



you can book me



Module 4 Resource Guide

# Notifications and other integrations





## Getting folks to book is only half the conversation. After they book a whole world of options is open for you to customize.

This resource will go in depth into the different types of notifications you can setup, and the different integrations you can also use.

You can setup emails, texts or webhooks to be fired or sent after a booking is made, if it gets cancelled, if it gets rescheduled, reminders before and follow ups after.

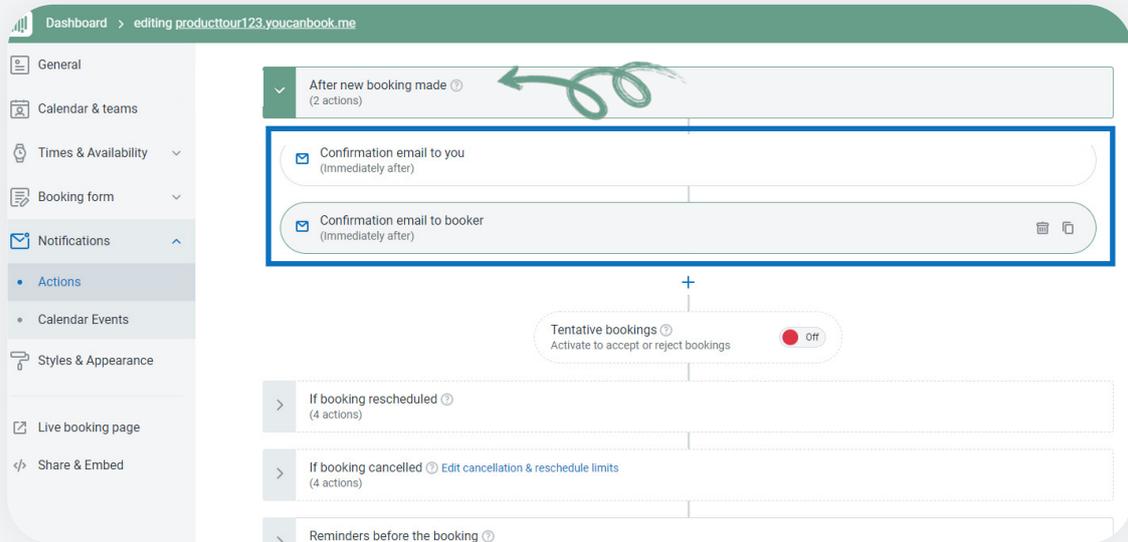
All of these triggers are seen within the **Notifications** section and under **Actions**:

The screenshot shows the dashboard for editing a product tour. The left sidebar contains a menu with the following items: General, Calendar & teams, Times & Availability, Booking form, Notifications (expanded), Actions (highlighted with a blue box and a green arrow), Calendar Events, Styles & Appearance, Live booking page, and Share & Embed. The main content area displays a list of notification triggers:

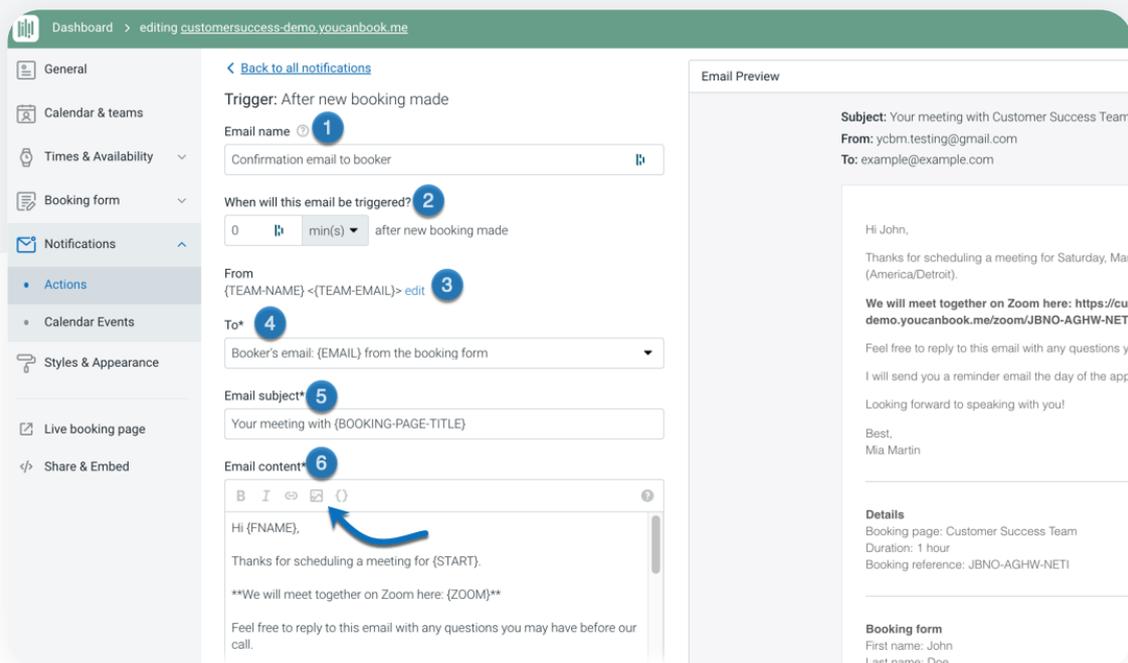
- After new booking made (5 actions)
- If booking rescheduled (4 actions)
- If booking cancelled (4 actions) [Edit cancellation & reschedule limits](#)
- Reminders before the booking (2 actions)
- After appointment ends (0 actions)



By default within the **After new booking made** trigger you will see an email to you and one to the booker. You have full control over adjusting the name and email of the sender and adjusting the content of the email.



When you expand each trigger you will see the actions associated with them. Then you can click into each email to adjust things.



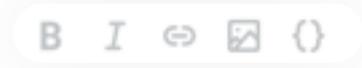


- 1 Email name:** Title this action something so you can remember it. Your booker will not see this email name, this is for your own reference.
- 2 When will this action be triggered:** Set how many minutes after booking this email will go out.
- 3 From:** Edit the email address that will send the notification to your booker. It will default to your account email address but can be any email address you've verified that you own. If a user replies to the confirmation email it will go to this address. If you have Gmail Integrated, it will automatically send from your Gmail address. If your email domain is DMARC protected, the email will send from [notifications@youcanbook.me](mailto:notifications@youcanbook.me).
- 4 To:** Select from the dropdown box who this email will go to - you, the booker, or a custom email. If you choose custom email, you can add additional emails by separating them with a comma and a space.
- 5 Email subject:** Title this email so that your bookers will open it right away. The default subject line of the confirmation email to you is {BOOKING-TITLE} which pulls the title from the Calendar event. You can edit the calendar event title, or remove this shorthand code and enter your own subject line.
- 6 Email content tips:** This message is completely customizable. Use shorthand codes to personalize the email depending on what options the booker selected for their booking - for example the name of the Team member they will be meeting with.  
  
