STEP FOUR: Adjust Settings

Online Scheduler Settings (Event Scheduling)

Booking Settings

Booking Window

Booking Opens	Select the date and time you would like the scheduler to open for participants.
Booking Closes	Select the date and time the scheduler should close and no longer accept bookings.
Admins can access the scheduler at any time	Check this to ensure Administrators can access the scheduler even when it is closed to the public.

For schedulers with multiple booking dates, close booking:

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

Booking Limits:

Maximum per Event	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
Maximum Per Child	Sets a cap on the number of appointments allowed for each individual student. Set to 0 for no limits.

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 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.

Cancellation Policy

Customer may cancel their appointment up to **XX 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.

Share Your Scheduler

Scheduling Link

Account Scheduling Link	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.
Event Scheduling Link	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.

Display Settings

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 to display of multiple dates with slots on one page.
Shows end times	Displays the end time of the slot.
Show Number of Available Openings	Show the number of appointment slots for the appointment time.
Display X weeks/days of slots on the scheduling page with a max capacity of XXX slots per day	Determines the volume of days or weeks visible to the customer at one time.
Display X days of time slots	Enter a value here if you would like to display only a certain number of days/weeks/months to your customer.
Limit visible openings to x per slot and reveal the next available slot when xx% of slots 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

Hide resources on the Scheduling Page	When using the Text, Vertical, or List displays, these options appear to allow you to show or hide the resources for your participants.
Resource selection format (only active if the resources are NOT hidden):	When using the Text, Vertical, or List displays, you can opt to show the resources in a drop-down, vertically or as buttons.
Custom label for Resource	Create a custom label for Resource
Display resource description	When using the Table or Date display, you can add the description to the resource's legend on the CUI.
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.

ADVANCED SETTINGS

Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
Multiple Appointment Booking	
Allow customers to take multiple slots	This allows your customer to book more than one slot per appointment time.
Allow overlapping appointments	Enables customers to book multiple appointments that occur at the same time.
Appointment Changes	
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.
Appointment Limit for Resources: A resource is whoever or whatever holds the slots - staff, a room, or any entity you choose.	
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.
Student Selection	Require parents to select their student's name from a dropdown menu. (Note: This requires student data to be imported first.)
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.

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

Field	What it controls
Body	Main email text
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.

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