

# UI Setup page

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# UI Setup page (PTA Product)

<b>EVENT SETTINGS</b>	
<b>Scheduler Availability</b>	
<b>Open Scheduler to customers on</b>	Select the date and time you would like the scheduler to open for participants.
<b>Close Scheduler to customers on</b>	Select the date and time the scheduler should close and no longer accept bookings.
<b>Allow Admins access to the CUI at all times</b>	Check this to ensure Administrators can access the scheduler even when it is closed to the public.
<b>Appointment Number Limits</b>	
<b>Maximum Appointments per Event</b>	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
<b>If customer reaches maximum appts per event display</b>	Display "Maximum Appointments Reached" message. Optionally, you can adjust the default message.
<b>Maximum Appointments Per Resource per Day</b>	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.
<b>If customer reaches maximum appts per resource per day display</b>	Optionally, you can adjust the default message.
<b>Maximum Appointments per Child</b>	Sets a cap on the number of appointments allowed for each individual student. Set to 0 for no limits.
<b>If customer reaches maximum appts per child display</b>	Display "Maximum Appointments per Child" message. Optionally, you can adjust the default message.
<b>One appointment per teacher per student</b>	Restricts parents to one booking per teacher, regardless of the number of classes or students involved.

<b>One appointment per class</b>	Restricts bookings to one per class, even if multiple students from the same family are enrolled in it.
<b>Allow back-to-back</b>	When disabled, the system prevents consecutive bookings with different teachers to allow for travel time.
<b>Appointment Cancellation</b>	
<b>Customers cannot cancel their appointment closer than x hours/days/weeks</b>	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.
<b>Display "Call to Cancel" message</b>	Shows a specific instruction for participants to call the office if they try to cancel during the lock-out period.
<b>Close Appointment Booking</b>	
<b>Close Appointment Booking</b>	Automates when slots become unavailable (e.g., X hours before the appointment or X days before the event).
<b>If customer cannot book the appointment display</b>	Shows a 'Close appointment booking' message. You can adjust it.
<b>SCHEDULER SETTINGS</b>	
<b>Scheduling Link</b>	
<b>Scheduling link for the account</b>	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.
<b>Scheduling link for the selected event</b>	Displays the scheduler of the selected event with the ability to select other available events on this account.
<b>Customize the event link</b>	Allows you to customise the scheduling link for the selected event parameter.
<b>Scheduling link for the category</b>	Displays the scheduler with the list of event(s) of the selected category.

<b>Scheduler Display</b>	
<b>Display calendar to navigate over dates</b>	Displays a calendar interface to help users browse different dates easily.
<b>Display paginator to navigate over dates</b>	Allows to display of multiple dates with slots on one page.
<b>Scheduler Display Limits</b>	
<b>Display X weeks/days of slots</b>	Determines the volume of days or weeks visible to the customer at one time.
<b>Teacher Display</b>	
<b>Display resource description</b>	Add Teacher Description to the teacher's legend on the CUI.
<b>Separate legend for each child</b>	Generates an individual schedule legend for each student for better clarity.
<b>Display room</b>	Shows the Room value on the scheduler in the list of teachers, next to the teacher's name.
<b>Display class names</b>	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.
<b>Sort by Group Name</b>	Group teachers by categories (e.g., Lower School vs. Upper School) to simplify the selection process.
<b>ADVANCED SETTINGS</b>	
<b>Online Meeting Provider</b>	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
<b>Allow conflicting appointments</b>	Enables parents to book multiple appointments that occur at the same time.
<b>Allow customers to see and cancel past appointments</b>	Permits users to view their history and manage appointments that have already passed.
<b>Don't allow customers to change appointment time</b>	Removes the ability for participants to reschedule their existing appointment times.

# UI Setup page (Event Scheduling)

<b>EVENT SETTINGS</b>	
<b>Scheduler Availability</b>	
<b>Open Scheduler to customers on</b>	Select the date and time you would like the scheduler to open for participants.
<b>Close Scheduler to customers on</b>	Select the date and time the scheduler should close and no longer accept bookings.
<b>Appointment Number Limits</b>	
<b>Maximum Appointments per Event</b>	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
<b>If customer reaches maximum appts per event display</b>	Display "Maximum Appointments Reached" message. Optionally, you can adjust the default message.
<b>Maximum Appointments Per Resource per Day</b>	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.
<b>If customer reaches maximum appts per resource per day display</b>	Optionally, you can adjust the default message.
<b>Duration between appointments</b>	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.
<b>per service</b>	Prevents a customer from booking the same type of service within the set timeframe, regardless of the staff member.
<b>per resource</b>	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.

