

How to create a Custom email or SMS template [Legacy]

You can use the Notification templates editor to customize the email and [SMS notifications](#) that are sent to Customers and Users.

In this article, you'll learn how to create Custom templates for email and [SMS notifications](#).

Accessing the Notification templates editor

Custom templates are created in the [Notification templates editor](#). To access the editor, go to **Booking pages** in the bar on the left. Select the **Notification templates editor** on the left.

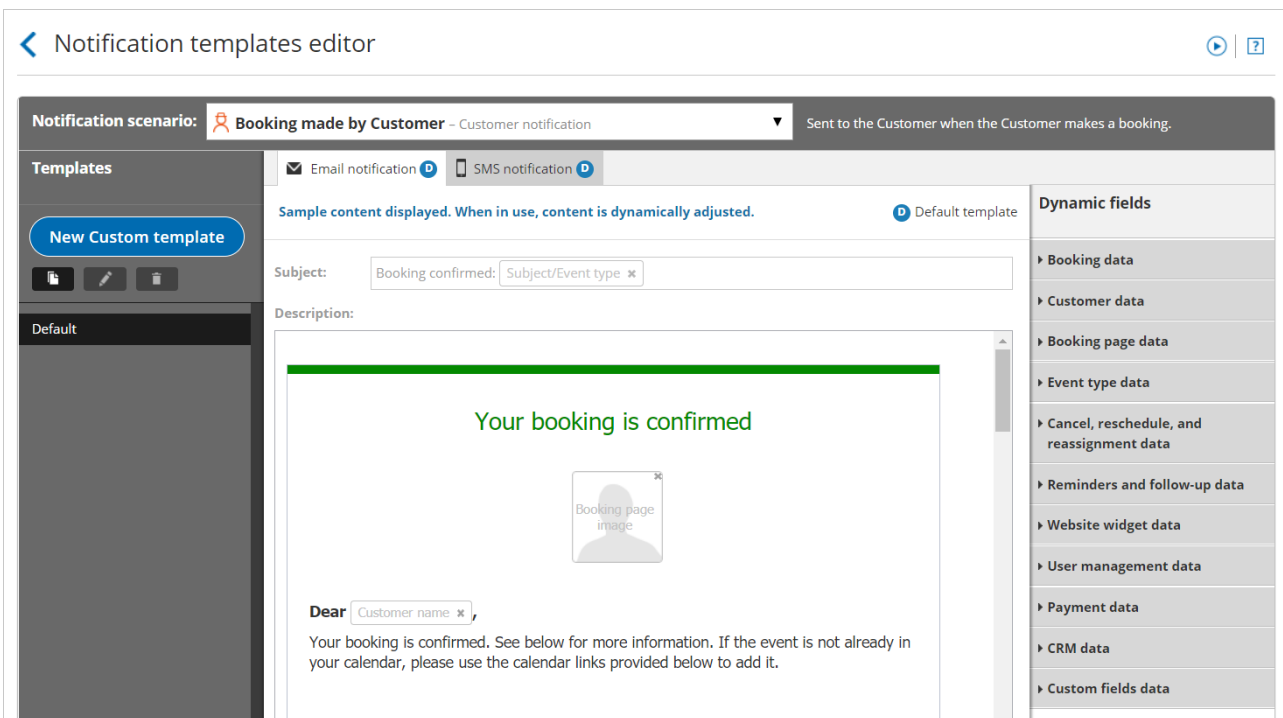


Figure 1: Notification templates editor

Creating a notification template

There are three ways to create a customized notification template. You can create a new template based on the Default template, copy an existing template you previously created, or create a blank template.

Creating a new template based on the Default template

If you like the Default template and want to make small changes to it, you can create a template based on the Default template and then customize it according to your needs.

