

Scheduler Settings Pages

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- [Online Scheduler Settings \(Event Scheduling\)](#)
- [Admin View Settings page](#)

Online Scheduler Settings (PTA Product)

Booking Settings

Booking Window

Booking Opens

Select the date and time you would like the scheduler to open for participants.

Booking Closes

Select the date and time the scheduler should close and no longer accept bookings.

Admins can access the scheduler at any time

Check this to ensure Administrators can access the scheduler even when it is closed to the public.

For schedulers with multiple booking dates, close booking:

Close booking at a **specific time of day, XX days** before the appointment.

Close booking **XX hours/days/weeks/months** before the appointment

Close booking **XX hours** before the first appointment of the day.

Booking Limits:

Maximum per Event

Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.

Maximum Per Child

Sets a cap on the number of appointments allowed for each individual student. Set to 0 for no limits.

One appointment per teacher per student

Restricts parents to one booking per teacher, regardless of the number of classes or students involved.

One appointment per class

Restricts bookings to one per class, even if multiple students from the same family are enrolled in it.

Allow back-to-back

When disabled, the system prevents consecutive bookings with different teachers to allow for travel time.

Cancellation Policy

Customer may cancel their appointment up to XX hours/days/weeks.

Use this setting to prevent participants from cancelling their appointments within a specific timeframe (hours, days, or weeks) before the scheduled start time. Set this value to 0 if you wish to allow cancellations up until the last minute. Conversely, a very high value effectively disables the cancellation option for participants.
Note: Closing the scheduler only prevents new bookings; it does not stop participants from cancelling existing appointments unless this lock-out period is active.

Share Your Scheduler

Scheduling Link

Account Scheduling Link

Displays all available events on the scheduler. If you have only one open event on the vendor account, we recommend that you use the Scheduling link for the account.

Event Scheduling Link

Displays the scheduler of the selected event with the ability to select other available events on this account.

Customize the event link

Allows you to customise the scheduling link for the selected event parameter.

Scheduling link for the category

Displays the scheduler with the list of event(s) of the selected category.

Display Settings

Scheduler Display

Initial Table Layout:

Condensed

Compact layout with variable time steps — good for smaller screens or quickly browsing availability

Expanded

Fixed time intervals in a traditional layout — easier for comparing exact appointment lengths/gaps

Navigation Style:	
Display calendar to navigate over dates	Displays a calendar interface to help users browse different dates easily.
Display paginator to navigate over dates	Allows the display of multiple dates with slots on one page.
Scheduler Display Limits	
Display X weeks/days of slots	Determines the volume of days or weeks visible to the customer at one time.
Teacher Display	
Display description	Add Teacher Description to the teacher's legend on the CUI.
Separate legend for each child <i>(Regular PTA only)</i>	Generates an individual schedule legend for each student for better clarity.
Display class names	Enable this to show specific class names alongside teacher names on the scheduler. Note, if a student is enrolled in multiple classes with the same instructor, the teacher will be listed individually for each class. This allows parents to book a separate appointment for each specific teacher/class combination.
Sort by Group Name	Group teachers by categories (e.g., Lower School vs. Upper School) to simplify the selection process.
ADVANCED SETTINGS	
Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
Allow a parent to make conflicting appointments for themselves	Enables parents to book multiple appointments that occur at the same time.
Allow customers to see and cancel past appointments	Lets parents view/cancel appointments that have already passed
Don't allow customers to change appointment time	Prevents parents from rescheduling once booked

Online Scheduler Settings (Event Scheduling)

Booking Settings

Booking Window

Booking Opens	Select the date and time you would like the scheduler to open for participants.
Booking Closes	Select the date and time the scheduler should close and no longer accept bookings.
Admins can access the scheduler at any time	Check this to ensure Administrators can access the scheduler even when it is closed to the public.

For schedulers with multiple booking dates, close booking:

Close booking at a specific time of day, XX days before the appointment.

Close booking XX hours/days/weeks/months before the appointment

Close booking XX hours before the first appointment of the day.

Booking Limits:

Maximum per Event	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
Maximum Per Child	Sets a cap on the number of appointments allowed for each individual student. Set to 0 for no limits.
Duration between appointments	Enter a duration to prevent customers from booking too frequently. If a customer attempts to book within this window, they will see your custom "Cannot Book" message.
per resource	Restricts the frequency of bookings with a specific staff member or room. Select this to allow customers to book again quickly as long as they choose a different resource.

