## 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.

Notification templa	tes editor		• ?		
Notification scenario: 🙎 Boo	king made by Customer – Customer notification	Sent to the Customer when the Cust	omer makes a booking.		
Templates	🗠 Email notification 🕑 🚦 SMS notification 🕑				
	Sample content displayed. When in use, content is dynamically adjusted.	Default template	Dynamic fields		
	Subject:         Booking confirmed:         Subject/Event type *				
	Description:		▶ Customer data		
Default			▶ Booking page data		
			▶ Event type data		
	Your booking is confirmed		<ul> <li>Cancel, reschedule, and reassignment data</li> </ul>		
	34		▶ Reminders and follow-up data		
	Booking page image		▶ Website widget data		
		▶ User management data			
	Dear Customer name *,		▶ Payment data		
	Your booking is confirmed. See below for more information. If the event is your calendar, please use the calendar links provided below to add it.	s not already in	▶ CRM data		
			▶ Custom fields data		

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

#### Kotification templates editor • ? Notification scenario: Sent to the Customer when the Customer makes a booking Booking made by Customer - Customer notification ▼ --- Automatic booking ---Templates Research Customer - Customer notification Dynamic fields Default template 8 Booking made by Customer - User notification New Custom templa --- Booking with approval ---Booking data 📔 📝 📋 Booking request made by Customer - Customer notification • Customer data Default A Booking request made by Customer – User notification Booking page data Research State Approved by User - Customer notification • Event type data R Booking request approved by User - User notification Cancel, reschedule, and --- Calendar event --reassignment data R Calendar event – For the User and Customer Reminders and follow-up data ---- Reminders and follow-ups ----• Website widget data R Customer reminder – Customer notification ▶ User management data reminder - Use Payment data Dear Customer name \*, Your booking is confirmed. See below for more information. If the event is not already in ▶ CRM data your calendar, please use the calendar links provided below to add it.

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).

New Custom template	×
Notification scenario:	
Template name:	
Template content:	
Blank template	
<ul> <li>Based on default template</li> </ul>	
Cancel	
<b>Please note:</b> Custom templates are under your control. ScheduleOnce will not update this templa You may need to update your template if your scheduling scenario changes.	ite.

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.

Copy template	
Copy template to	
R Booking rescheduled by Customer – User notification	▼
Sent to subscribed Users when the Customer reschedules a booking.	
Cancel	Сору
	Сору

*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**.



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).

Notification scenario: R Customer reminder - Customer optification	$\sim$ $\mathbf{V}_{\rm e}^{\rm T}$ Sent to the Customer at a pre-defined time prior to the meeting.
Templates 🖾 Email notification 🕒 🚺 SMS notification 🕘 🕅	
Save	Custom template Dynamic fields
New Custom template Subject: Your upcoming appointment is starting in approximately	
Sales call	
Your upcoming appointment is star	
Beminder/follow-up time *	
	Duration Subject/Event type 🛩

*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).

omer reminder - Customer notification	
🗳 Email notification 🕒 💭 SMS notification 🕘	
Save Custom template	Dynamic fields
Your upcoming appointment is starting in	



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.

## i 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.

K Event type: Support call			ent type Support call		
Overview	Customer notifications			2	
Scheduling options	The account has 996 SMS credits. Buy more credits				
Time slot settings Booking form and	Notification scenario	Email	SMS $(i)$	Template	
redirect	✓ Automatic booking				
Customer >	Booking made by Customer Sent to the Customer when the Customer makes	$\checkmark$		Default •	
Payment and cancel/reschedule policy	a booking.			CS 2nd tier template CS call template	
	> Booking with approval			Marketing template Sales template	
Public content	Public content Calendar event			Create a new template	
	> Reminders and follow-ups				

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  $\rightarrow$  relevant Event type $\rightarrow$  **Customer notifications**.

### i 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  $\rightarrow$  relevant Booking page  $\rightarrow$  **User notifications** (Figure 7).

Support call Booking page: Support call				Booking page	Support call	•	
Overview	User notifications						?
Event types	The account has 996 SMS credits. Buy more credits						
Associated calendars		Booking ow	ner	Dana Fisher		All users with Editor	
Recurring availability Date-specific	Notification scenario	Email	SMS	Email	SMS	privileges will be added to this table. Grant a user Editor	
availability	V Automatic booking						
Location settings User notifications	Booking made by Customer (1) Default						
Salesforce settings	> Booking with approval						
Public content	<ul> <li>Calendar event</li> <li>Reminders and follow-ups</li> </ul>						

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  $\rightarrow$  relevant Booking page  $\rightarrow$  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**  $\rightarrow$  **Users**  $\rightarrow$  **New user button**.