

# Admin UI

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# Why is the Appointments List red?

A "Problem Appointment" occurs when a registration is placed on hold because it no longer fits the current event configuration. When this happens, a **red exclamation mark (!)** will appear next to the [Appointments List](#) section on the sidebar, and the specific entry will be highlighted in **red**.

## Common Causes

Problem appointments are typically created when changes are made to the schedule after bookings have already occurred. For example:

- **Deleted Slots:** If you remove a time slot that already had a participant registered, the appointment is not automatically deleted. Instead, it is flagged as a "Problem" for you to resolve.
- **Resource Changes:** Modifying teacher availability or roster limits while the scheduler is live can sometimes trigger these alerts.
- **Conflicting Admin Actions:** A problem is triggered if an administrator (or teacher) manually books an appointment for a parent who has already successfully booked a slot themselves.

## How to Resolve

When you see a red exclamation mark in the sidebar:

1. Click on the **Appointments List** tab.
2. Locate the rows highlighted in **red**.
3. **Decide the Action:** You must manually choose to either delete the appointment, move the participant to a new available slot, or "Confirm" the slot to clear the flag.

For a full breakdown of specific scenarios and recovery steps, please refer to the dedicated **Problem Appointments** page in this manual.

# On the Appointments List page I noticed orange appointments with the status 'Customer is creating this appointment'. What do we need to fix these?

If you see appointments highlighted in **orange** on the **Appointments List** page, it indicates that a parent is currently in the middle of the booking process.

## What do these mean?

- **In-Progress Status:** The parent has selected the time slot but has not yet clicked the final "Create Appointment" or "Register" button.
- **Safety Lock:** These slots are temporarily reserved so that other parents (and administrators) do not attempt to book the same time while the current user is filling out their information.
- **Restricted Actions:** To prevent data errors, orange appointments **cannot** be manually deleted or selected for bulk email notifications while in this state.

## How to "Fix" Them

In most cases, **no manual intervention is required** from the administrator.

1. **Automatic Confirmation:** Once the parent completes the process, the orange status will disappear, and the appointment will turn into a standard confirmed booking.
2. **Automatic Cleanup:** If a user abandons their session or remains inactive for an extended period without finishing, the system will automatically expire the "hold" and release the slot back to the public.

## Benefits for Administrators

This feature is particularly helpful if you are manually booking appointments for parents via the Admin UI. By seeing these orange indicators, you can avoid selecting time slots that are seconds away from being finalized by a customer, preventing scheduling conflicts before they happen.

# How do I sort my teacher roster?

You can reorganize the teacher list on the **Appointments** page to follow a specific alphabetical order.

## How to Apply the Sort

1. Navigate to the **Appointments** page.
2. Locate the **Teachers** dropdown menu at the top.
3. Select the **Sort Teachers** option. The list will immediately refresh to follow your account's default naming convention.

## Changing the Sort Logic

The system sorts teachers based on the global naming preference set for your entire account. If you want to change whether they are sorted by First Name or Last Name, you must adjust the global settings:

1. Navigate to the [Global Setup / Business](#) page.
2. Locate the **Account Level Display Options** section.
3. Find the **Display Contact Name as** a setting.
4. Choose your preferred format:
  - **Last, First** (Recommended for large schools)
  - **First Last**

Once you update this setting and return to the Appointments page to "Sort Teachers" again, the roster will reflect your new preference.

# Every time I change the Open scheduler to customers on one of my events, it changes this on my other events? Why are my events connected?

## How to Separate Your Event Settings

To ensure that changes made to one event - such as the "Open scheduler to customers" date - do not affect your other events, follow these steps to disable propagation:

1. Navigate to the [Events / Preview](#) page.
2. Click the **Event Settings** button.
3. Locate the **Propagator Mode** section.
4. Find the setting labeled **Propagate Changes to:**.
5. Change the selection from **All events of this type** to **Only current event**.

## What is Propagator Mode?

- **All events of this type:** When this is selected, the system assumes you want a "global" configuration. Any change to a date, message, or setting on one event is instantly "pushed" to every other event of that same type.
- **Only current event:** This "unlinks" the events. It allows you to have different opening dates, different email notifications, and different rules for every individual event you create.

**Pro-Tip** If you have a group of events that *should* stay connected (for example, three different "Summer Camp" sessions) but one event that needs to be different (like "Staff Training"), keep the propagator on while you set up the camps, then switch it to **Only current event** before you begin configuring the specific details for the staff event.

# Is there a way to allow my parents to only see a certain event on our account?

Yes, you can use the [Category Sort](#) option to control what is seen and how it is seen on your account.