

STEP FOUR: Adjust Settings

Event Settings (UI Setup)

The **UI Setup** page lets you adjust settings specific to a single event.

To get there:

1. From the Admin UI, go to **Events / Preview** and select your event.
2. Click **Go To Event** to open Event Management.
3. Select **Settings / UI Setup**.

Work through the sections from top to bottom, as outlined below.

Scheduler Availability

Setting	What it does
Open scheduler to customers	Date/time the scheduler opens for parents
Close scheduler to customers	Date/time the scheduler closes for parents
Allow Admins access to the CUI at all times	Lets admins access the parent scheduling page even when it's closed to parents.

Appointment Number Limits

Setting	What it does
Maximum Appointments per Event	Caps total appointments allowed for the entire event
Maximum Appointments Per Resource per Day	Caps appointments per teacher/resource, per day — e.g., you can create 15 slots but cap bookings at 10; once the 10th is booked, no more can be made that day
One appointment per teacher per student	If checked, a parent can only book once with a given teacher per student, even if the student has multiple classes with that teacher
One appointment per class	If checked, a parent can only book once per class, even with multiple students enrolled in it

Setting	What it does
Allow back-to-back	If unchecked, parents can't book two appointments back-to-back unless they're with the same teacher (to allow travel time between teachers). Back-to-back is always allowed with the same teacher, or when travel breaks have been configured.

Appointment Cancellations

Customer cannot cancel their appointment closer than XX hours/days/weeks Restricts how close to the appointment time a parent can cancel.

- Set to **0** to allow cancellation up to the last minute.
- Set to a large value to effectively prevent cancellations.

“ **Note:** Closing the scheduler does **not** automatically prevent cancellations — this setting is separate.

Close Appointment Booking

Controls when slots become unavailable for **new bookings**, ahead of the appointment time. Choose one of three methods:

1. Close booking at a specific **time of day**, XX days before the appointment date.
2. Close booking XX **hours/days/weeks/months** before the appointment time.
3. Close booking XX **hours before the first appointment of the day**.

Scheduler Settings

Scheduling Link

Your event's **Scheduling Link** is the URL you share with parents (on your website or via email) to access the booking page (CUI). You can customize it with an event-specific suffix — for example:

`https://pickatime.com/HowardSchool/LS` or `https://pickatime.com/HowardSchool/US`

“ **Important:** Even with a custom event link, parents will see a toggle to switch to any other **open** events on your account. To restrict parents to a single event with no toggle option, use the **Category** link instead, which scopes the scheduler to only the event(s) in that category.

Scheduler Display

View mode:

Mode	Best for
Condensed	Compact layout with variable time steps — good for smaller screens or quickly browsing availability
Expanded	Fixed time intervals in a traditional layout — easier for comparing exact appointment lengths/gaps

Parents can toggle between views anytime using the button in the top-left corner of the scheduler.

Date display mode:

Mode	Behavior
Paginator	Shows multiple dates on one page
Calendar	Shows one day at a time, with a mini calendar to jump to other dates

Scheduler Display Limits

Display X weeks of slots: Sets how many days/weeks of slots are shown at once in the CUI.
(Only applies when Paginator is selected.)

Teacher Display

Setting	What it does
Display resource description	Shows the teacher's description (via the info icon next to their name)
Display rooms	Shows room numbers on the parent scheduler

Teacher's Group Name

Lets you organize teachers into groups (e.g., "Lower School," "Upper School").

1. Enter your desired group names in this section.
2. Go to the **Appointments** page — each teacher row has a **Group Name** column where you can assign them to a group from the drop-down.

Miscellaneous

- **Require parents to select their student name from a drop-down when booking an appointment (requires that students have been imported to the account)-**

This is used when you want a parent to attach a pre-imported student to their account.

Advanced Settings

Online Meeting Provider

Use 'X' for online meetings: Select your preferred online meeting provider for this event from the drop-down.

Multiple Appointment Booking

Allow a parent to make conflicting appointments for themselves: If checked, a parent can book overlapping appointments at the same time.

Appointment Changes

Setting	What it does
Allow customers to see and cancel past appointments	Lets parents view/cancel appointments that have already passed
Don't allow customers to change appointment time	Prevents parents from rescheduling once booked

Notification Setup

The **Notifications** tab lets you configure: **Confirmation Email**, **Cancellation Email**, **Reminder Email**, **Custom Email**, **Follow-up Email**, **Resource Notification Email**, and **Calendar Event Notification**.

Confirmation Email

Field	What it controls
Subject	Email subject line
Header	Text shown above the email body
Body	Main email text
Send Confirmation and Cancellation Emails	Sends a confirmation after booking (<i>typically left unchecked for schools</i>)
Support Email	Address that receives replies to confirmation/reminder/cancellation emails. If left blank, replies get an automated response directing them to contact your organization.
Replace the Email Body with the Printable Schedule	Recommended. Sends one consolidated email with a table of all booked appointments, instead of one email per appointment.

Reminder Emails

Send Reminder Emails: Click **Add** and enter the number of hours before an appointment that a reminder should go out. You can add multiple reminder times — duplicates are automatically removed.

How reminders are grouped depends on your Printable Schedule setting:

- **If "Replace the Email Body with the Printable Schedule" is ON:** All appointments are grouped into a single reminder email per day, sent the configured number of hours before that day's **first** appointment. With reminders set at both 24 and 12 hours, you'll receive two emails — one at each interval before your first appointment of the day.
- **If it's OFF:** Appointments booked within the **same hour** are grouped into one reminder email. For example, 9:00, 9:15, and 9:30 AM appointments would be combined into one email, while a separate 10:15/10:30 AM email would be sent independently.

Field	What it controls
Footer	Text shown below the email body
Subject for combined email	Subject line used when a combined email is sent (e.g., a cancel + immediate reschedule)

Recommended: Use the Printable Schedule as the Email Body

For both **Confirmation** and **Reminder** emails, you can replace the email body with a **Printable Schedule** — a table summarizing all of a parent's booked appointments (identical to what they'd see clicking "Printable Schedule" on the scheduler page).

To enable this: Check "**Replace the Email Body with the Printable Schedule of Appointments.**"

When enabled, the email will contain:

1. Your **Header** text
2. The printable schedule table
3. Your **Footer** text

“ The table's content/format is controlled separately under **Settings → CUI Messages → Print Schedule.**

With this option on, parents receive **one** email containing their full schedule — not one email per appointment.

Configure CUI (Customer User Interface)

You can customize most of the text and labels parents see when booking appointments.

To edit CUI messages:

1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To Event**.
2. Select **Settings / CUI Messages**.
3. On the left, choose a label to edit — the corresponding text appears on the right for editing.

Common customizations:

- **Login page title:** Edit under **Sign In Page / Welcome Message**.
- **Logo:** Go to **Global Setup / Business**, under **Account Level Settings / Account Logo**, and click the **Upload** icon.
- **HTML editing:** Click the **HTML icon** () in the toolbar to view/edit raw HTML for a given message.

Revision #9

Created 2026-04-07 18:30:56 UTC by Yura Nechyporenko

Updated 2026-06-21 00:18:57 UTC by Anne Taves