

Creating Time Slots

Create Slots Function

The **Create Slots** function is used to generate appointment dates, times, and appointment durations for your event.

Accessing the Create Slots Function

1. Navigate to **Events / Preview** from the navigation menu.
2. Select your event from the list.
3. Click the **Appointments** button.
4. Select the **Appointments** tab.

On the left-hand side of the page, you will see a calendar. Select the date you would like to create slots for. If your event spans multiple days, begin with the first date.

On the right-hand side, you will see a list of your teachers/resources.

- If all teachers will use the same schedule, you do not need to select individual teachers.
- If teachers will have different schedules, select the teacher(s) you would like to create slots for before continuing.

Slot Menu Options

The **Slots** drop-down menu includes the following options:

- Create Slots
- Delete Time Slots
- Update Slots
- Copy Slots
- Move Slots

Select **Create Slots** to open the **Slot Generator** window.

Creating Appointment Slots

Step 1: Select Teachers

Choose whether the slots should be created for:

- Selected teacher(s) only
- All teachers/resources

Step 2: Configure Time Settings

- **From** - Enter the start time of the first appointment slot.
- **To** - Enter the ending time of the final appointment slot for the day.
- **Duration** - Enter the length of each appointment in minutes.
- **Travel Break** - Optionally enter a break duration between appointments.

Example:

- Duration: 10 minutes
- Travel Break: 5 minutes

This creates:

- 8:00-8:10
- 8:15-8:25
- 8:30-8:40
- etc.

Appointment Types

Select the appointment format you would like to offer.

In-Person

- Parents will receive the room/location information in their confirmation and reminder emails.
- Slots display with a **P** indicator.

Virtual

- Parents will receive the virtual meeting link in their confirmation and reminder emails.
- Slots display with a **V** indicator.

In-Person or Virtual

- Parents may choose either meeting format during scheduling.
- Slots display with a **PV** indicator.

Slot Types

Select how the slot should appear to parents.

Visible for Customer - The slot is visible and available for booking on the Online Scheduler (CUI).

Hidden from Customer - The slot is hidden from parents but remains visible in the Admin UI. This can be used for reserved appointments.

Shown with “Call” Status - The slot is visible, but parents are instructed to contact the school directly when selecting the appointment.

Make Unavailable - The slot appears in the Admin UI but cannot be booked online. This is commonly used for:

- Lunch breaks
- Planning periods
- Meetings
- Staff availability blocks

You may optionally enter a custom message for unavailable slots.

Maximum Appointments Per Slot

Use the **Maximum allowed appointments per slot** field to determine how many appointments can be booked during each time slot.

This is commonly used for:

- Group sessions
- Open lab hours
- Multi-family events
- Camp or roster scheduling

Creating Multiple Days of Slots

If multiple days will use the same schedule:

- Enable the **Multiple Dates** option
- Select the additional dates
- Create slots for all selected dates simultaneously

If each day has a different schedule:

1. Create slots for the first day
2. Select the next date from the calendar
3. Repeat the slot creation process

Creating Different Schedules for Different Teachers

If teachers/resources require different schedules:

1. Select the teacher or group of teachers

2. Create their slots and click save
3. Select the next teacher/group
4. Repeat as needed

To select multiple teachers:

- Hold the **Ctrl** key while selecting additional names. Continue this process until you have a group of teachers collected that you would like to create the same time slots for.

Note that if you have created the same slots for all your teachers, you will not see the individual slots displayed unless you select one of the teacher names (from the right-hand side). This allows you to create identical schedules for selected groups of teachers/resources.

Viewing Teacher Slots

If slots are created for all teachers at once, individual appointment slots may not immediately display.

To view a specific teacher's slots:

- Click on the teacher's name from the right-hand panel

Time Increment Display

The time increments displayed on the Appointments page automatically adjust based on your slot durations.