By default, {FORMFIELDS} is included in the email - this will display all of the information your client provided on the booking form. If you want to only include certain information from the booking form, you'll want to delete this shorthand code, and only include the shorthand codes you want to be in the email. Working with FORMFIELDS.  
  
Reschedule and cancellation links are also included by default, so your booker can easily amend their booking without having to call you. {RESCHEDULE} and {CANCEL} are for your booker, {OWNER-RESCHEDULE} and {OWNER-CANCEL} are for you the account holder, and will trigger different reschedule emails.



## Markdown toolbar

Use the Markdown toolbar in the email content section to make text bold, italic, add a hyperlink. Use the {} icon to pull in any shorthand codes from your booking form.



Use the image icon to add a logo or image to your confirmation emails.

## Tentative Bookings

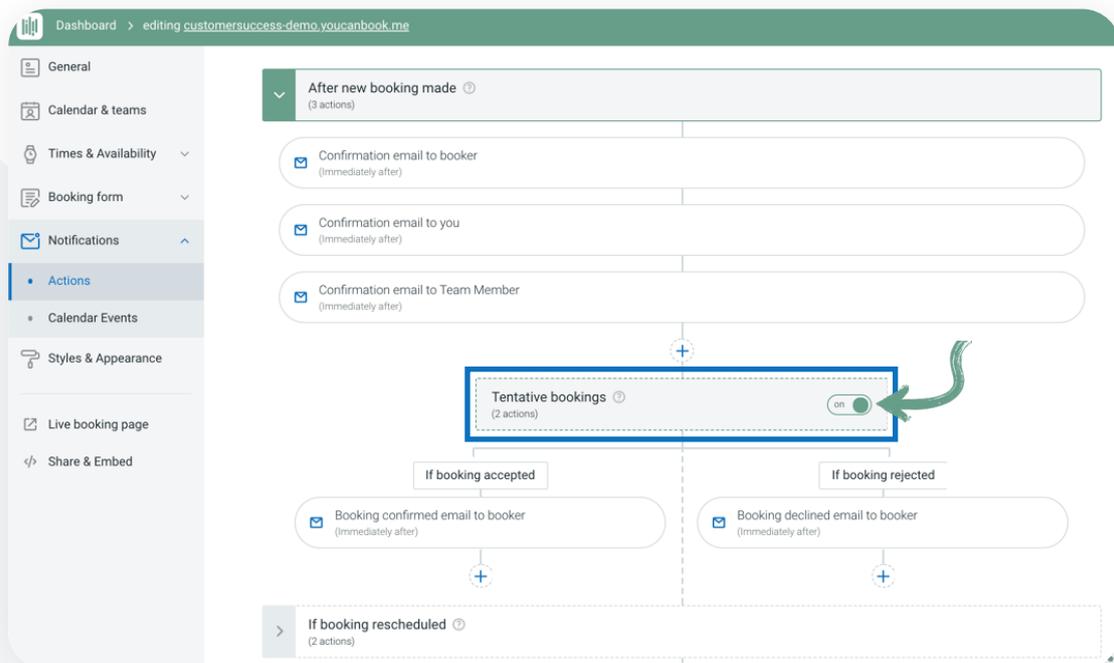
The Tentative Bookings feature as explained in Module 4 gives you final control over whether a booking will happen. The booking goes into your calendar with double question marks (??) until you decide to accept or reject it.

### If you do turn on Tentative Bookings, keep these things in mind:

- You'll want to customize the initial confirmation email to your booker so they know the booking is not yet confirmed.
- In the email to yourself be sure to keep this line of text:  

```
{IF-TENTATIVE}**This booking has not yet been confirmed.** {ACCEPT} {REJECT} {ENDIF-TENTATIVE}
```

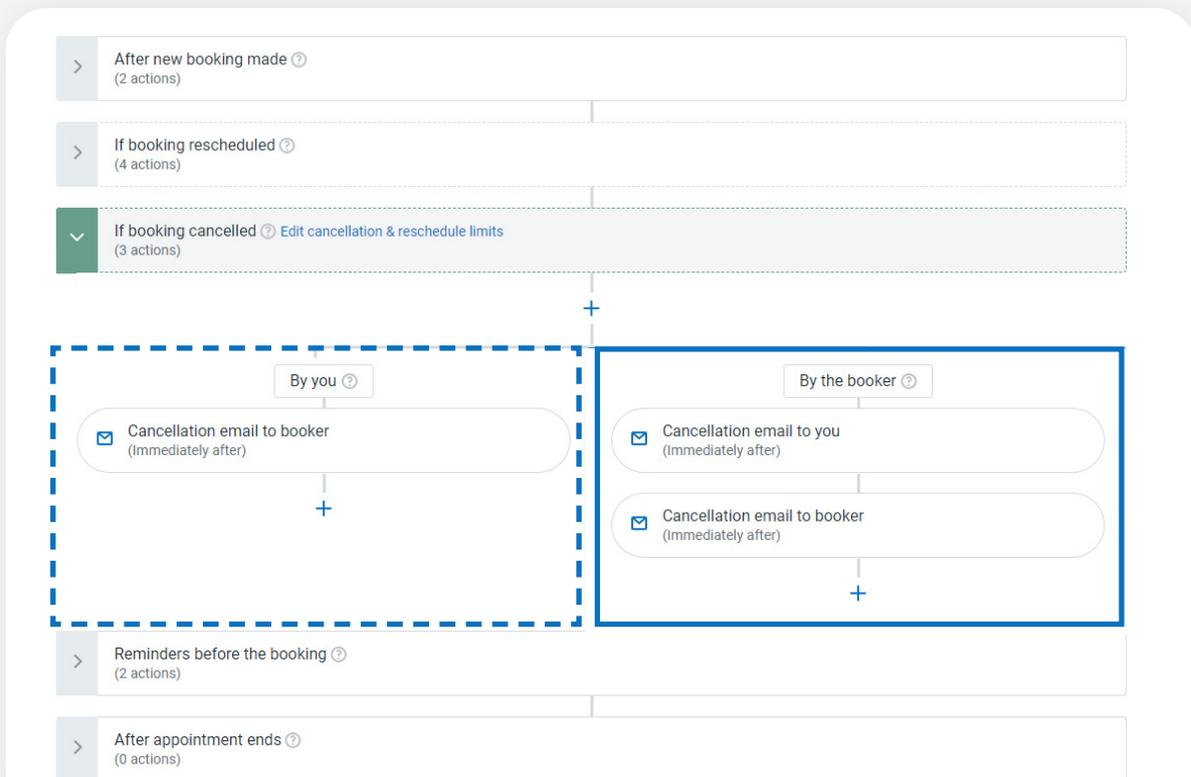
 This line will add the ACCEPT/REJECT button into your email so you can accept or reject the booking from your inbox without logging into YouCanBook.me.
- Bookings that are not accepted will not trigger any reminder emails to the booker or yourself.