1. Select the **Notification scenario** that you want to work on from the drop-down menu (Figure 2). [Learn more about Notification scenarios](#)

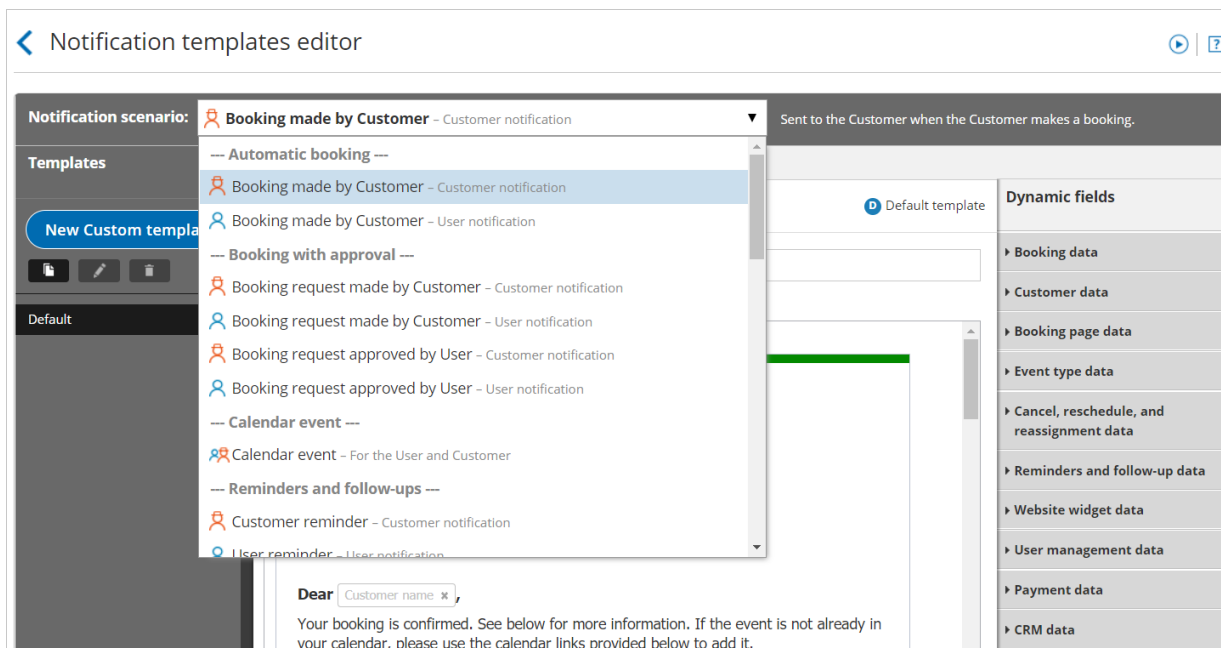


Figure 2: Notification scenarios drop-down menu

2. Click the **New Custom template** button in the left pane (Figure 3).

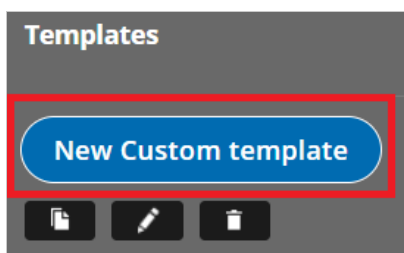
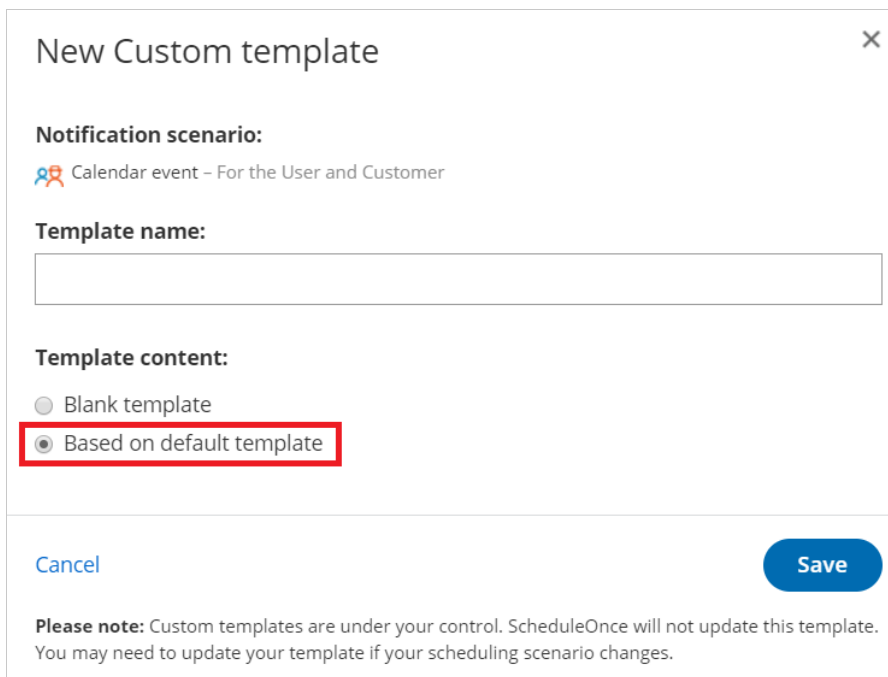


