

Configure Settings

Event Settings (Online Scheduler Settings)

The **Online Scheduler Settings** page lets you adjust settings specific to a single event.

To get there:

- 1. From the Admin UI, go to **Events / Preview** and select your event.
- 2. Click **Go To Event** to open Event Management.
- 3. Select **Settings / Online Scheduler Settings**.

Work through the sections from top to bottom, as outlined below.

Booking Settings

Booking Window:

[image.png](#)

Setting	What it does
Booking Opens	Date/time the scheduler opens for parents
Booking Closes	Date/time the scheduler closes for parents
Admins can access the scheduler at any time	Lets admins access the parent scheduling page even when it's closed to parents.

For schedulers with multiple booking dates, close booking:

- 1. Close booking at a specific **time of day**, XX days before the appointment.
- 2. Close booking XX **hours/days/weeks/months** before the appointment.
- 3. Close booking XX **hours before the first appointment of the day**.

[image.png](#)

Booking Limits:

Setting	What it does
Maximum per Event	Caps total appointments allowed for the entire event
Maximum Per Child	Caps how many appointments a parent can book per child
One appointment per teacher per student	If checked, a parent can only book once with a given teacher per student, even if the student has multiple classes with that teacher
One appointment per class	If checked, a parent can only book once per class, even with multiple students enrolled in it
Allow back-to-back	If unchecked, parents can't book two appointments back-to-back unless they're with the same teacher (to allow travel time between teachers). Back-to-back is always allowed with the same teacher, or when travel breaks have been configured.

Cancellation Policy:

Customer may cancel their appointment up to XX hours/days/weeks. Restricts how close to the appointment time a parent can cancel.

- Set to **0** to allow cancellation up to the last minute.
- Set to a large value to effectively prevent cancellations.

Note: Closing the scheduler does **not** automatically prevent cancellations — this setting is separate.

Display Settings

[image.png](#)

Scheduler Display

Initial Table Layout:

Mode	Best for
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

Parents can toggle between views anytime using the button in the top-left corner of the scheduler.

Navigation Style:

Mode	Behavior
Paginator	Shows multiple dates on one page
Calendar	Shows one day at a time, with a mini calendar to jump to other dates

Display **X weeks of slots**: Sets how many days/weeks of slots are shown at once in the CUI. (*Only applies when Paginator is selected.*)

Teacher Display

Setting	What it does
Display description	Shows the teacher's description (via the info icon next to their name)
Separate legend for each child (<i>Regular PTA only</i>)	Adds a separate color legend per child
Display class names	Shows class names (via the info icon) if class names have been added on the Appointments page

Teacher Groups

Allows you to organise teachers into groups (e.g., "Lower School," "Upper School").

1. Enter your desired group names in this section.
2. Go to the **Appointments** page — each teacher row has a **Group Name** column where you can assign them to a group from the drop-down.

Advanced Settings

[image.png](#)

Online Meeting Provider

Use 'X' for online meetings: Select your preferred online meeting provider for this event from the drop-down.

Multiple Appointment Booking

Allow a parent to make conflicting appointments for themselves: If checked, a parent can book overlapping appointments at the same time.

Appointment Changes

Setting	What it does
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

Notification Setup

The [Notifications Setup](#) tab lets you configure: **Confirmation Email, Cancellation Email, Reminder Email, Custom Email, Follow-up Email, Resource Notification Email,** and **Calendar Event Notification.**

Confirmation Email

Field	What it controls
Subject	Email subject line
Header	Text shown above the email body
Body	Main email text
Send Confirmation and Cancellation Emails	Sends a confirmation after booking (<i>typically left unchecked for schools</i>)
Support Email	Address that receives replies to confirmation/reminder/cancellation emails. If left blank, replies get an automated response directing them to contact your organization.
Replace the Email Body with the Printable Schedule	Recommended. Sends one consolidated email with a table of all booked appointments, instead of one email per appointment.

Reminder Emails

Send Reminder Emails: Click **Add** and enter the number of hours before an appointment that a reminder should go out. You can add multiple reminder times — duplicates are automatically removed.

How reminders are grouped depends on your Printable Schedule setting:

- **If "Replace the Email Body with the Printable Schedule" is ON:** All appointments are grouped into a single reminder email per day, sent the configured number of hours before that day's **first** appointment. With reminders set at both 24 and 12 hours, you'll receive two emails — one at each interval before your first appointment of the day.
- **If it's OFF:** Appointments booked within the **same hour** are grouped into one reminder email. For example, 9:00, 9:15, and 9:30 AM appointments would be combined into one

email, while a separate 10:15/10:30 AM email would be sent independently.

Field	What it controls
Footer	Text shown below the email body
Subject for combined email	Subject line used when a combined email is sent (e.g., a cancel + immediate reschedule)

Recommended: Use the Printable Schedule as the Email Body

For both **Confirmation** and **Reminder** emails, you can replace the email body with a **Printable Schedule** — a table summarizing all of a parent's booked appointments (identical to what they'd see clicking "Printable Schedule" on the scheduler page).

To enable this: Check "**Replace the Email Body with the Printable Schedule of Appointments.**"

When enabled, the email will contain:

1. Your **Header** text
2. The printable schedule table
3. Your **Footer** text

The table's content/format is controlled separately under **Settings → CUI Messages → Print Schedule.**

With this option on, parents receive **one** email containing their full schedule — not one email per appointment.

Configure CUI (Customer User Interface)

You can customise most of the text and labels parents see when booking appointments.

To edit CUI messages:

1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To Event**.
2. Select **Settings / CUI Messages**.
3. On the left, choose a label to edit — the corresponding text appears on the right for editing.

Common customisations:

- **Login page title:** Edit under **Sign In Page / Welcome Message**.
 - **Logo:** Go to **Global Setup / Business**, under **Account Level Settings / Account Logo**, and click the **Upload** icon.
 - **HTML editing:** Click the **HTML icon** () in the toolbar to view/edit raw HTML for a given message.
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