For **Reschedules and Cancellations** you will see a different workflow. This is because you can send a specific email based off of who is canceling or rescheduling the booking.

You will see two paths.



On the left side is if you **the Owner is cancelling/rescheduling** by clicking the {OWNER-CANCEL} or {OWNER-RESCHEDULE} links in the email, or adjusting the booking in the bookings dashboard.

On the right side is if **the Booker is cancelling or rescheduling** by clicking the {CANCEL} or {RESCHEDULE} links in the email that is sent to them.





## Shorthand codes

You may be confused by all of the { } that you are seeing. These tiny little variables are called **Shorthand codes**. Essentially this allows the system to dynamically create and fill in content about the booker and booking.

You have full control over setting this up on your booking form to adjust things as you need to. By default you will see {FNAME} for first name, {LNAME} for last name and {EMAIL}, but that is just the beginning.

Shorthand codes allow you to personalize the experience for your booker. There is no limit to what you can setup.

A complete glossary of Shorthand codes here:

<https://support.youcanbook.me/article/660-shorthand-glossary>

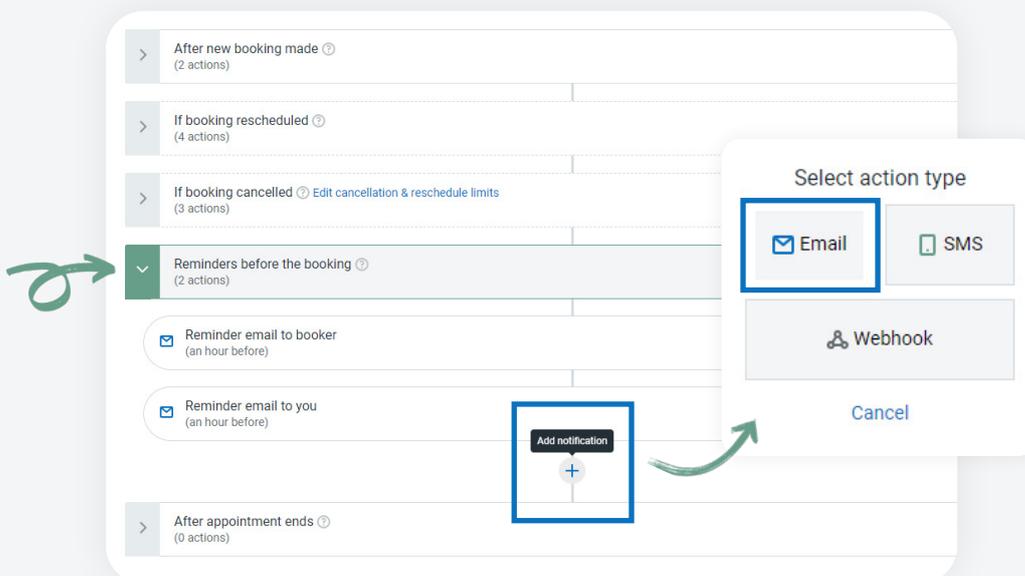
Setting up your own as well:

<https://support.youcanbook.me/article/231-using-shorthand-codes-to-customise-your-communications>



## Adding an Email

If you need to add another email you can head to the **Actions** workflow and expand the trigger (when the email will be sent). Then click the “+” and choose **Email**.



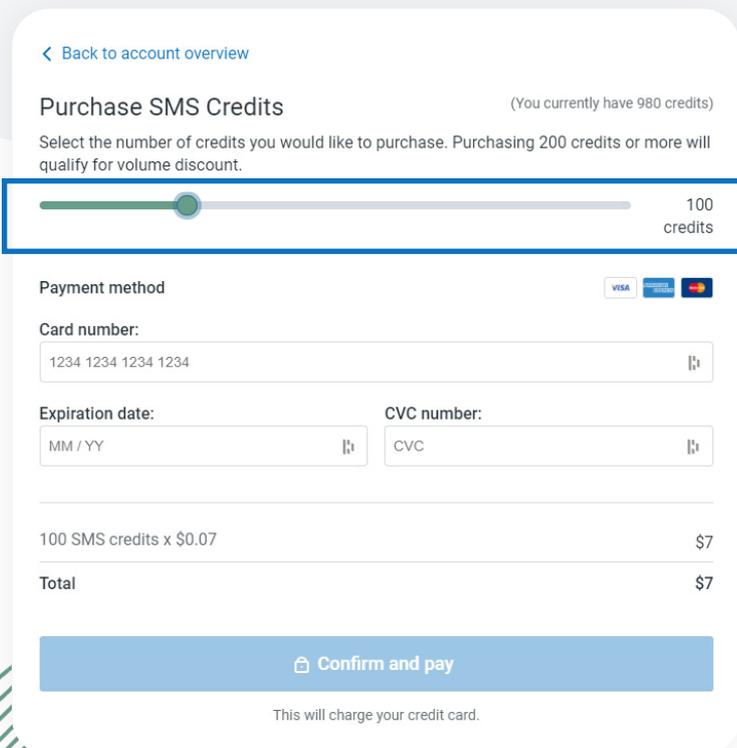
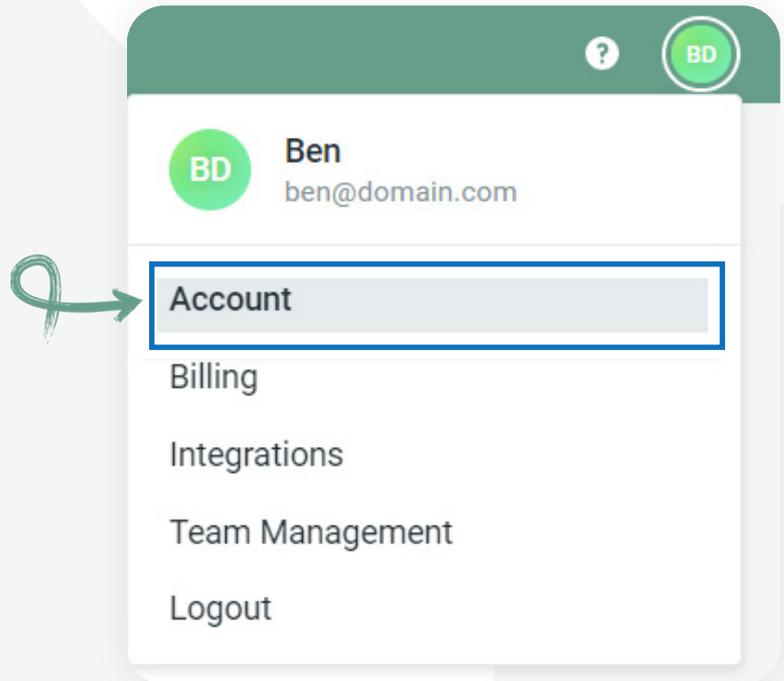
Then the email screen will appear and you can adjust anything you need to change as mentioned previously.