Examples:

- 10-minute slots → 10-minute display increments
- 15-minute slots → 15-minute display increments

If multiple slot durations exist, the display will use the lowest common denominator.

Example:

- 10-minute slots
- 15-minute slots

Result:

- Display increments become 5 minutes

To manually adjust display increments:

1. Navigate to **Settings / Vendor UI Setup**

2. Modify the **Draw Time Every** setting

If using Travel Breaks, you may also want to adjust this setting to align with your break duration.

Important Notes: Create Slots Does **Not** Replace Existing Slots

The Create Slots function only *adds* new slots. It does not automatically overwrite or remove existing slots.

Example:

- Existing slots: 8:00 AM – 12:00 PM
- Desired schedule: 9:00 AM – 12:00 PM

You must either:

- Delete the unwanted 8:00 AM – 9:00 AM slots
- Or delete all slots and recreate the schedule

Updating Slots

The **Update Slots** feature will allow you to update the characteristics of existing slots. This feature will allow you to:

- Change appointment types
- Increase or decrease the maximum appointments allowed per slot
- Hide slots from parents
- Make slots unavailable
- Convert in-person appointments to virtual appointments, or vice-versa

Note: The Update Slots feature does not change the start time, end time, or duration of existing slots.

Accessing Update Slots

1. Navigate to **Events / Preview** from the navigation menu.
2. Select your event from the list.
3. Click the **Appointments** tab.
4. Choose the appropriate date from the calendar on the left-hand side.
5. Select the teacher/resource name on the right-hand side.
6. Select the **Appointments** drop-down menu.
7. Select **Slots /Update Slots**.

This will open the **Slot Updater** dialog box.

The dialog box will allow you to enter a range of times. You will have several options for making changes to an existing slot.

The "Keep existing slot type on slots being updated" checkbox allows you to change the appointment type (i.e., from in-person to virtual) without changing the slot type. It is very helpful if all teachers have already blocked their schedules.

Update Slots will only change the characteristics of existing slots. It does **not** change the duration, start, or end time of existing slots.

Removing Slots - individual scheduling exceptions

The **Delete Time Slots** feature allows you to remove existing appointment slots for:

- Individual teachers
- Specific times
- Entire groups of teachers/resources

This is commonly used for:

- Lunch breaks
- Staff meetings
- Schedule changes
- Teacher absences
- Emergency closures

Accessing Delete Time Slots

1. Navigate to **Events / Preview** from the navigation menu.
2. Select your event from the list.
3. Click the **Appointments** tab.
4. Choose the appropriate date from the calendar on the left-hand side.
5. Select the teacher/resource name on the right-hand side.
6. Select the **Appointments** drop-down menu.
7. Select **Slots > Delete Time Slots**. This will open the deletion dialog box.
8. The dialog box will ask you for details on the deletion. Please read carefully to ensure that you are only deleting slots on the correct date/teacher/time combination.

You will be able to delete all slots that occur at that time for all teachers. For example, if you want to schedule a lunch break for all teachers, you could enter the start and end times of the lunch break and delete any slots during that time.

You can also create breaks by using the Update Slots feature.

IMPORTANT NOTE: If you are deleting slots with appointments on them, a second dialog box will come up.

This dialog box will provide you with several options for the appointments that are on your soon-to-be-deleted slots.

- You will have the option of not canceling the appointments. As the slots will be deleted, these appointments will be moved to the red Appointments List. From here, you will need to attend to these appointments by either deleting them from the red Appointments List or by recreating the appointment slot. This red Appointments List is a holding area for "problem" appointments.
- You will have the option of canceling the appointments and not sending a cancellation email.
- You will have the option to cancel the appointment and send a cancellation email. The cancellation email that you have set up in the Notification Setup section will display, and you will be able to edit this or send it as is.

Best Practices

- Use **Update Slots** for temporary availability changes whenever possible.
- Use **Delete Time Slots** only when appointment slots should be permanently removed.
- Review deletion settings carefully before confirming changes.
- If appointments already exist, determine whether parents should receive cancellation notifications before proceeding.

