Event Setup

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STEP ONE: Create Event

Steps to Create a New Event

1. Select **Events / Preview** from the sidebar.
2. Click the green **Add** button.
3. Enter a name for your event — e.g., `Health Screenings, Photo School 2026`.
4. Select the event type: **Normal**.
5. Select your event's **time zone**.
6. *(Optional)* Add a **Date** and **Location**.

Once saved, your event will appear as a new row in the Events list.

About the Date and Location Fields

These fields are optional and primarily used to **distinguish between multiple events** when more than one is listed.

- The **Date** field is just a label — if your event spans multiple dates, you can list them all here, or leave it blank.
- You do **not** need to create a separate event for each date — a single event can include any number of dates.

Adding Event Details

Use the **Event Details** box to add event-specific information you'd like to display on the scheduler or include in emails.

Anything entered here becomes available as a macro: `$(E_DESCRIPTION)`

You can insert this macro into your **CUI Messages** or **Notification Setup** templates to automatically pull in this text.

STEP TWO: Add a Resource

Defining Your Resources

Every event requires at least one **Resource** — the "container" that holds your time slots.

Step 1: Name the Resource

Click directly into the **Title Area** of a new resource to edit its name.

Step 2: Choose a Descriptive Name

Use a name specific to your event type:

Event Type	Example Resource Name
Health Clinics	"Flu Shots" (service name)
Counseling/Advising	"Sarah Jenkins" (staff member's name)
Facility Rentals	"Main Gymnasium" (room or equipment name)

Step 3: Add Additional Resources

If your event involves multiple staff members, rooms, or service types, continue adding resources as needed. **Each resource manages its own independent set of appointments.**

STEP THREE: Create Slots

To get started, go to **Events / Preview**, select your event, then click the **Appointments** tab. From the left-hand calendar, select the date you want to work with. Open the **Slots** drop-down and choose **Create Slots**.

Step 1: Choose Which Resources to Create Slots For

In the slot generator, choose to create slots for **selected resources** or **all resources**. To select multiple resources, hold **Ctrl** while clicking names in the right-hand panel.

Step 2: Set Your Time and Duration

Field	Description
From	Start time of the first slot
To	End time of the last slot
Duration	Length of each appointment (in minutes)
Travel Break	Optional gap between appointments

Example: 10-minute slots with a 5-minute travel break create slots at 8:00–8:10, 8:15–8:25, 8:30–8:40, and so on.

> **Note:** If you need a break that doesn't align with your slot duration (e.g., 20-minute slots but a 40-minute lunch break), create slots in **two batches** — one before the break, one after.

Step 3: Choose Appointment Type

Type	Description	Indicator
In-Person	Participants receive room/location info	P
Virtual	Participants receive a meeting link	V
In-Person or Virtual	Participants choose their preferred format	PV

Step 4: Set Slot Visibility

Option	What it does
Visible for Customer	Available for online booking

Option	What it does
Hidden from Customer	Hidden from participants; visible in Admin UI only
Shown with "Call" Status	Visible to participants, but they're prompted to call the school to book
Make Unavailable	Visible in Admin UI but not bookable online (use for lunch breaks, meetings, etc.)

You can optionally add a custom message for unavailable slots.

Step 5: Set Maximum Appointments Per Slot *(Optional)*

Use this for group sessions, open labs, or any scenario where multiple participants/families can book the same time slot.

Creating Slots for Multiple Days or Resources

Scenario	What to do
Same schedule across multiple days	Enable **Multiple Dates** and select all applicable dates before saving
Different schedule per day	Create slots for the first day, switch to the next date, and repeat
Different schedules per resource	Select a resource (or group), create their slots, save, then repeat for the next resource/group

> **Tip:** If you created identical slots for all resources at once, individual slots won't display until you click a specific resource's name in the right-hand pane

Updating Existing Slots

Use **Update Slots** to change existing slot characteristics without deleting and recreating them.

To access: Appointments → select date/resource → Slots → Update Slots

You can update:

- Appointment type (e.g., switch from in-person to virtual)
- Maximum appointments per slot
- Slot visibility (hidden, unavailable, etc.)