## Sending an SMS Notification

To send an SMS you first will need to purchase **credits**. Credits are \$.07 (US) / €0.05 (EUR) / 5p (GBP). The minimum purchase amount is 20 credits.

To purchase click your initials in the top right of your Dashboard and click **Account** then in the menu on the right **Buy SMS Credits**.



You will use the slider to adjust how many credits you would like to purchase.

If you haven't setup a paid subscription and are still on a trial you will need to add your credit card, otherwise the system will use the card on file.



After the SMS credits have been purchased you need to add the SMS phone number field to your booking form.

To do this pull up the booking form, click **add a new question** and choose **Phone**. Be sure that mobile number is checked.

The screenshot shows the 'Booking form' editor interface. On the left, a sidebar menu has 'Booking form' selected, with a sub-menu 'Questions' highlighted. A green arrow points from this menu to the main content area. In the main content area, the 'Add question' button is highlighted with a blue box. Below it, the 'Type' dropdown menu is open, showing various question types. The 'Phone number' option is highlighted with a blue bar. A green arrow points from the text below to this option.

Choose **Phone Number** in the type drop down.



Choose a **Shorthand code** and make sure that **Mobile phone** is checked.



[← Back to booking questions](#)

Type  
Phone number

Label  
Phone number

Shorthand code <sup>?</sup>  
MOBILE 2-16 characters

+ Add text after the question

Mobile phone

This is a required field

**Save all changes**

Once this is setup head back to the **Notifications** workflow and open up the trigger where you want the SMS to be sent. Click the plus button as before, but this time choose **SMS**.



General

Calendar & teams

Times & Availability

Booking form

Notifications

**Actions**

- Calendar Events
- Styles & Appearance
- Live booking page
- Share & Embed

After new booking made <sup>?</sup> (2 actions)

- Confirmation email to you (Immediately after)
- Confirmation email to booker (Immediately after)

Select action type

- Email
- SMS**
- Webhook

Tentative Activate

Cancel

Off

If booking rescheduled <sup>?</sup> (4 actions)

If booking cancelled <sup>?</sup> Edit cancellation & reschedule limits (3 actions)

Reminders before the booking <sup>?</sup> (2 actions)

After appointment ends <sup>?</sup> (0 actions)



Use the **Send to** and select **MOBILE** or the **Shorthand code** you used on the booking form question. You also can setup an SMS notification to be sent to your self, simply select **Custom number** and add your mobile number in the field provided.

< Back to all notifications

**Trigger:** After new booking made

**SMS name** <sup>?</sup>

Confirmation SMS to booker

**When will this SMS be triggered?**

0 min(s) after new booking made

**Send to**

Enter a custom phone number

{MOBILE} - Phone number from your booking form

Enter a custom phone number

{MOBILE-QUESTION-CODES}

**Message\*** <sup>?</sup> (Approx 1 SMS credit)

Thanks for scheduling a meeting with {BOOKING-PAGE-TITLE} for {START}.

Delete this SMS

You can customize the message to include anything you need. Keep in mind that 160 characters is 1 credit, the more text you add the more it will cost to send.

Here is an [overview of SMS notifications](#).

Within the **Notifications** workflow you can add emails and SMS notifications to any trigger. You can adjust the delay for when they are sent and can control the content of the messages.



## Calendar Event

Within the **Notifications** section the other important piece is the Calendar event found here:

The screenshot displays the configuration interface for calendar events. On the left, a sidebar lists various settings categories: General, Calendar & teams, Times & Availability, Booking form, Notifications (selected), Actions, Calendar Events (highlighted), Styles & Appearance, Live booking page, and Share & Embed. A green arrow points from the 'Calendar Events' item in the sidebar to the main configuration area. The main area is titled 'Your calendar event' and 'Booker calendar event'. It contains several sections: 'Your calendar event title' with a text input field containing '{FNAME} and {BOOKING-PAGE-TITLE}'; 'Your calendar event description' with a text area containing 'Booking page: {BOOKING-PAGE-TITLE}', 'Duration: {DURATION}', 'Booking reference: {REF}', and '{FORMFIELDS}'; 'Event location' with a dropdown menu set to 'Google Meet' and a note: 'We'll create a new meeting link and add it to the location. Use {GOOGLEMEET} to output the meeting link in your confirmation and reminder emails.'; and 'Invite participants to your calendar event' with a toggle switch set to 'On' and a text input field containing 'All booking form emails' and 'Type another email'. At the bottom, there is a button labeled 'No changes to save'.

For calendar events you can either invite the booker as a participant and share the calendar event with them, or you can setup a separate calendar event only for them. The default is setup with inviting the booker. The benefit of this is that they will get an email automatically from Google or Microsoft to add the event to their calendar.

Within the calendar event you can create a title and adjust the description and add an event location. As you see you can use the powerful **Shorthand codes** again to personalize the calendar event with any details you want about the booking.



Under the **event location** you can select Google Meet (if you integrate a Google calendar) Zoom (which you also need to [integrate](#)).

This will create a link that will look like this:

[yourlink.youcanbook.me/zoom/ABCD-EFGH-IJKL](#) or  
[yourlink.youcanbook.me/google-meet/ABCD-EFGH-IJKL](#).

Note that **yourlink** is the subdomain of your booking page and ABCD-EFGH-IJKL will be replaced with the **unique Booking Ref#** for the bookers booking.

At the time of the meeting your booker and you will click the link and you will be forwarded into the Zoom or Google Meet meeting space to start the conversation.

