go to the booking calendar builder.
2. Click the **Customer notification workflows** button (Figure 1).
3. Click **+ New custom workflow** (Figure 2).
4. Name the workflow in the pop-up and click **Create**
5. In each row, select whether to send an email, an SMS, or both at each point.
    - You can customize the notification emails. Read on below for a guide.
    - When you select **SMS notification**, a corresponding **SMS notification** interaction will be added to the booking calendar's booking form, directing customers to enter their phone number.
6. In the second row, **Meeting reminder**, you can choose how long before a meeting the reminder is sent. You can also add up to two additional reminders.
7. Once you're happy with the workflow, click **Save** at the bottom of the screen.

This new notification workflow can be applied to any of the booking calendars in your account.

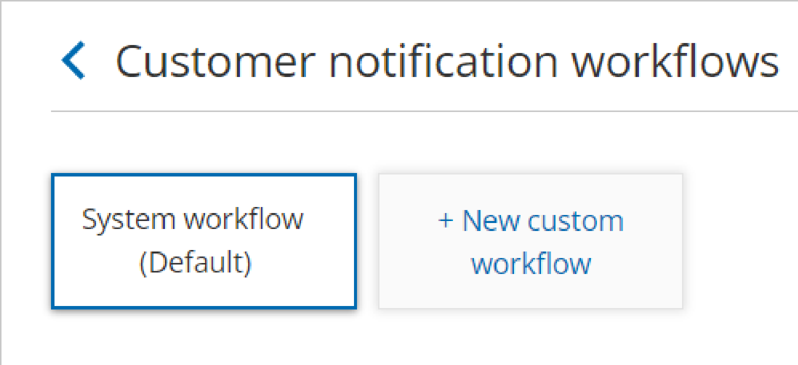

Figure 2: Choosing between a default or custom workflow

Customizing the notification emails

When a customer books a meeting through a booking calendar, with a notification workflow applied, you can customize the email that is sent out to them when the meeting is confirmed, rescheduled, canceled, reassigned, as well as custom reminders.