> **Important:** Update Slots does **not** change start times, end times, or duration. To change those, you must delete and recreate the slots (see *Changing Slot Duration or Times* below).

"Keep existing slot type on slots being updated" — useful when resources have already blocked parts of their schedule, since it lets you change appointment type without affecting slot type.

Blocking Slots

Blocking is the preferred way to **temporarily** remove availability without permanently deleting a slot.

1. Go to the **Appointments** page and click the **X** in the corner of the slot.
2. The slot turns **red** and displays "Blocked." You can enter a custom message (e.g., "Lunch Break" or "Staff Meeting").
3. To unblock, click the **X** again to restore availability.

> Blocked slots appear on reports when **Show All Slots** is enabled.

Deleting Slots

Use **Delete Time Slots** to permanently remove slots.

To access: Appointments → select date/resource → Slots → Delete Time Slots

If appointments already exist on those slots, you'll be prompted to choose:

- **Move appointments** to the red Appointments List (a holding area for manual rebooking or cancellation)
- **Cancel appointments** without sending a notification
- **Cancel appointments** and send a cancellation email

> **Tip:** Consider whether participants need a cancellation notification before confirming any deletion.

Moving Slots

Use **Move Slots** to transfer an entire day's slots — and any existing appointments — to a new date. Useful for snow closures, rescheduled days, or resource availability changes.

To access: Appointments → select date/resource → Slots → Move Slots

In the dialog, select the destination date, choose whether to move slots for all resources or selected resources, and confirm.

Existing appointments transfer with all participant information intact, and appointment **times remain the same**.

> **Important:** Calendar notification emails are **not** sent automatically — advise participants to update any calendar entries they've saved. You can send a custom notification email explaining the change.

Copying Slots

Use **Copy Slots** to duplicate a day's slot *structure* to another date or resource — **without** copying existing appointments.

To access: Appointments → select date/resource → Slots → Copy Slots

Select the destination date and/or resource(s) and confirm. Slot visibility, appointment type, and availability settings are all preserved.

> If you also need appointments to transfer, use **Move Slots** instead.

Changing Slot Duration or Times

Slot start times, end times, and duration **cannot be edited in place**. To change any of these:

1. Delete the slots you want to change (or all slots for that day).
2. Recreate them with the correct settings.

Example: If you have 10-minute slots from 8:00 AM–2:00 PM but want 9:00 AM–1:00 PM instead, delete the 8:00–9:00 AM and 1:00–2:00 PM slots (or delete all and start fresh), then create the new schedule.

Quick Reference: Which Tool to Use?

Situation	Use
Temporarily remove availability	**Block Slots**
Permanently remove slots	**Delete Time Slots**
Change appointment type or visibility	**Update Slots**
Reschedule an entire day	**Move Slots**
Duplicate a schedule to another day or resource	**Copy Slots**
Change slot duration or times	**Delete + Recreate**

Slot Color Guide

Color	Meaning
◫ Blue	Available
◫ Red	Blocked
∘ Grey	Resource is booked elsewhere (team meeting or personal appointment)
🟡 Yellow	Time has passed

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 my time slots yellow?

Yellow indicates that the time has passed.

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 "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.

STEP FOUR: Adjust Settings

Event Settings (UI Setup)

The **UI Setup** 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 / UI Setup**.

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

Scheduler Availability

Setting	What it does
Open scheduler to customers on	Date/time the scheduler opens to participants
Close scheduler to customers on	Date/time the scheduler closes to participants

Appointment Number Limits

Setting	What it does
Maximum Appointments per Event	Caps total appointments allowed for the entire event
Maximum Appointments Per Resource per Day	Caps appointments per resource, per day — e.g., you can create 15 slots but cap bookings at 10; once the 10th is booked, no more can be made that day
Duration Between Appointments	Sets a required gap between a participant's booked appointments

Appointment Cancellations

Customer cannot cancel their appointment closer than X hours/days/weeks. Restricts how close to the appointment time a participant 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.