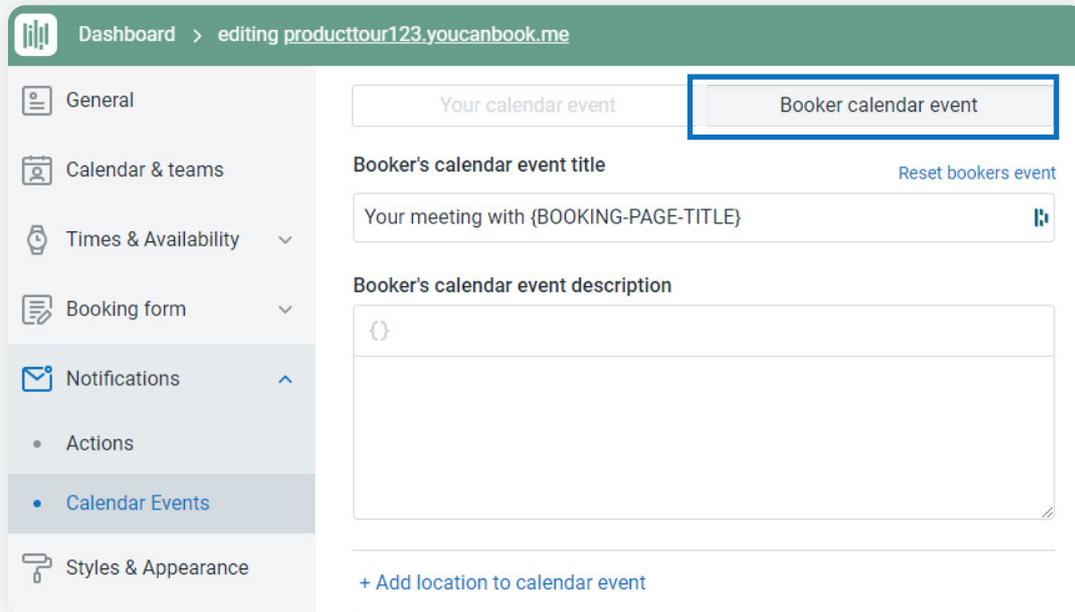
## Booker Calendar Event

If you decide to have a separate event for your bookers you first need to turn off the participation feature here:

The screenshot shows the 'Booker calendar event' settings panel. The left sidebar contains a navigation menu with the following items: General, Calendar & teams, Times & Availability, Booking form, Notifications, Styles & Appearance, Live booking page, and Share & Embed. The 'Calendar Events' item under Notifications is selected. The main panel has two tabs: 'Your calendar event' and 'Booker calendar event'. The 'Booker calendar event' tab is active. The settings include: 'Your calendar event title' with a text input containing '{FNAME} and {BOOKING-PAGE-TITLE}'; 'Your calendar event description' with a text area containing 'Booking page: {BOOKING-PAGE-TITLE}', 'Duration: {DURATION}', 'Booking reference: {REF}', and '{FORMFIELDS}'; 'Event location' with a dropdown menu set to 'Google Meet'; and 'Invite participants to your calendar event' with a toggle switch set to 'On'. A blue box highlights the 'On' toggle, and a green arrow points to it from the right. At the bottom of the panel is a 'No changes to save' button.



When you do this you then can adjust the **Booker Calendar** event here:

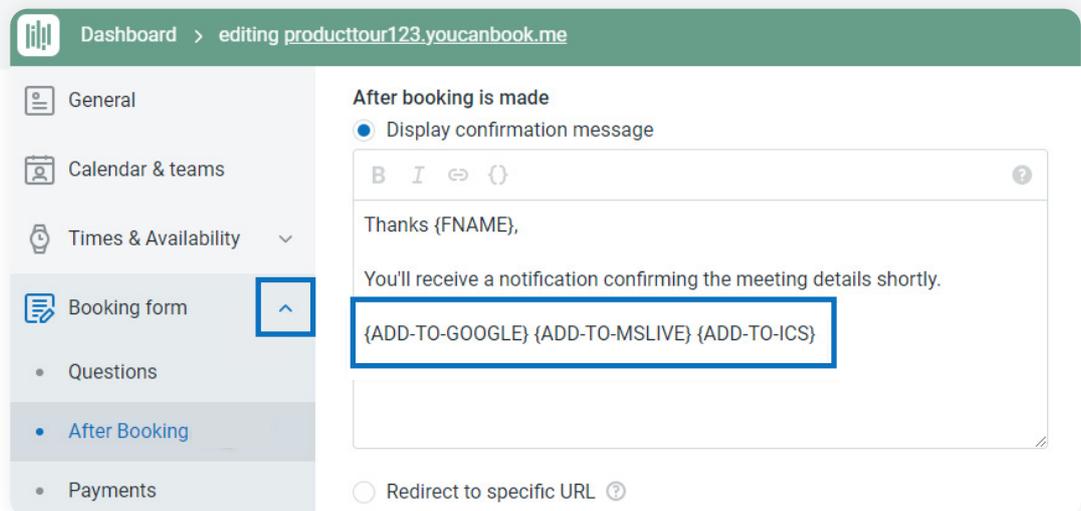


You can customize the title and description and add a location for the **Booker event** as well.

The important thing to keep in mind that when you setup this the Booker will not automatically be invited. They will need to download the calendar event.

You will need to add the following buttons to the confirmation email:  
{ADD-TO-GOOGLE} {ADD-TO-MSLIVE} {ADD-TO-ICS}

You also can add this to the **After booking message**:

