

STEP FIVE: Try it Out

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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.
3. To turn on the online scheduler so parents can use the website and schedule appointments, modify the "**Open scheduler to customers on**" and the "**Close scheduler to customers on**". Any days that you want to make available for parents to schedule appointments should be within the start and end date specified.

To allow yourself (and other Administrators) access to the scheduler when it is closed to your parents, check the box "*allow Admins access to the CUI at all times*".

Finalsite Single Sign On Schools

Follow the link as directed to you by Finalsite in viewing the scheduler.

All other Schools

View for yourself the appointment booking web page. The appointment URL is listed in the Account URL section at the bottom of the **Global Setup / Business Setup** page. To test out the system, you can click on the URL or copy and paste this URL into another browser window and try out the site as if you were a customer. You can customize this URL by checking the box "Set custom URL" and entering in your preferred URL name in the white box.

The "**Appointment URL**" will change to reflect your selection, and the new URL will be available in approximately 5-10 minutes.

You can confirm the appointment procedure by adding a student to your account and booking an appointment. To add a student to your account, you would need to enter the **StudentID** and **SecurityValue**. You will then see the list of all available appointment slots for that student. If you want to remove yourself as the child's parent, you can do so by clicking the X next to the student's name on the CUI. You can attach any student to your account; it will not prevent the "real" parent from doing so as well.

IMPORTANT NOTE: If you have checked the box "Use First + Last Name as StudentID" in the **Parent Login** section of the **Global Setup / Business Setup** page, then be sure you are entering the student's first name + last name as the first prompt.

If you receive an error message "*Failed to find student*", check the values that you have entered in the CUI with the values for that student that are in the Contacts section of the Admin UI.

If you don't see the student's teachers listed, several things could be wrong. Check the student's enrollment information and make sure you have slots for the teachers at the PTA event.

Additional Checks

Is the URL that I've provided to my parents correct?

You can confirm your link by going to the Global Setup / Business Setup page of the Admin UI. Under the "Setting Appointment URL for customers, you will see the unique scheduling link for your school. Here you also have the option to customize your link.

Is my slot duration correct?

The duration of your time slots can not be changed. If your slot duration is incorrect, you need to delete the incorrect slots and create slots with the correct duration.

For example, if your parents start booking appointments every 15 minutes, and you then discover that you need 10-minute slots, you will need to delete the 15-minute slots and cancel the appointments. Then you will be able to create slots with a duration of 10 minutes.

How do I test the scheduler and follow the directions on "adopting" a student?

Click on your scheduling link and add any student at the school to your account. This will not prevent the "real" parent from booking appointments.

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