Close Appointment Booking

Controls when slots become unavailable for **new bookings**, ahead of the appointment time. Choose one of three methods:

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

Scheduler Settings

Scheduling Link

Your event's **Scheduling Link** is the URL you share with participants (on your website or via email) to access the booking page (CUI). You can customise it with an event-specific suffix — for example: `https://pickatime.com/SmartFluShots/Rochester` or `https://pickatime.com/SmartFluShots/Brighton`

> **Important:** Even with a custom event link, participants will see a toggle to switch to any other **open** events on your account. To restrict participants to a single event with no toggle option, use the **Category** link instead, which scopes the scheduler to only the event(s) in that category.

Scheduler Display

Display format: Choose from **Table**, **Text**, **Vertical**, **List**, or **Date**.

View mode:

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

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

Date display mode:

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

Additional display options:

- **Display the end time of each appointment slot** — *(unavailable with Table or List display)*
- **Display the number of available appointments per slot** — *(unavailable with Table or List display)*

Scheduler Display Limits

Setting	What it does
Display X weeks of slots / XXX slots on the scheduling page	Controls how many days/weeks of slots are shown at once in the CUI
Do not display after XX days/months from today	Lets you have appointments available on the back end without showing them on the booking page yet
Display maximum X available appointment(s) per slot, show next only when XX% are booked	Controls how many time slots per day are initially shown, releasing more as earlier ones fill up — see example below

> **Example:** If you have 20 slots available in a day but want only the first 10 to show initially, enter **10**. The first 10 times (e.g., 9:00–10:30) display first; once one is booked, the next slot in sequence (10:40) becomes visible. *(Note: this limit counts **time slots**, not total appointments — if you allow 2 appointments per slot and set this to 10, the system still shows the first 10 time slots, not 10 total bookings.)*

Resource Display

> Note: These options are unavailable when using the Table or Date display format.

Setting	What it does
Hide resources on the CUI	Hides resource names — useful when it doesn't matter which resource a participant books with
Show resources on the CUI	Displays resource names
Display resources with buttons / vertically / in a pull-down	Controls how resource options are presented
Resource Title	Custom label for your resources (e.g., "Nurse")
Display resource description	Shows a resource's description, if one has been added
Display rooms	Shows assigned room numbers, if applicable

Miscellaneous

Setting	What it does
Require parents to select their student's name from a drop-down when booking	Requires linking a pre-imported student to the booking *(requires students to already be imported)*
Allow customers to select a timezone from a list of allowed time zones	Lets participants choose their own display timezone

Advanced Settings

Online Meeting Provider

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

Multiple Appointment Booking

Setting	What it does
Allow a customer to take multiple slots	Lets a participant book more than one appointment in a single session
Allow a customer to make conflicting appointments for themselves	Lets a participant book overlapping appointments across **different resources** at the same time

Appointment Changes

Setting	What it does
Allow customers to see and cancel past appointments	Lets participants view/cancel appointments that have already passed
Don't allow customers to change appointment time	Prevents participants from rescheduling once booked

Notification Setup

The **Notifications** 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

Field	What it controls
Send Confirmation and Cancellation Emails	Sends a confirmation after booking *(typically left unchecked for schools)*
Support Email	Address that receives replies to confirmation/reminder/cancellation emails. If left blank, replies get an automated response directing them to contact your organisation.

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.

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)

Configure CUI (Customer User Interface)

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

To edit CUI messages:

1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To**.
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.

STEP FIVE: Try it out

1. ## 1. Open the Scheduler

   1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To Event**.
   2. Select **Settings / UI Setup**.
   3. Set **"Open scheduler to customers on"** and **"Close scheduler to customers on"** to define the window during which participants can book appointments.

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2. View the Scheduler

1. Go to **Global Setup / Business / Account Level Settings / Account URL**, and find your **Account URL** at the bottom of the page.
2. Click the URL, or copy it into another browser window to test the scheduler as a participant would experience it.

   > You can customize this URL by checking **"Set Custom URL"** and entering your preferred name. The updated URL will be live in approximately **5–10 minutes**.