

STEP FOUR: Adjust Settings

UI Setup

Event Settings

On the [UI Setup \(Events Management, Settings/UI Setup\)](#) page, you can adjust various settings specific to your event.

1. From the Admin UI on the [Events/Preview](#) page, select your event. Click on the Go To Event button to open the **Event Management** page.
2. Select the **Settings** tab and then the **UI Setup** tab.

From the top of the page, work your way down

Scheduler Availability

- **Open scheduler to customers on** - Enter the date and time that you would like the scheduler to open to your participants.
- **Close scheduler to customers on** - Enter the date and time that you would like the scheduler to close to your participants..

Appointment Number Limits

- **Maximum Appointments per Event** - This allows you to limit the number of allowed appointments per event.
- **Maximum Appointments Per Resource per Day** - Allows you to set a limit of how many appointments per resource can be booked on any day. For example, you can create 15 slots on a day, but set this to 10. As soon as the 10th appointment is booked at any time on that day, no more appointments can be booked.
- **Duration between appointments** - This allows you to set a duration between allowed booked appointments.

Appointment Cancellations

- **Customer cannot cancel their appointment closer than x hours/days/weeks** - If you want to prevent participants from canceling their appointment within some amount of time before the appointment, alter this setting. Set this to 0 if you don't care if participants cancel a minute before they show up. Set this to a large value if you don't want them to be able to cancel the appointment. **NOTE:** Closing your scheduler does not prevent participants from canceling an appointment.

Close Appointment Booking

- **Close Appointment Booking** - Allows you to make slots become unavailable some amount of time before the appointment. There are 3 options.
 - Close appointment booking at XX time XX days before the appointment date.
 - Close appointment booking XX hours/days/weeks/months before the appointment time.
 - Close appointment booking XX hours before the first appointment time of the day.

Scheduler Settings

Scheduling Link

The Scheduling link for the selected event lists the site address for the selected event that you can either use on your school web page or provide to participants in an email to use when booking an appointment. If you click on this link, a new browser window will open up that is the Customer User Interface (CUI) for your event. You can also enter a customized event name. This will then be appended to your account URL. For example, if you have customized your event URL to <https://pickatime.com/SmartFluShots>, your custom event URL might look something like this: <https://pickatime.com/SmartFluShots/Rochester> or <https://pickatime.com/SmartFluShots/Brighton>. Note that when using the custom event URLs, the participant will still have the option to toggle to any other open event on the account.

IMPORTANT NOTE: The event URL you see listed on this page will take the customer directly to the event. However, if you have any other open events on your account, the event table will be displayed to the customer, and they will be able to toggle to the other events. You can use the Category Option if you want to direct a participant to a certain event without an option to toggle to the other open event on the account.

The Scheduling link for the category would display a scheduler for the event(s) that fall in the category.

Scheduler Display

- You have multiple options for displaying the scheduler. The options are Table, Text, Vertical, List, and Date.
- **Display in a Condensed/Expanded mode** - pickAtime offers both **Condensed** and **Expanded** scheduler views, so users can choose the experience that works best for their scheduling style and screen space.
 - **Condensed View** - Best for users who want to see more availability with less scrolling. The Condensed view uses variable time steps, creating a cleaner and more compact layout. This option is helpful for smaller screens or users who want to quickly browse open times without focusing on exact interval spacing.
 - **Expanded View** - Best for users who prefer a traditional scheduling layout with fixed time increments. Expanded view displays fixed time slots in

consistent intervals, making it easier to visually search for appointments of a specific length or compare gaps between appointments. This view closely matches the classic scheduler experience and can be preferred by long-time users familiar with the original CUI.

Users can switch between views at any time using the toggle button located in the top-left corner of the scheduler.

- Display multiple dates with a **Paginator** or a **Calendar**. The **Paginator** option will allow the parent to see multiple dates on the same page. The **Calendar** option will display one day at a time to the parent, with a small calendar displayed where the parent can select a different date.
- Display the end time of each appointment slot. This option will not be shown if the Table or List display is selected.
- Display the number of available appointments per slot. This option will not be shown if the Table or List display is selected.

