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.

Online Scheduler Settings (Event Scheduling)

Booking Settings	
Booking Window	
Booking Opens	Select the date and time you would like the scheduler to open for participants.
Booking Closes	Select the date and time the scheduler should close and no longer accept bookings.
Booking Limits:	
Maximum per Event	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
Cancellation Policy	

Customer may cancel their appointment up to **XX hours/days/weeks.**	Use this setting to prevent participants from cancelling their appointments within a specific timeframe (hours, days, or weeks) before the scheduled start time. Set this value to 0 if you wish to allow cancellations up until the last minute. Conversely, a very high value effectively disables the cancellation option for participants. Note: Closing the scheduler only prevents new bookings; it does not stop participants from cancelling existing appointments unless this lock-out period is active.

Share Your Scheduler

Scheduling Link

Account Scheduling Link	Displays all available events on the scheduler. If you have only one open event on the vendor account, we recommend that you use the Scheduling link for the account.
Event Scheduling Link	Displays the scheduler of the selected event with the ability to select other available events on this account.
Customize the event link	Allows you to customise the scheduling link for the selected event parameter.
Scheduling link for the category	Displays the scheduler with the list of event(s) of the selected category.

ADVANCED SETTINGS

Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
Student Selection	Require parents to select their student's name from a dropdown menu. (Note: This requires student data to be imported first.)

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

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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.

Revision #6
Created 2026-04-09 13:33:53 UTC by Yura Nechyporenko
Updated 2026-08-12 18:45:39 UTC by Tara Cicora