

STEP FOUR: Adjust Settings

UI Setup

Event Settings

On the UI Setup (Events Management, Settings/UI Setup) page, you can adjust various settings specific to your event.

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.

From the top of the page, work your way down

Scheduler Availability

- Open the scheduler for customers. Enter the date and time that you would like the scheduler to open for your parents.
- Close the scheduler to customers. Enter the date and time that you would like the scheduler to close for your parents.
- Check the box *allow Admins access* to the CUI at all times to allow Administrators access to the parent scheduling page when the scheduler is not open to your parents. When this box is checked, when you log into the Online Scheduler, you will see a page that says that the event is closed to parents but not to admins.

Appointment Number Limits

- **Maximum Appointments per Event.** - This allows you to limit the number of allowed appointments per event.
- **Maximum Appointments Per Resource per Day.** - Allows you to set a limit on how many appointments per resource can be booked on any day. For example, you can create 15 slots on a day, but set this to 10. As soon as the 10th appointment is booked at any time on that day, no more appointments can be booked.
- **Maximum Appointments Per Child.** - This allows you to set a limit on the number of appointments per child that the parent can book.
- **One appointment per teacher per student (regardless of the number of classes that have that teacher)** - If this box is checked, then the parent will only be able to schedule one appointment with the same teacher, even if their student has more than one class with that teacher.

- **One appointment per class (regardless of the number of students enrolled in the class)** - If this box is checked, then the parent will only be able to schedule one appointment for the same class, even if they have multiple students enrolled in the same class.
- **Allow back-to-back** - If the "allow back-to-back" is not checked, the system will not allow a parent to make an appointment immediately following their previous appointment unless the two appointments are with the same teacher. This setting is used to prevent parents from making appointments with two teachers one after the other, so that parents will have time to travel from one appointment to the next. The system allows back-to-back appointments when the two appointments are with the same teacher, regardless of this setting. It will also allow back-to-back appointments when travel breaks have been added.

Appointment Cancellations

- Customer cannot cancel their appointment closer than x hours/days/weeks. If you want to prevent participants from canceling their appointment within some amount of time before the appointment, alter this setting. Set this to 0 if you don't care if participants cancel a minute before they show up. Set this to a large value if you don't want them to be able to cancel the appointment. **NOTE:** closing your scheduler does not prevent participants from canceling an appointment.

Close Appointment Booking

- **Close Appointment Booking** allows you to make slots unavailable some amount of time before the appointment. There are 3 options.
 1. Close appointment booking at XX time XX days before the appointment date.
 2. Close appointment booking XX hours/days/weeks/months before the appointment time.
 3. Close appointment booking XX hours before the first appointment time of the day.

Scheduler Settings

Scheduling Link

The Scheduling link for the selected event lists the site address for the selected event that you can either use on your school web page or provide to participants in an email to use when booking an appointment. If you click on this link, a new browser window will open up that is the Customer User Interface (CUI) for your event. You can also enter a customized event name. This will then be appended to your account URL. For example, if you have customized your event URL to <https://pickatime.com/HowardSchool>, your custom event URL might look something like this: <https://pickatime.com/HowardSchool/LS> or <https://pickatime.com/HowardSchool/US>. Note that when using the custom event URL's, the participant will still have the option to toggle to any other open event on the account.

IMPORTANT NOTE: The event URL you see listed on this page will take the customer directly to the event. However, if you have any other open events on your account, the event table will be displayed to the customer, and they will be able to toggle to the other events. You can use the Category Option if you want to direct a parent to a certain event without an option to toggle to the other opened event on the account.

The Scheduling link for the category would display a scheduler for the event(s) that fall in the category.

Scheduler Display

- **Display in a Condensed/Expanded mode** - pickAtime offers both **Condensed** and **Expanded** scheduler views, so users can choose the experience that works best for their scheduling style and screen space.
 - **Condensed View** - Best for users who want to see more availability with less scrolling. The Condensed view uses variable time steps, creating a cleaner and more compact layout. This option is helpful for smaller screens or users who want to quickly browse open times without focusing on exact interval spacing.
 - **Expanded View** - Best for users who prefer a traditional scheduling layout with fixed time increments. Expanded view displays fixed time slots in consistent intervals, making it easier to visually search for appointments of a specific length or compare gaps between appointments. This view closely matches the classic scheduler experience and can be preferred by long-time users familiar with the original CUI.

Users can switch between views at any time using the toggle button located in the top-left corner of the scheduler.

- Display multiple dates with a **Paginator** or a **Calendar**. The **Paginator** option will allow the parent to see multiple dates on the same page. The **Calendar** option will display one day at a time to the parent, with a small calendar displayed where the parent can select a different date.

Scheduler Display Limits

- **Display X weeks of slots xxx slots on the scheduling page.** This setting determines how many days or weeks are shown on the Customer User Interface at one time. This only applies if Paginator was selected under the Scheduler Display.