Figure 3: Click the New Custom template button

3. In the **New Custom template** pop-up, enter a name for your template. This name can be changed later if required.
4. In the **Template content** section, select **Based on default template** (Figure 4).



The image shows a 'New Custom template' pop-up window. At the top, it says 'New Custom template' with a close button (X). Below that, it asks for a 'Notification scenario' and shows 'Calendar event - For the User and Customer' with a person icon. There is a 'Template name' field which is currently empty. Under 'Template content', there are two radio button options: 'Blank template' and 'Based on default template'. The 'Based on default template' option is selected and highlighted with a red box. At the bottom, there are 'Cancel' and 'Save' buttons. A 'Please note' section at the very bottom states: 'Custom templates are under your control. ScheduleOnce will not update this template. You may need to update your template if your scheduling scenario changes.'

Figure 4: New Custom template pop-up

5. Click **Save**.

Copying an existing template

If you like a template that you've already created in the Notification templates editor, you can copy it and make changes to it, or use it for a different Notification scenario.

1. Select the template you want to copy from the **Templates** list.
2. Click the **Copy** icon (Figure 5).

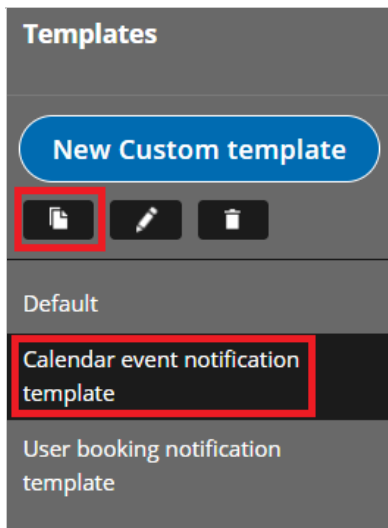


Figure 5: Copy an existing template

3. In the **Copy template** pop-up, use the drop-down menu to select the **Notification scenario** you want to use the template for.

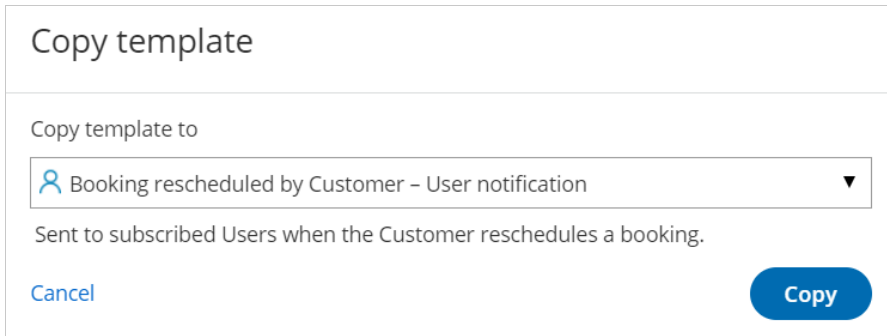


Figure 3: Copy template pop-up

4. Click **Copy**.

Creating a Blank template

If you want to create a fully customized notification template, you can create a Blank template.