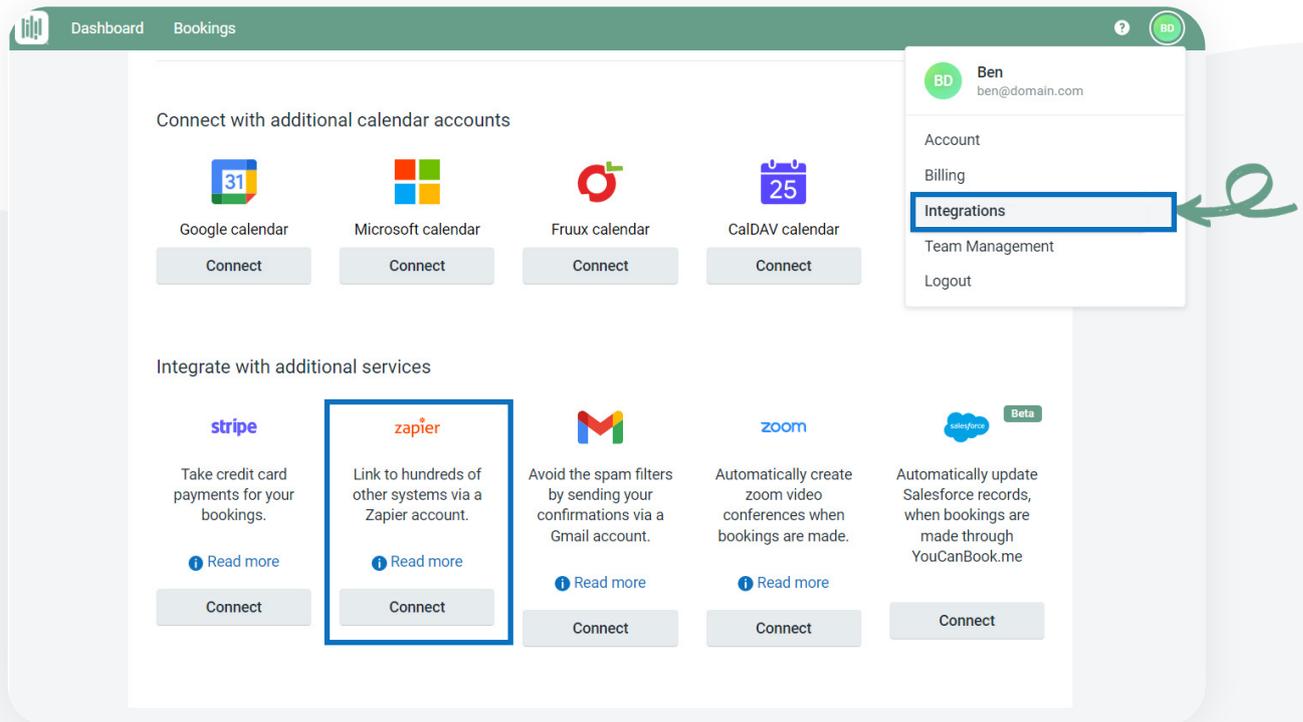




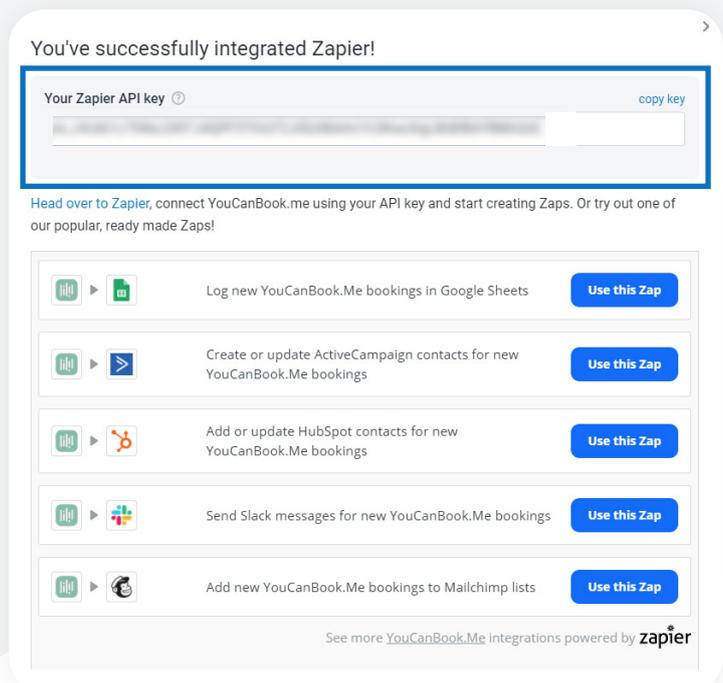
## Zapier

With a tool like Zapier you can connect the booking data through to over 4,900 apps. This allows you to pass booking data into your email service provider (Mailchimp), into Slack, into Google Sheets, or practically anywhere else.

To get Zapier setup you first need to get a key. Click your initials in the top right, integrations and then click on Zapier.



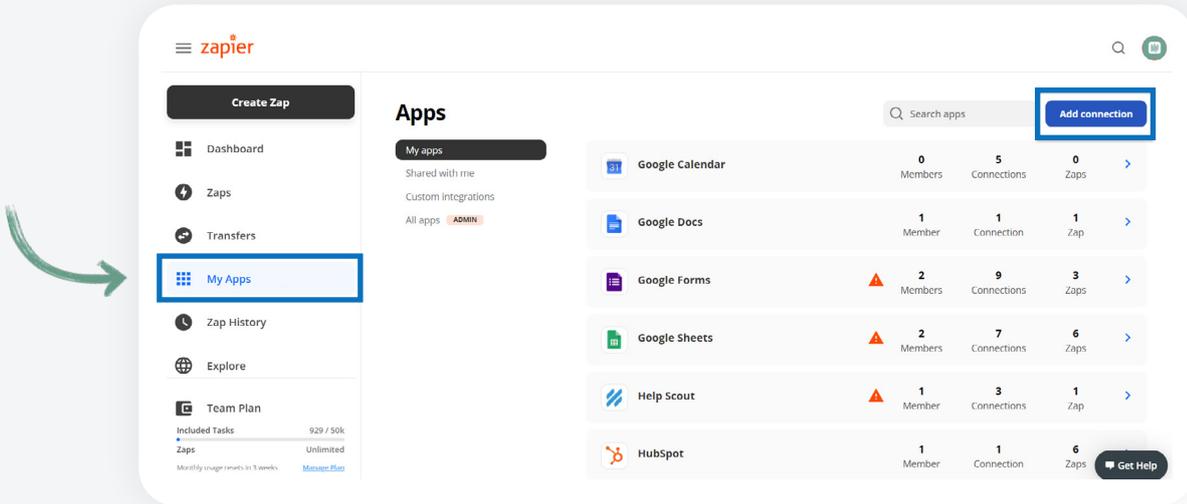
Copy your Zapier key:





Next head over to **Zapier** and either login or setup a free account:  
<https://zapier.com/>

Click **My Apps** then **Add a Connection**.



### Add a new app connection

Add a new app connection

Search: YouCanBook.me

YouCanBook.Me

In the list search for **YouCanBook.me**

Past in your Zapier Key and click **Continue**.



**Allow Zapier to access your YouCanBook.Me Account?**

API Key (required)

Each account on YouCanBook.me has its own unique Zapier Key.

Here are the steps you to get your key:

1. [Login to YouCanBook.me](#)
2. Click on the cog menu next to your email address (top right)
3. Select 'integrations'
4. Scroll down and click the Zapier logo
5. Copy and paste the Zapier Key into the box below

Please remember to keep the key secret and safe.

Yes, Continue

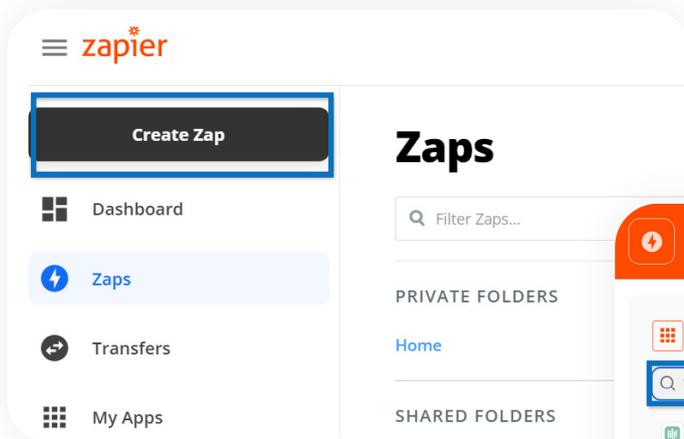
Cancel



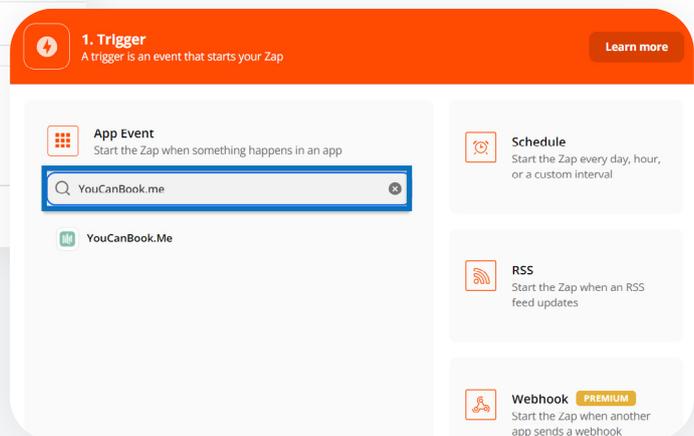
Once you have things connected you can start to setup **Zaps**.