Scheduler Display Limits

- **Display X weeks of slots, xxx slots on the scheduling page** - This setting determines how many days or weeks are shown on the Customer User Interface at one time.
- **Do not display after xx days/months from today** - This allows you to have appointments available on the back-end, but not yet display them on the booking page.
- **Display maximum x available appointments(s) per slot and show the next only when xx% of them are booked** - The xx slots section determines how many slots (per day) are displayed. For example, if you have 20 slots available on a day, but you want the first 10 time slots to fill up first, you would enter 10 here. The first 10 time slots of the day would be displayed (ex. 9:00, 9:10, 9:20... through 10:30). Once a participant booked one of these slots, the next slot in the sequence (10:40) would open up and be displayed on the scheduler. Note that the number you enter as a limited number is for the number of time slots. If you are allowing multiple appointments per slot, for example, 2 appointments per slot, and you enter 10 as your limited number, the system will display the first 10 appointment times.

Resource Display

- **Hide resources on the CUI** - If you have multiple resources, and it is not relevant to the participant which resource they book with, you may choose to “hide” the display of the resource name. Not available when using the Table or Date display format.
- **Show resources on the CUI** - Not available when using the Table or Date display format.
- **Display resources with buttons / vertically / in a pull-down** - Not available when using the Table or Date display format.
- **Resource title:** here you can provide a name for your resources - e.g. Nurse.
- **Display resource description** - If you have created a description for your resource, it will display here.

- **Display rooms** - If you have specific rooms for your resources, you can display them on the scheduling page.

Miscellaneous

- **Require parents to select their student's name from a drop-down when booking an appointment (requires that students have been imported to the account)** - This is used when you want a participant parent to attach a pre-imported student to their account.
- **Allow customers to select a timezone from a list of allowed time zones**

Advanced Settings

Online Meeting Provider

- **Use 'X' for online meetings** - Select from the drop-down menu which Online Meeting Provider you want to use for this event.

Multiple Appointment Booking

- **Allow a customer to take multiple slots** - This allows a participant to book more than one appointment at the same time.
- **Allow a customer to make conflicting appointments for themselves** - If this box is checked, the participant will be able to make more than one appointment at the same time, across different resources.

Appointment Changes

- **Allow customers to see and cancel past appointments** - Check this box to allow your customers to see and cancel past appointments.
- **Don't allow customers to change appointment time** - Check this if you do not want the participant to have the option to change the time of their appointment.

Notification Setup

The [Notification tab](#) in the Settings section allows you to toggle between the following options: **Confirmation Email / Cancellation Email / Reminder Email / Custom Email / Follow-up Email / Resource Notification Email / Calendar Event Notification.**

Confirmation Email

- **Subject** - Allows you to change the text in the subject line of the email.
- **Header** - Allows you to change the text in the header line of the email.
- **Body** - Allows you to change the text in the body of the email.

- **Send Confirmation and Cancellation Emails** - Check this box if you would like a confirmation email sent after the appointment is made. This is generally left unchecked for schools.
- **Support Email** - Enter an email address in this box, and you will receive a reply when your customer selects "reply" in the confirmation, reminder, or cancellation emails. If you leave this blank, any replies will receive an automated email response directing them to contact the scheduling organization.

Reminder Emails

Send Reminder Emails

- **Select Add and enter the time (in hours)** - prior to the appointment for which you would like an email reminder to be sent. You can add multiple times. The duplicated values are not allowed and would be removed automatically.
- **Footer** - Allows you to change the text in the footer of the email.
- **Subject for combined email** - When a combination email will be sent, for example, when an appointment is canceled and immediately rescheduled, the text here will be in the subject line of the combined email.

Configure CUI

The pickAtime system allows you to customize many of the display settings that your participants will see when booking appointments.

To modify the **CUI messages**:

1. From the **Admin UI**, select the [Events / Preview](#) option on the dashboard. Then select your event from the list and click on the Go To button.
2. Select the **Settings** tab and then the **CUI messages** tab.
3. On the left-hand side, you see many different labels that you can optionally modify. When you select a label, the right-hand side will display the text that will show up on the CUI. The text on any of these labels can be changed.
4. To edit the title on the login page for your scheduler, select **Sign In page / Welcome message*** and edit the text on the right-hand side.
5. To add a logo to your scheduler, go to the [Global Setup / Business page](#). Under the **Account Level Settings / Account Logo**, click on the Upload icon to upload your logo.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

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