1. In the **Notification scenario** drop-down menu, select the Notification scenario you want to work on. [Learn more about Notification scenarios](#)
2. Click the **New Custom template** button.
3. In the **New Custom template** pop-up, enter a name for your template (It can be changed later).
4. In the **Template content** section, select **Blank template**.

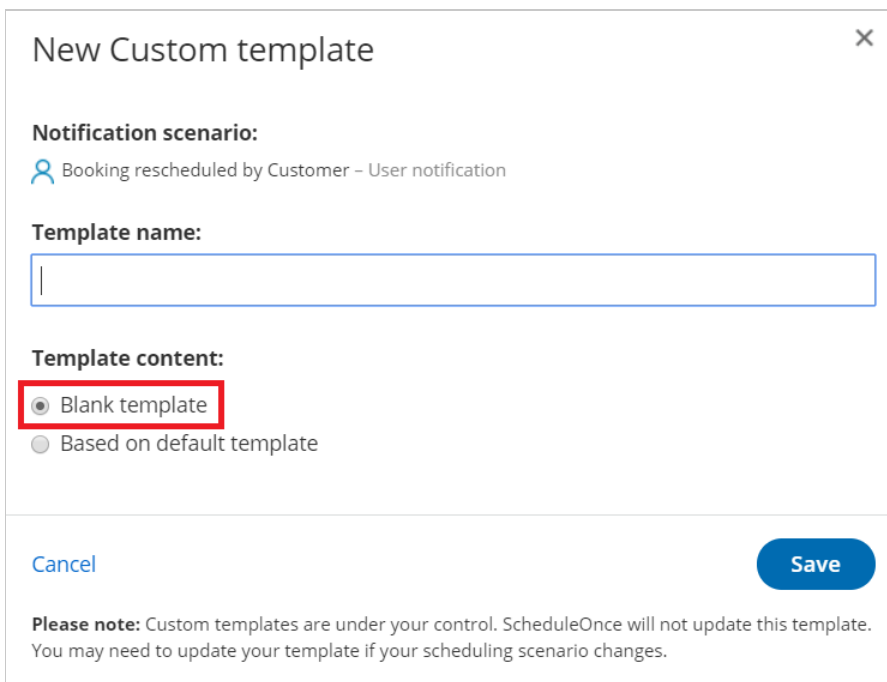


Figure 4: New Custom template pop-up

5. Click **Save**.

Editing Custom templates

The Notification templates editor has two modes: WYSIWYG (What You See Is What You Get) and HTML. The WYSIWYG mode allows you to edit template content while viewing the content in the format it will appear. The HTML mode allows you to edit the HTML code directly.

[Learn more about the WYSIWG editor](#)

Dynamic fields

You can add Dynamic fields to your Notification templates to dynamically add variable data to your emails and SMS notifications. This allows you to personalize templates for different scenarios for Users or for Customers. For example, emails and SMS can include the Customer's name and the meeting time and price if you are charging for an Event type.

[Learn more about Dynamic fields](#)