Cancellation Policy

Customer may cancel their appointment up to XX hours/days/weeks .	Use this setting to prevent participants from cancelling their appointments within a specific timeframe (hours, days, or weeks) before the scheduled start time. Set this value to 0 if you wish to allow cancellations up until the last minute. Conversely, a very high value effectively disables the cancellation option for participants. Note: Closing the scheduler only prevents new bookings; it does not stop participants from cancelling existing appointments unless this lock-out period is active.
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Share Your Scheduler

Scheduling Link

Account Scheduling Link	Displays all available events on the scheduler. If you have only one open event on the vendor account, we recommend that you use the Scheduling link for the account.
Event Scheduling Link	Displays the scheduler of the selected event with the ability to select other available events on this account.
Customize the event link	Allows you to customise the scheduling link for the selected event parameter.
Scheduling link for the category	Displays the scheduler with the list of event(s) of the selected category.

Display Settings

Scheduler Display

Display Scheduler in a: date, text, list, vertical, table format	<u>There are five ways you can display your slots.</u> 1. Table * This is the only option for PTA events. 2. Text 3. List 4. Vertical 5. Date
Display calendar to navigate over dates	Displays a calendar interface to help users browse different dates easily.
Display paginator to navigate over dates	Allows to display of multiple dates with slots on one page.
Shows end times	Displays the end time of the slot.
Show Number of Available Openings	Show the number of appointment slots for the appointment time.
Display X weeks/days of slots on the scheduling page with a max capacity of XXX slots per day	Determines the volume of days or weeks visible to the customer at one time.

Display X days of time slots	Enter a value here if you would like to display only a certain number of days/weeks/months to your customer.
Limit visible openings to x per slot and reveal the next available slot when xx% of slots are booked	This will allow you to initially display only part of the available appointments per slot on the online scheduler. You can set the number of slots you would like initially to show up on the scheduler. The default is set to 100%, but can be adjusted. Once your selected % of slots is booked, the rest will open up.

Resource Display

Note: different options will appear depending on the selected scheduler display format

Hide resources on the Scheduling Page	When using the Text, Vertical, or List displays, these options appear to allow you to show or hide the resources for your participants.
Resource selection format (only active if the resources are NOT hidden):	When using the Text, Vertical, or List displays, you can opt to show the resources in a drop-down, vertically or as buttons.
Custom label for Resource	Create a custom label for Resource
Display resource description	When using the Table or Date display, you can add the description to the resource's legend on the CUI.
Display room	When using the Table or Date display, the scheduler will show the Room value on the scheduler in the list of resources, next to the resource's name.

ADVANCED SETTINGS

Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
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Multiple Appointment Booking

Allow customers to take multiple slots

This allows your customer to book more than one slot per appointment time.

Allow overlapping appointments

Enables customers to book multiple appointments that occur at the same time.

Appointment Changes

Allow customers to see and cancel past appointments

Permits users to view their history and manage appointments that have already passed.

Don't allow customers to change appointment time

Removes the ability for participants to reschedule their existing appointment times.

Appointment Limit for Resources: A resource is whoever or whatever holds the slots - staff, a room, or any entity you choose.

Maximum appointments per resource per day

Limits how many appointments a single resource (e.g., a teacher) can accept daily, regardless of total available slots. Set to 0 for no limits.

Student Selection

Require parents to select their student's name from a dropdown menu. (Note: This requires student data to be imported first.)

Allow customers to select a timezone from the list of allowed timezones

Check if you want to display a drop-down of time zones to your customers so that they can change the time zone they can view and book their slots in.

Admin View Settings page

Appointment Tab Settings	
Resources Display:	Will show resources on the right-hand side
Slot Generator:	Check this box if you would like Admins to see the "Appointment type" dropdown in the Slot Generator and Slot Updater pop-ups. By default, the "appointment type" is set to 'in-person', so you do not have to activate this option unless you need 'virtual' appointments.
Appointments Display:	
Show custom appointment fields in the left-hand sidebar	If this box is checked, then your service will appear in the appointments box.
Show appointment fields on the left-hand side	This will display your appointment fields on the left-hand side of the appointments page.
When multiple appointments are in slot, sort by	This allows you to sort by names or the creation date.
Appointments Creation:	
Create a new contact if the person is not found in the system	If this box is checked when you use the appointments page and book an appointment for a new contact, that contact will be added as a new contact on the vendor account.
Appointments Grid:	
Start Display at:	Determines at what time your scroll bar begins (on a 24-hour clock)
End Display at:	Determines at what time your scroll bar ends (on a 24-hour clock)
Draw Time Label Every:	Determines the time interval drawn on the view bar of the appointments page on the VUI and CUI (when the table option is selected).
Draw Gray Indicator Line Every:	Determines the time interval during which the gray line is drawn on the view bar.
Minimal slots height:	Determines the slot height.

Adjust automatically

When checked, the system will automatically adjust depending on the duration of the created slots.