Zaps are workflows that are triggered and then results in a number of actions. With YouCanBook.me's native Zapier integration you can trigger a Zap when a new booking is made.

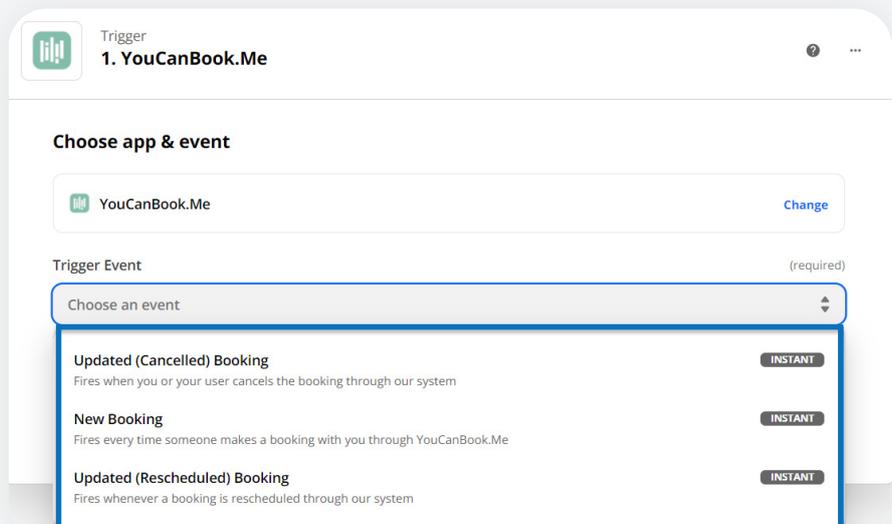
Click **Create Zap**:



Search YouCanBook.me and select the option:

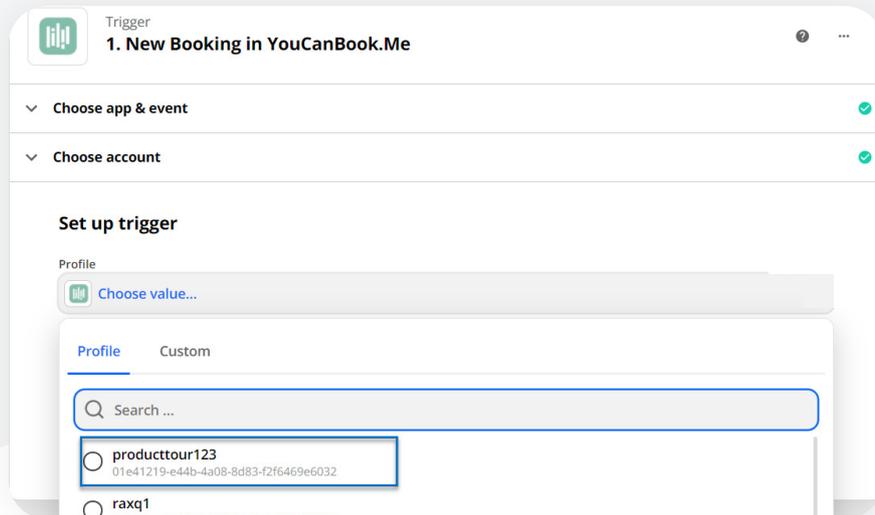
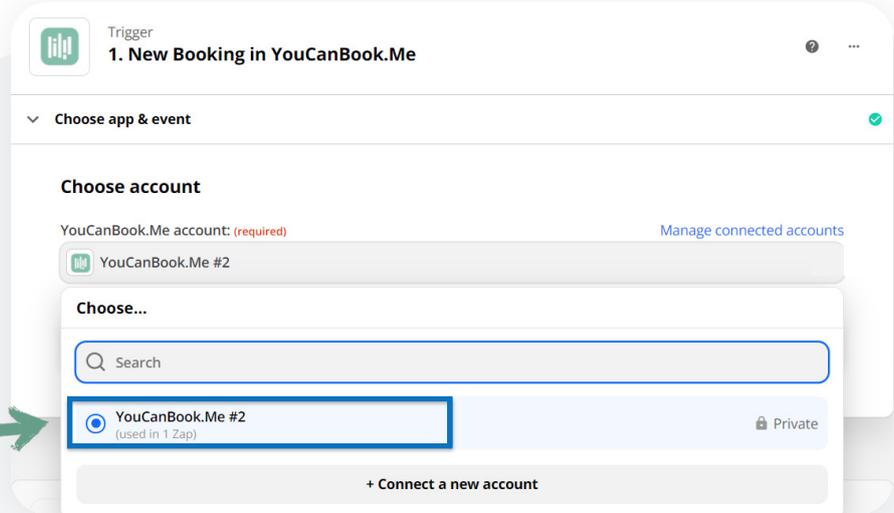


Next choose if you want to trigger when a booking is made, if it is rescheduled, or if a booking is cancelled.



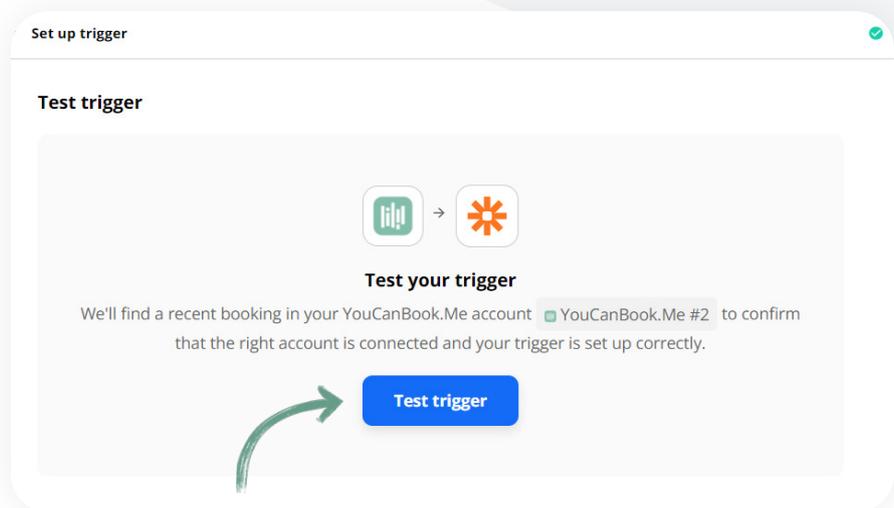


Choose your  
YouCanBook.me  
account



Choose the  
booking page you  
are working with

Click on Test Trigger





In a separate window go to your booking page and put in a test booking. This may take a few minutes to sync. You may need to hit **Test Trigger** a few times.