Adding a Dynamic field

1. Place the cursor in the template editor text box where you want to insert the Dynamic field (Figure 5).

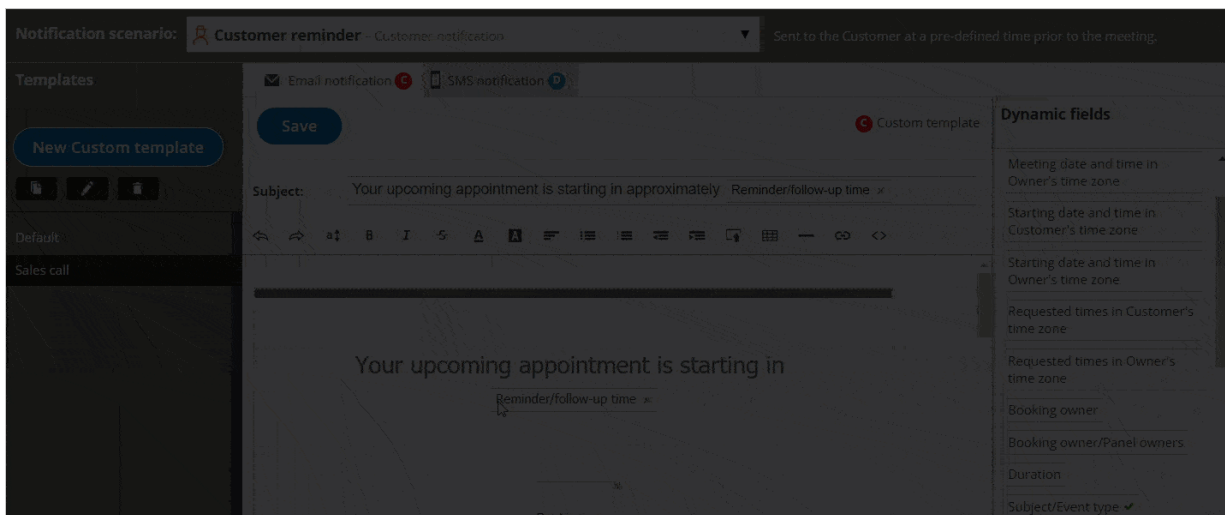


Figure 5: Place the cursor in the template editor text box

2. In the **Dynamic Fields** column on the right, click the Dynamic field you want to add (Figure 6).

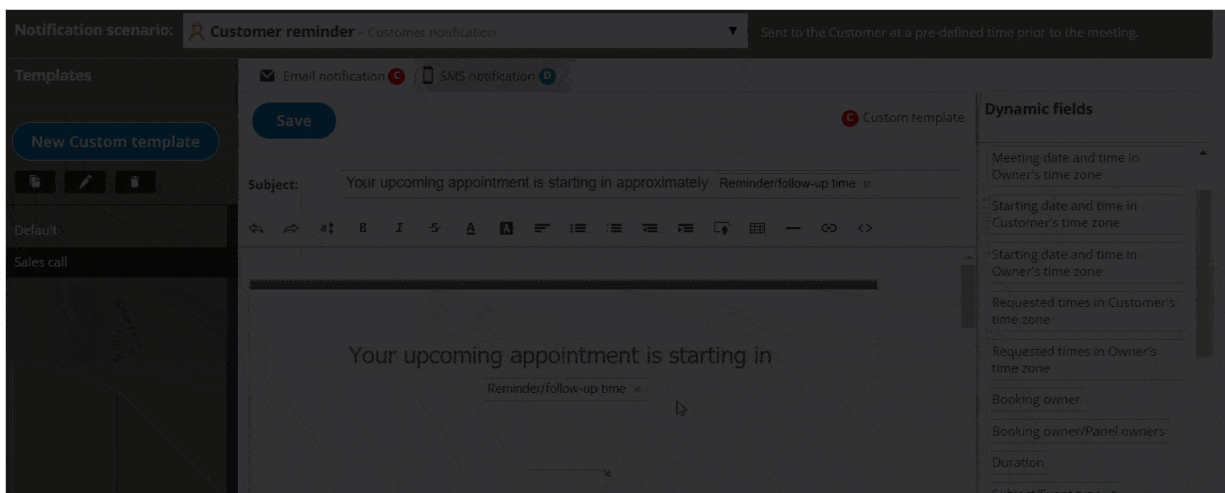


Figure 6: Add a Dynamic field

3. The chosen Dynamic field will appear in the selected location in the template.

To remove a Dynamic field, click on the **X** next to the Dynamic field you want to remove.

Note::

When you use Dynamic fields, you need to be sure that the data exists in your account.

For example, **Event type price** is one of the Dynamic fields available to you. However, if you do not enter an Event type price in the [Payment/cancel and reschedule policy section](#), no data will be displayed for this field in your emails and SMS notifications. [Learn more about Dynamic fields](#)

Where are notification templates used?

Notification templates are used in specific Notification scenarios. You can select which Notification template is used in each scenario from the **Template** drop-down menu in the [Customer notifications section](#) and [User notifications section](#) of your Booking pages and Event types.

