

STEP TWO: Adjusting Event Settings

Once your event is created, the **Roster Editor** tab opens automatically. Here, you can set **Max Roster Size** to define the total number of participants allowed for your event. For further customization, go to the **Settings** tab.

UI Setup

Controls the functional behavior of your scheduler — when it's active, and what rules participants must follow.

Scheduler Availability

Setting	What it does
Open scheduler to customers on	Date/time the booking window begins
Close scheduler to customers on	Date/time the scheduler automatically locks for participants

Appointment Number Limits

Setting	What it does
Maximum Appointments per Event	Caps how many appointments a single participant can book within this event

Appointment Cancellations

Setting	What it does
Customer cannot cancel their appointment from	Cutoff date after which participants can no longer cancel their own registration
Cancellation Message	Optional custom message shown if a participant attempts to cancel after the deadline

Scheduler Settings & Links

Link	What it does
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Event Scheduling Link	Direct URL for this event. Customize it with a branded suffix (e.g., /SummerCamp) for a shorter URL.
Category Scheduling Link	Displays a scheduler limited to events in a specific category

“ **Important:** Even with a custom event link, participants can still toggle to any other **open** events on your account — unless you use the **Category** link, which restricts them to a single category.

Miscellaneous & Advanced Settings

Setting	What it does
Student Dropdown Requirement	Requires parents to select a pre-imported student name when booking
Allow a customer to take multiple slots <i>(under Advanced Settings)</i>	Lets a single participant book more than one appointment at the same time

Notification Setup

Manages automated email communications — toggle settings for **Confirmation**, **Cancellation**, **Custom**, and **Reminder** emails.

Confirmation & Reminder Emails

Setting	What it does
Send Confirmation and Cancellation Emails	Activates automated confirmation/cancellation alerts
Send Follow-up Emails	Activates follow-up emails, sent on date(s) you specify

Email Customization

Field	What it controls
Reply-To Email Address	Where participant replies are sent. If blank, replies get a generic automated response.
Subject Lines	Customize the standard subject, or the Subject for combined email (used when an appointment is canceled and immediately rescheduled)
Header / Body / Footer	Edit the email's text sections
Replace the Email Body with the Printable Schedule of Appointments	Replaces the email body with a table of the participant's appointments

CUI Messages

Customize the exact labels and text participants see on the Customer User Interface (CUI).

Modifying Display Text

- **Labels:** Select a label on the left (e.g., **Sign In Page / Welcome Message**) to edit the corresponding text on the right.
- **HTML content:** Click the **HTML icon** () in the toolbar to view/edit raw HTML for a message.

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