

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

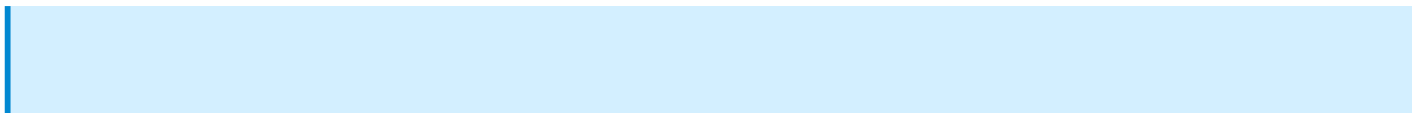
Appointment Number Limits

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

Mode	Behavior
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

Setting	What it does
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 (<i>requires students to already be imported</i>)
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
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 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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