How to test a Custom notification template [Classic]

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	be: 15-minute meeting Event type 15-minute meeting	¥
Overview	Booking form and redirect	?
Scheduling options	1 Booking form	?
Time slot settings	Booking form Default Booking form	
Booking form and redirect	Your name*	
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).

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< 🚯 Event type	e: 15-minute meeting …		Eve	ent type	15-minute meeting	¥		
Overview	Customer notifications							
Scheduling options	The account has 996 SMS credits. Buy more credits							
Time slot settings Booking form and	Notification scenario	Email	SMS (i)	Temp	late			
redirect	✓ Automatic booking							
Customer >	Booking made by Customer Sent to the Customer when the Customer makes			Sale	s template	•		
Payment and	a booking.							
cancel/reschedule policy	> Booking with approval							
Public content	> 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	Notification scenario	Email S	SMS	privileges will be added to this table.				
Date-specific availability	Automatic booking							
Location settings	Booking made by Customer		√					
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 SMS notifications section.

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

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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.