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.

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