<b>If customer cannot book the appointment display:</b>	Optionally, you can adjust the default message.
<b>Appointment Cancellation</b>	
<b>Customers cannot cancel their appointment closer than x hours/days/weeks</b>	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.
<b>Display "Call to Cancel" message</b>	Shows a specific instruction for participants to call the office if they try to cancel during the lock-out period.
<b>Close Appointment Booking</b>	
<b>Close Appointment Booking</b>	Automates when slots become unavailable (e.g., X hours before the appointment or X days before the event).
<b>If customer cannot book the appointment display</b>	Shows a 'Close appointment booking' message. You can adjust it.
<b>SCHEDULER SETTINGS</b>	
<b>Scheduling Link</b>	
<b>Scheduling link for the account</b>	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.
<b>Scheduling link for the selected event</b>	Displays the scheduler of the selected event with the ability to select other available events on this account.
<b>Customize the event link</b>	Allows you to customise the scheduling link for the selected event parameter.
<b>Scheduling link for the category</b>	Displays the scheduler with the list of event(s) of the selected category.
<b>Scheduler Display</b>	

<b>Display Scheduler in a: date, text, list, vertical, table format</b>	<p><a href="#">There are five ways you can display your slots.</a></p> <ol style="list-style-type: none"> <li>1. Table * This is the only option for PTA events.</li> <li>2. Text</li> <li>3. List</li> <li>4. Vertical</li> <li>5. Date</li> </ol>
<b>Display calendar to navigate over dates</b>	Displays a calendar interface to help users browse different dates easily.
<b>Display paginator to navigate over dates</b>	Allows you to display multiple dates with slots on one page.
<b>Display the end time of each appointment slot</b>	Displays the end time of the slot.
<b>Display # of slots per appointment time</b>	Show the number of appointment slots for the appointment time.
<b>Scheduler Display Limits</b>	
<b>Display X weeks/days of slots</b>	Determines the volume of days or weeks visible to the customer at one time.
<b>Do not display slots after: from today</b>	Enter a value here if you would like to display only a certain number of days/weeks/months to your customer.
<b>Display maximum available appointment(s) per slot and show next only when % of them are booked</b>	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.
<b>Resource Display</b>	
Note: different options will appear depending on the selected scheduler display format	
<b>Resource title:</b>	When using the Table or Date display, you can customise the title of the Resource Display
<b>Hide/Show resources on the CUI</b>	When using the Text, Vertical, or List displays, these options appear to allow you to show or hide the resources for your participants.
<b>Display Resources</b>	When using the Text, Vertical, or List displays, you can opt to show the resources in a drop-down, vertically or as buttons.
<b>Display resource description</b>	When using the Table or Date display, you can add the description to the resource's legend on the CUI.

<b>Separate legend for each child</b>	When using the Table or Date display, you can generate an individual schedule legend for each student for better clarity.
<b>Display room</b>	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.
<b>Sort resources by available slots</b>	When using the Date display, the scheduler will sort resources by available slots.
<b>Miscellaneous:</b>	
<b>Require parents to select their student name from a drop-down when booking an appointment (requires that students have been imported to the account)</b>	Click this to require parents to select their student's name from a drop-down when booking an appointment.
<b>Allow customers to select a timezone from the list of allowed timezones</b>	Check if you want to display a drop-down of time zones to your customers so that they can change the timezone they can view and book their slots in.
<b>ADVANCED SETTINGS</b>	
<b>Online Meeting Provider</b>	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
<b>Allow customers to take multiple slots</b>	This allows your customer to book more than one slot per appointment time.
<b>Allow conflicting appointments</b>	Enables customers to book multiple appointments that occur at the same time.
<b>Allow customers to see and cancel past appointments</b>	Permits users to view their history and manage appointments that have already passed.
<b>Don't allow customers to change appointment time</b>	Removes the ability for participants to reschedule their existing appointment times.

# Vendor UI Setup page

<b>Appointment Tab Settings</b>	
<b>Resources Display:</b>	Will show resources on the right-hand side
<b>Slot Generator:</b>	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.
<b>Appointments Display:</b>	
<b>Show service in the appointment box</b>	If this box is checked, then your service will appear in the appointments box.
<b>Show appointment fields on the left-hand side</b>	This will display your appointment fields on the left-hand side of the appointments page.
<b>When multiple appointments are in slot, sort by</b>	This allows you to sort by names or the creation date.
<b>Appointments Creation:</b>	
<b>Create contact if not found</b>	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.
<b>Appointments Grid:</b>	
<b>Start Display at:</b>	Determines at what time your scroll bar begins (on a 24-hour clock)
<b>End Display at:</b>	Determines at what time your scroll bar ends (on a 24-hour clock)
<b>Draw Time Every:</b>	Determines the time interval drawn on the view bar of the appointments page on the VUI and CUI (when the table option is selected).
<b>Draw Gray Line:</b>	Determines the time interval during which the gray line is drawn on the view bar.
<b>Minimal slots height:</b>	Determines the slot height.
<b>Adjust automatically</b>	When checked, the system will automatically adjust depending on the duration of the created slots.