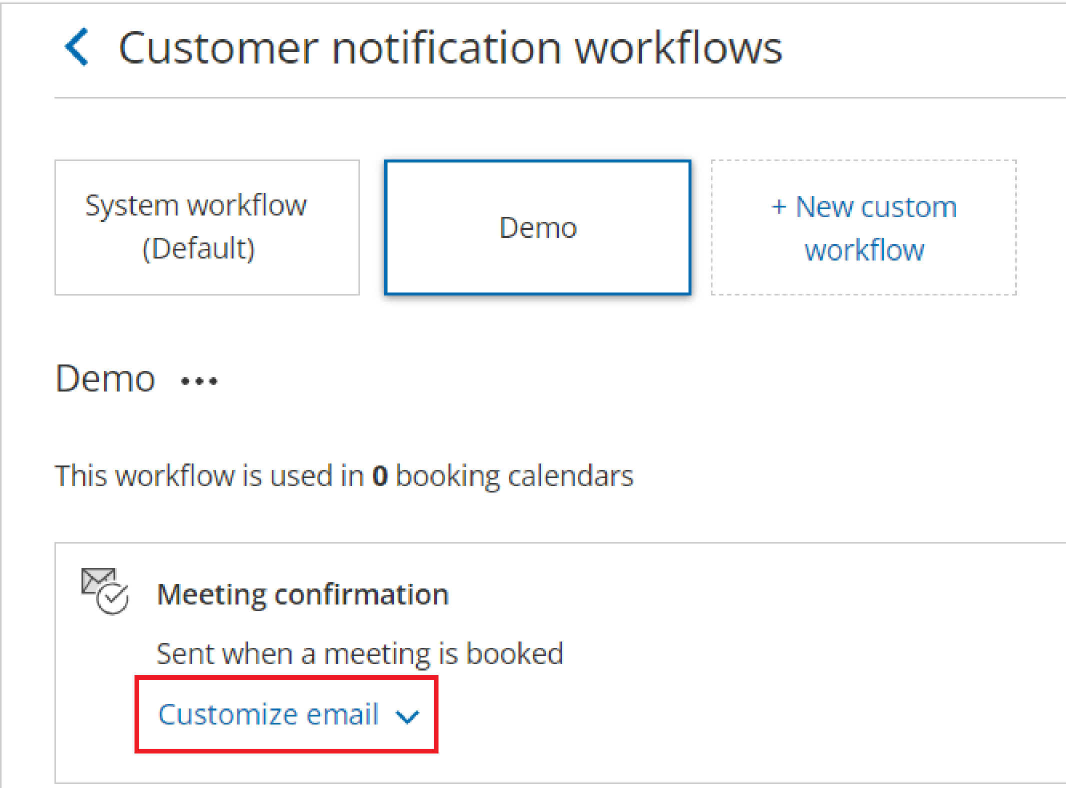

Figure 3: Customizing the meeting confirmation email

Steps for customizing email notifications

1. In a notification workflow, click **Customize email** (Figure 3) below the title of the notification trigger.
2. Here, you can customize any of the text in the subject line and body of the email.

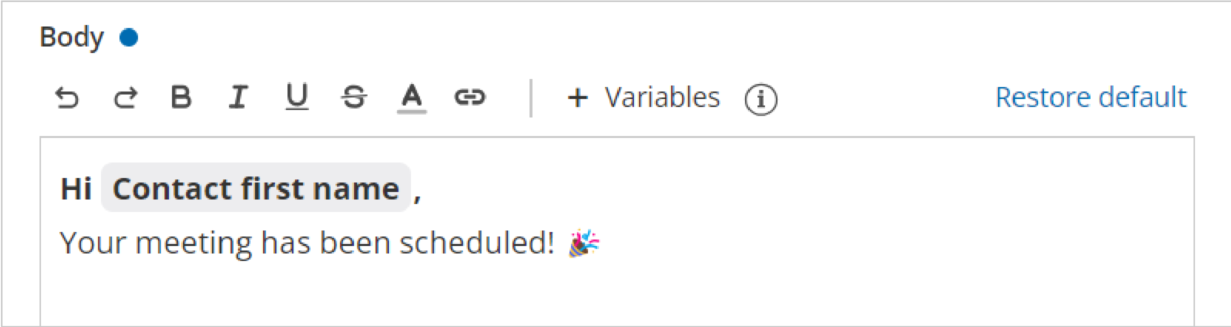

Figure 4: The text toolbar

- You can add variables, which are dynamic fields, by beginning a word or phrase with the **@** symbol. These fields are supplied by the details of the scheduled booking. To see the full list of variables, click **+Variables** and scroll through the list. See here for a glossary of each variable.
- At any time, you can restore the original email by clicking **Restore default** in the toolbar.

3. To save your changes, click **Save** at the bottom of the screen.

Variables glossary

Below is a full list of the variables available when customizing an email. Variables are dynamic fields that add meeting-specific data into the email body: they will be replaced in the email by the corresponding data. If the variable is present in the email template, but there is no data to fill the field, then it will be blank.

Contact data

With these variables, which populate the email with the contact's information, every email notification the customer receives will be personalized.

Meeting data

These variables populate the email with information concerning the meeting. They help you make the notification emails informative and useful: you can add these fields to provide the customer with a link allowing them to reschedule the meeting, or a link directly to the video conferencing app where the meeting will be held.

1. Additional attendees: Any other users attending the meeting from the host side.
2. Additional guests: Any other guests added to the meeting by the customer.
3. Booking form transcript: A transcript of the customer's answers and selections in the booking form.
4. Booking ID: The unique identifier generated when the booking was made.
5. Cancel link: A link to cancel the meeting.
6. Meeting date: The date the meeting is scheduled to occur on, in the customer's time zone.
7. Meeting location: The location selected by the user, based on the options you provide. If the customer selects:

   - Video conferencing (Google Meet, Zoom, Microsoft Teams, GoToMeeting, Webex) This field will populate with a message inviting the customer to use a URL link to the meeting. The message varies depending on the conferencing app,
   - Physical location: This field will populate as the address for the meeting.
   - Phone call: This field will populate with the customer's phone number.

8. Meeting time: The time of the scheduled meeting in the customer's time zone.
9. Reschedule link: A link to reschedule the meeting.
10. Reschedule reason*: This will populate with the reason given when the meeting was rescheduled. Note that this variable is only available in the **Meeting rescheduled** email.
11. Cancellation reason*: This will populate with the reason given when the meeting was cancelled. Note that this variable is only available in the **Meeting cancelled** email.