Blocking Slots

How to Block a Slot

1. Navigate to the **Appointments** page in the Admin UI.
2. Locate the appointment slot you would like to block.
3. Click the **X** in the corner of the slot.

The slot will:

- Turn red
- Display the message **Blocked**

You may leave the default message or replace it with a custom message, such as:

- Lunch Break
- Staff Meeting
- Unavailable

This slot will then not be displayed on the scheduling page to your parents. At any time, you can "unblock" the slot by clicking on the x in the corner and returning the slot to blue with the word Available listed in the slot. Blocked Slots will display on your reports when the "show all slots" option is checked.

As an alternative to blocking slots, you can always delete slots.

Blocking Slots vs. Deleting Slots

Blocking Slots

- Temporarily removes availability
- Preserves the original slot structure
- Can easily be reversed
- Recommended for short-term schedule changes

Deleting Slots

- Permanently removes the slot
- Requires recreating the slot later if needed
- Recommended for permanent schedule adjustments

In most cases, blocking slots is the preferred option for temporary scheduling changes.

Changing Slot Start Times, End Times, or Duration

If you need to modify:

- Slot start times
- Slot end times
- Appointment durations

You must first delete the existing slots before creating new ones.

The **Create Slots** feature does not overwrite or replace existing appointment slots.

Example

Existing Schedule:

- 10-minute slots
- 8:00 AM – 2:00 PM

New Desired Schedule:

- 10-minute slots
- 9:00 AM – 1:00 PM

You cannot simply create the new schedule on top of the existing slots.

Instead, you must either:

- Delete only the unwanted slots
 - 8:00 AM – 9:00 AM
 - 1:00 PM – 2:00 PM

OR

- Delete all existing slots
- Recreate the entire schedule using the new times

Best Practices

- Use **Blocking Slots** for temporary schedule changes.
- Use **Delete Time Slots** for permanent scheduling changes.
- Review existing appointments before deleting slots.
- Recreate slots only after unwanted slots have been removed.

Move Slots

The **Move Slots** feature will allow you to move all your slots and appointments (if any) to a new date.

This feature is commonly used when:

- A conference day changes
- A school closure occurs
- Teachers become unavailable
- Events need to be rescheduled

The Move Slots button will bring up a dialog box where you can enter a destination date for your slots and appointments to be moved to. You will have the option of sending an explanation email to all parents with an appointment. You also have the option to move the slots only for a selected teacher or teachers.

Accessing Move Slots

1. Navigate to **Events / Preview** from the navigation menu.
2. Select your event from the list.
3. Click the **Appointments** tab.
4. Choose the appropriate date from the calendar on the left-hand side.

5. Select the teacher/resource name on the right-hand side.
6. Select the **Appointments** drop-down menu.
7. Select **Slots > Move Slots**.

This will open the **Move Slots** dialog box.

In the Move Slots dialog box:

1. Select the destination date
2. Choose whether to:
 - Move slots for all teachers/resources
 - Move slots only for selected teachers/resources

3. Confirm the move

All selected slots and any associated appointments will be transferred to the new date.

When slots are moved:

- Existing appointments are transferred to the new date
- Parent scheduling information remains attached to the appointment
- Appointment times remain the same unless otherwise adjusted

Important Note: New calendar notification emails will **not** be sent, so participants should be advised to update any calendar entries they have set.

Parent Notification Options

If appointments already exist on the slots being moved, you will have the option to send an informational email to affected parents.

This email can be used to explain:

- Why the event was rescheduled
- The new appointment date
- Any additional instructions

Best Practices

- Send notification emails whenever appointments are moved.
- Clearly explain why appointments were rescheduled.
- Encourage parents to verify their updated appointment dates and times.
- Review the new schedule after moving slots to ensure all appointments transferred correctly.