Teacher Display

- **Display resource description.** If you have added a description to the Resource Name, then it will be displayed on the parent scheduling page. This displays when the small info icon above the teacher's name is clicked.
- **Display rooms** will show the room on the parent scheduling page.
- **Separate legend for each child (Regular PTA only).** Allows you to have the option of a separate legend per child.
- **Display class names.** If you have added Class Names to the Appointments page, then checking this box will show the class names on the parent scheduling page. This displays

when the small info icon above the teacher's name is clicked.

Teacher's Group Name

- **Sort by Group Name** -This section allows you to group your teachers. For example, you might want to group all your Lower School teachers together, and then have a grouping for Middle or Upper School teachers. Enter your group names in this section, then go to the **Appointments** page on the right hand side you can see the list of teachers, there is the Group Name column you can select a category from the drop-down, so would assign each teacher to a Group.

Advanced Settings

Online Meeting Provider

- **Use 'X' for online meetings** - Select from the drop-down menu which Online Meeting Provider you want to use for this event.

Multiple Appointment Booking

- **Allow a parent to make conflicting appointments for themselves** - If this box is checked, the parent will be able to make more than one appointment at the same time.

Appointment Changes

- **Allow customers to see and cancel past appointments** - Check this box to allow your customers to see and cancel past appointments
- **Don't allow customers to change appointment time** - Check this if you do not want the participant to have the option to change the time of their appointment.

Notification Setup

The Notification tab in the Settings section allows you to toggle between the following options: **Confirmation Email / Cancellation Email / Reminder Email / Custom Email / Follow-up Email / Resource Notification Email / Calendar Event Notification.**

Confirmation Email

Subject - Allows you to change the text in the subject line of the email.

Header - Allows you to change the text in the header line of the email.

Body - Allows you to change the text in the body of the email.

Send Confirmation and Cancellation Emails - Check this box if you would like a confirmation email sent after the appointment is made. This is generally left unchecked for schools.

Support Email - Enter an email address in this box, and you will receive a reply when your customer selects "reply" in the confirmation, reminder, or cancellation emails. If you leave this blank, any replies will receive an automated email response directing them to contact the scheduling organization.

Replace the Email Body with the Printable Schedule - the recommended option is to check this box. Then your parent will receive an email with a table of their appointment schedule, instead of an individual email for each appointment.

Reminder Emails

Send Reminder Emails

Select Add and enter the time (in hours) prior to the appointment for which you would like an email reminder to be sent. You can add multiple times. The duplicated values are not allowed and will be removed automatically.

There are two ways reminder emails are sent:

- If the '**Replace the Email Body with the Printable Schedule of Appointments**' option is turned on, all your appointments will be grouped into one reminder email, sent a set number of hours before your first scheduled appointment. If you have appointments on multiple days, you will get a reminder email each day, listing all your upcoming appointments. For example, if reminders are set for 24 hours and 12 hours before the appointment time, you'll get two reminder emails, 24 and 12 hours before your first scheduled appointment.
- If the '**Replace the Email Body with the Printable Schedule of Appointments**' option is turned off, you will get one reminder email for all appointments booked within the same hour. For example, if you have appointments at 9:00 AM, 9:15 AM, and 9:30 AM, they will be grouped into one reminder email. If you book more appointments at 10:15 AM and 10:30 AM, you will get two separate reminder emails: one for the 9:00 AM, 9:15 AM, and 9:30 AM appointments, and another for the 10:15 AM and 10:30 AM appointments.

Footer - Allows you to change the text in the footer of the email.

Subject for combined email - When a combination email will be sent, for example, when an appointment is canceled and immediately rescheduled, the text here will be in the subject line of the combined email.

Recommended Option.

On the Confirmation and Reminder emails, you have the option to insert the printable schedule or appointments as the body of the email. The printable schedule or appointments is a table that summarizes all the appointments a parent has booked. To include this option, check the box

"Replace the Email Body with the Printable Schedule or Appointments" box. When you check this box, your email will contain the Header text, the printable schedule, and the Footer text. See the CUI Messages / Print Schedule section for the formatting of the printable schedule.

The format of the table of appointments that is included is referred to as the printable schedule, as this table will be the same as the table a parent would see if they clicked on the Printable Schedule link on the parent scheduling page. The information included in this table is set on the Settings /CUI Messages page under the Print Schedule section.

When the "printable schedule or appointments" option is selected, one email will be sent containing the schedule of appointments made by the parent. The parent will not receive one email per appointment booked.

Configure CUI

The pickAtime system allows you to customize many of the display settings that your parents will see when booking appointments.

To modify the **CUI messages**:

- From the **Admin UI**, select the **Events / Preview** option on the dashboard. Then select your event from the list and click on the **Go To Event** button.
- Select the **Settings** tab and then the **CUI messages** tab.
- On the left-hand side, you see many different labels that you can optionally modify. When you select a label, the right-hand side will display the text that will show up on the CUI. The text on any of these labels can be changed.
- To edit the title on the login page for your scheduler, select **Sign In page / Welcome message*** and edit the text on the right-hand side.
- To add a logo to your scheduler, go to the **Global Setup / Business** page. Under the **Account Level Settings / Account Logo**, click on the Upload icon to upload your logo.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

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