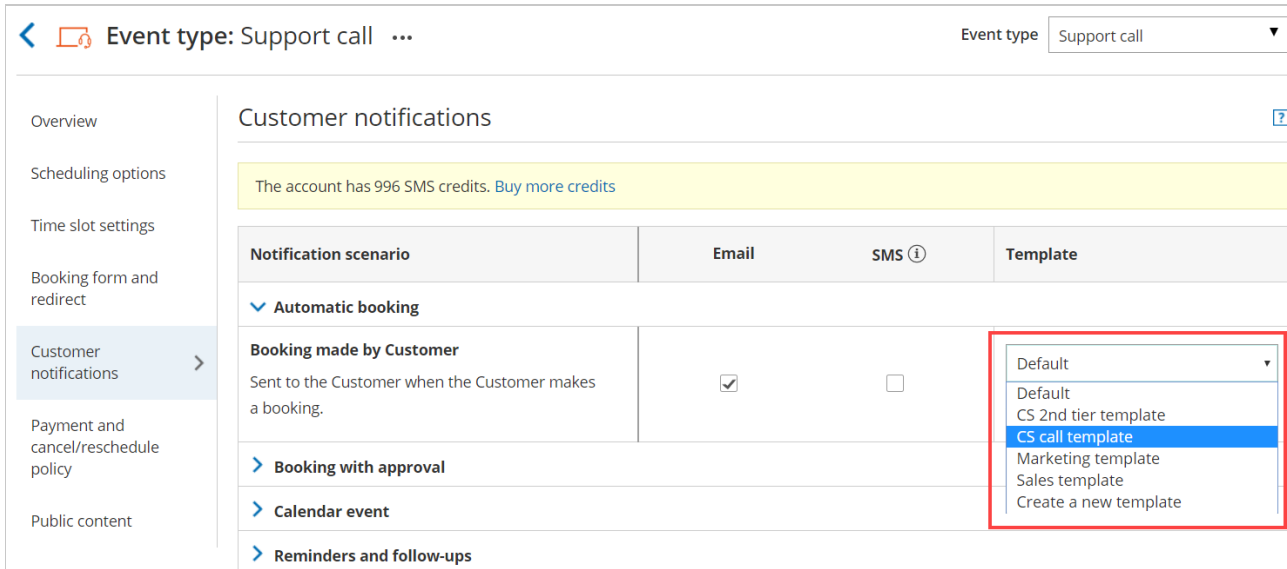


Figure 6: Template drop-down menu

Customer notifications templates

Customer notification templates are used in the [Customer notifications section](#). To choose which notifications Customers receive, go to **Booking pages** in the bar on the left → relevant Event type → **Customer notifications**.

Note:

If your [Booking page is associated with an Event type](#), the Customer notifications section will be on the Event type.

When [Customer notifications based on custom templates](#) are sent, dynamic fields such as time zone, country, and location are shown in the locale (language) [selected on the Booking page](#).

User notifications templates

User notification templates are used in the [User notifications section](#). To edit which notifications Users receive, go to **Booking pages** in the bar on the left → relevant Booking page → **User notifications** (Figure 7).

Booking page: Support call ... Booking page Support call

Overview

Event types

Associated calendars

Recurring availability

Date-specific availability

Location settings

User notifications

Salesforce settings

Public content

User notifications

The account has 996 SMS credits. [Buy more credits](#)

Notification scenario	Booking owner		Dana Fisher		All users with Editor privileges will be added to this table. Grant a user Editor privileges
	Email	SMS	Email	SMS	
Automatic booking Booking made by Customer ⓘ Default	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Booking with approval					
Calendar event					
Reminders and follow-ups					

Figure 7: User notifications section

Calendar event template

You can access the [Calendar event](#) template in the User notifications section. To edit which template is used for the Calendar event, go to → relevant Booking page → **User notifications**.

New User sign-up template

[New user sign-up](#) templates is used in the [Add a new User](#) page. To edit which New User sign-up template is used, go to the **Account gear menu** → **Users** → **New user button**.