Once a booking is found you will see the data coming through.

The screenshot shows the Zapier 'Set up trigger' window. The trigger is 'Test trigger' with the message 'We found a booking!' and details for 'Booking A'. Below the trigger details is a list of metadata including ID, CREATED, DURATION, EMAIL, and various ISO timestamps. Overlaid on this is the '2. Action' selection screen, which features a search bar for apps and a grid of app options including Google Calendar, Google Docs, Google Forms, Google Sheets, HelloSign, Help Scout, HubSpot, Slack, Trello, and YouCanBook.Me. To the right of the app grid are several action types: Path, Filter, Format, and Delay, each with a brief description.

From there then you can choose an **Action**, what will happen when a new booking comes through YouCanBook.me



You can check out [Zapier's knowledge base](#) for more information on what could be possible, the only limit is your imagination!

Also additional information on our [Knowledge base](#).

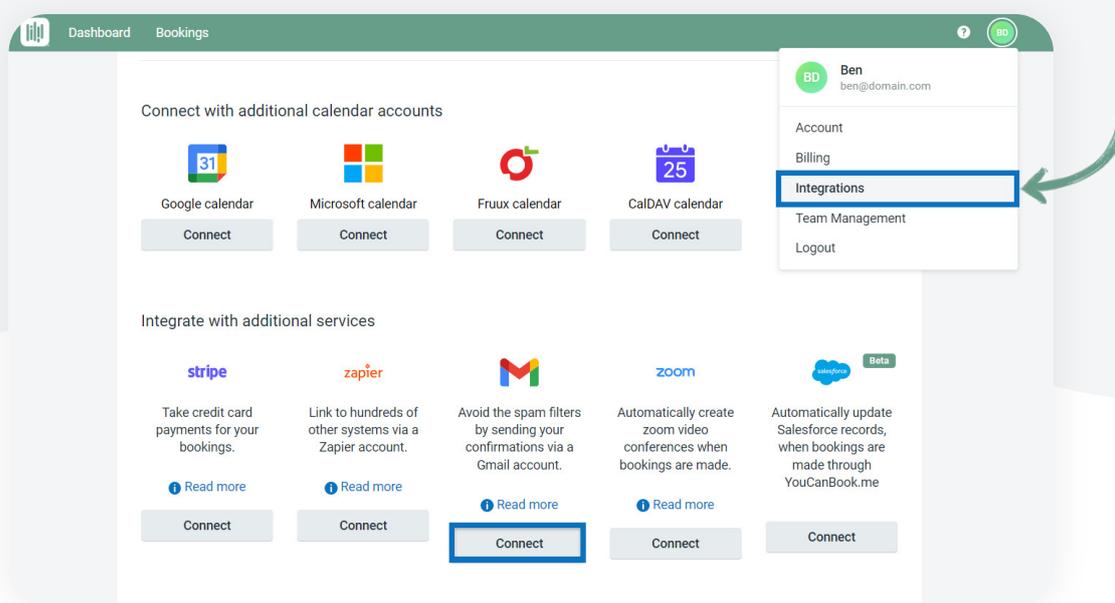
And a [troubleshooting article](#) that may be helpful.

## Gmail integration

Sometimes there could be email issues where your domain has strict security settings and we as a third party are not able to deliver messages on your behalf. If this is the case and you have a Google account you may want to explore our Gmail integration.

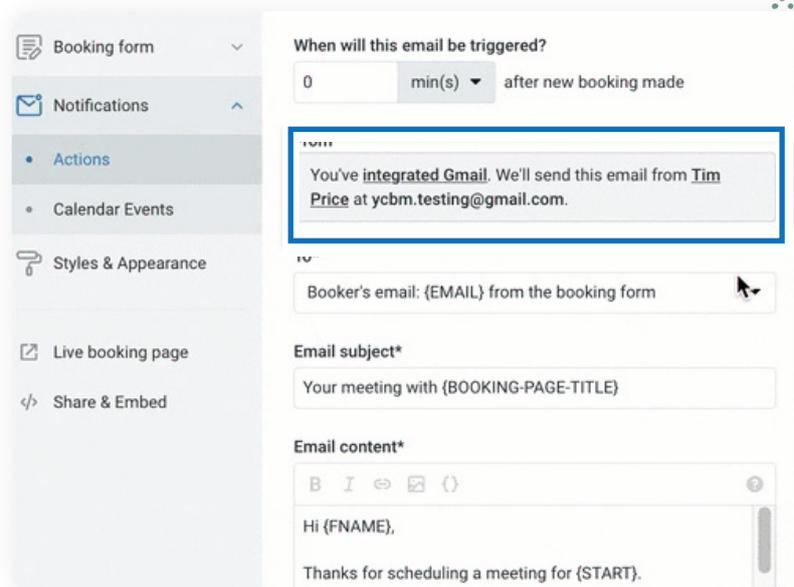
When this is setup every email that the system will send will be routed through your Gmail address. You will see a sent receipt in your sent folder. This should allow all messages to be sent.

Like with Zapier click your email in the top right of your **Dashboard** then **Integrations** and click on **Gmail** at the bottom:



Once you run through an accept everything is connected when you check on your notifications the **From** address will show your connected Gmail address.

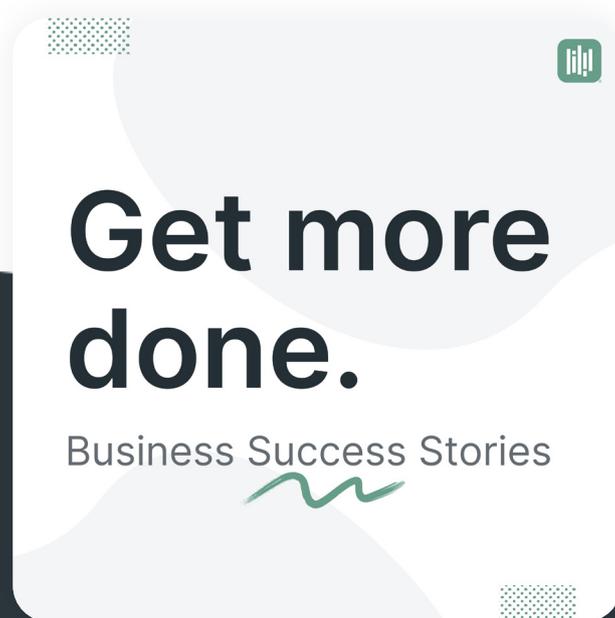
You can get more information on the Gmail integration [here](#).





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