Copy Slots

The Copy Slots feature will allow you to copy one day of slots to another day. You can also selectively copy slots from one teacher to another teacher.

The **Copy Slots** feature allows you to duplicate existing appointment slots from one date or teacher/resource to another.

This is useful when:

- Multiple conference days use the same schedule
- Teachers share identical availability
- You want to quickly recreate schedules without manually rebuilding slots

Common Uses for Copy Slots

Copy One Day to Another Day

Example: Copy Monday's conference schedule to Tuesday

Copy Slots Between Teachers

Example: Copy one teacher's availability setup to another teacher/resource

Reuse Standard Scheduling Templates

Example: Recreate standard office hours or conference blocks across multiple days

Accessing Copy Slots

1. Navigate to **Events / Preview** from the navigation menu.
2. Select your event from the list.
3. Click the **Appointments** tab.
4. Choose the appropriate date from the calendar on the left-hand side.
5. Select the teacher/resource name on the right-hand side.
6. Select the **Appointments** drop-down menu.
7. Select **Slots > Copy Slots**

This will open the **Copy Slots** dialog box.

Copying Slots

In the Copy Slots dialog box:

1. Select the destination date
2. Optionally select destination teacher/resource(s)
3. Confirm the copy action

The selected slots will be duplicated to the new location.

Important Notes

- Copy Slots duplicates the slot structure and settings.

- Existing appointments are not copied.
- Slot visibility, appointment type, and availability settings are preserved during the copy process.

Best Practices

- Use Copy Slots to save time when building large schedules.
 - Verify copied schedules after completion.
 - Review teacher/resource selections carefully before copying slots.
 - Use Move Slots instead of Copy Slots when appointments must also transfer to a new date.
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FAQ on Creating Slots

I created slots on the wrong date

On the Appointments page, select the Slots drop-down and then select the Move Slots option. This will allow you to move all slots (and any appointments) to a new date. You will have the option to send an email to any appointment holder whose appointment was moved.

My slots are 20 minutes in duration, but I wanted a 30-minute break for lunch

If your break will not have the same duration as your slots or is not a multiple of your slots (e.g. you have time slots of 20 minutes, and you want a 40-minute break), you will need to create your slots in sections. First, create the slots BEFORE your break time, and then create your slots AFTER your break time.

Why are some of my slots grey?

Grey time slots indicate that the teacher is booked elsewhere and is not available at that time. Either the teacher is having meetings as part of a team, or the teacher has booked her own appointments in her role as a parent. If you click on the grey time slot, a message will display telling you where the teacher is booked.

Why are my time slots yellow?

Yellow indicates that the time has passed.

I created time slots with the wrong duration, but my parents have already booked appointments.

Time slots can not be changed from one duration to another. If you need a different duration than what you originally created, you will need to delete your time slots with the incorrect duration and create new time slots with the correct duration. When you delete the time slots, the system will ask you what you want to do with the appointments. You can cancel them and send an email to each customer requesting that they rebook their appointment. Or you can put the appointments "on

hold" and then cancel and manually rebook each appointment.

After selecting the **Delete Time Slots** option, you will see a new dialog box telling you the number of appointments on your soon-to-be-deleted slots:

The default option is set to move the appointments to a holding area on the Appointments List page. If you choose this option, you will have a list of the appointments that you need to either cancel or cancel and rebook.

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I created time slots with the wrong duration, but my customers have already booked appointments.

Time slots can not be changed from one duration to another. If you need a different duration than what you originally created, you will need to delete your time slots with the incorrect duration and

create new time slots with the correct duration. When you delete the time slots, the system will ask you what you want to do with the appointments. You can cancel them and send an email to each customer requesting that they rebook their appointment. Or you can put the appointments "to the red list" and then cancel and manually rebook each appointment.

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The default option is set to move the appointments to a holding area on the Appointments List page. If you choose this option, you will have a list of the appointments that you need to either cancel or cancel and rebook.

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