

UI Setup page (Event Scheduling)

EVENT SETTINGS	
Scheduler Availability	
Open Scheduler to customers on	Select the date and time you would like the scheduler to open for participants.
Close Scheduler to customers on	Select the date and time the scheduler should close and no longer accept bookings.
Appointment Number Limits	
Maximum Appointments per Event	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
If customer reaches maximum appts per event display	Display "Maximum Appointments Reached" message. Optionally, you can adjust the default message.
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.
If customer reaches maximum appts per resource per day display	Optionally, you can adjust the default message.
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 service	Prevents a customer from booking the same type of service within the set timeframe, regardless of the staff member.
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.
If customer cannot book the appointment display:	Optionally, you can adjust the default message.

Appointment Cancellation	
Customers cannot cancel their appointment closer than x 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.
Display "Call to Cancel" message	Shows a specific instruction for participants to call the office if they try to cancel during the lock-out period.
Close Appointment Booking	
Close Appointment Booking	Automates when slots become unavailable (e.g., X hours before the appointment or X days before the event).
If customer cannot book the appointment display	Shows a 'Close appointment booking' message. You can adjust it.
SCHEDULER SETTINGS	
Scheduling Link	
Scheduling link for the account	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.
Scheduling link for the selected event	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.
Scheduler Display	

Display Scheduler in a: date, text, list, vertical, table format	There are five ways you can display your slots. 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 you to display multiple dates with slots on one page.
Display the end time of each appointment slot	Displays the end time of the slot.
Display # of slots per appointment time	Show the number of appointment slots for the appointment time.
Scheduler Display Limits	
Display X weeks/days of slots	Determines the volume of days or weeks visible to the customer at one time.
Do not display slots after: from today	Enter a value here if you would like to display only a certain number of days/weeks/months to your customer.
Display maximum available appointment(s) per slot and show next only when % of them 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	
Resource title:	When using the Table or Date display, you can customise the title of the Resource Display
Hide/Show resources on the CUI	When using the Text, Vertical, or List displays, these options appear to allow you to show or hide the resources for your participants.
Display Resources	When using the Text, Vertical, or List displays, you can opt to show the resources in a drop-down, vertically or as buttons.
Display resource description	When using the Table or Date display, you can add the description to the resource's legend on the CUI.

Separate legend for each child	When using the Table or Date display, you can generate an individual schedule legend for each student for better clarity.
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.
Sort resources by available slots	When using the Date display, the scheduler will sort resources by available slots.
Miscellaneous:	
Require parents to select their student name from a drop-down when booking an appointment (requires that students have been imported to the account)	Click this to require parents to select their student's name from a drop-down when booking an appointment.
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 timezone they can view and book their slots in.
ADVANCED SETTINGS	
Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
Allow customers to take multiple slots	This allows your customer to book more than one slot per appointment time.
Allow conflicting appointments	Enables customers to book multiple appointments that occur at the same time.
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.

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