

STEP THREE: Create Slots

Creating Slots

To get started, from the Admin UI, go to **Events / Preview** and select your event. Click the orange **Go To Event** button to open your event. You will then see the **Appointments** tab. From the left-hand calendar, select the date you want to work with. Open the **Slots** drop-down and choose **Create Slots**.

Step 1: Choose Which Teachers to Create Slots For

In the slot generator, choose to create slots for **selected teachers** or **all teachers/resources**. To select multiple teachers, hold **Ctrl** while clicking names in the right-hand panel.

Step 2: Set Your Time and Duration

Field	Description
From	Start time of the first slot
To	End time of the last slot
Duration	Length of each appointment (in minutes)
Travel Break	Optional gap between appointments

Example: 10-minute slots with a 5-minute travel break create slots at 8:00–8:10, 8:15–8:25, 8:30–8:40, and so on.

Note: If you need a break that doesn't align with your slot duration (e.g., 20-minute slots but a 40-minute lunch break), create slots in **two batches** — one before the break, one after.

Step 3: Choose Appointment Type

Type	Description	Indicator
In-Person	Parents receive room/location info	P
Virtual	Parents receive a meeting link	V
In-Person or Virtual	Parents choose their preferred format	PV

Step 4: Set Slot Visibility

Option	What it does
Visible for Customer	Available for online booking
Hidden from Customer	Hidden from parents; visible in Admin UI only
Shown with "Call" Status	Visible to parents, but they're prompted to call the school to book
Make Unavailable	Visible in Admin UI but not bookable online (use for lunch breaks, meetings, etc.)

You can optionally add a custom message for unavailable slots.

Step 5: Set Maximum Appointments Per Slot *(Optional)*

Use this for group sessions, open labs, or any scenario where multiple families can book the same time slot.

Creating Slots for Multiple Days or Teachers

Scenario	What to do
Same schedule across multiple days	Enable Multiple Dates and select all applicable dates before saving
Different schedule per day	Create slots for the first day, switch to the next date, and repeat
Different schedules per teacher	Select a teacher (or group), create their slots, then repeat for the next teacher/group

Tip: If you created identical slots for all teachers at once, individual slots won't display until you click a specific teacher's name in the right-hand panel.

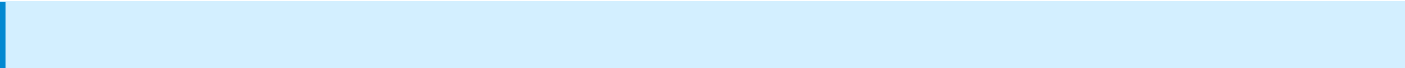
Updating Existing Slots

Use **Update Slots** to change existing slot characteristics without deleting and recreating them.

To access: Appointments tab → select date/teacher → Slots / Update Slots

You can update:

- Appointment type (e.g., switch from in-person to virtual)
- Maximum appointments per slot
- Slot visibility (hidden, unavailable, etc.)



Tip: If you created identical slots for all teachers at once, individual slots won't display until you click a specific teacher's name in the right-hand panel.

"Keep existing slot type on slots being updated" — useful when teachers have already blocked parts of their schedule, since it lets you change appointment type without affecting slot type.

Blocking Slots

Blocking is the preferred way to **temporarily** remove availability without permanently deleting a slot.

1. Go to the **Appointments** page and click the **X** in the corner of the slot.
2. The slot turns **red** and displays "Blocked." You can enter a custom message (e.g., "Lunch Break" or "Staff Meeting").
3. To unblock, click the **X** again to restore availability.

Blocked slots appear on reports when **Show All Slots** is enabled.

Deleting Slots

Use **Delete Time Slots** to permanently remove slots.

To access: **Appointments tab** → **select date/teacher** → **Slots / Delete Time Slots**

If appointments already exist on those slots, you'll be prompted to choose:

- **Move appointments** to the red Appointments List (a holding area for manual rebooking or cancellation)
- **Cancel appointments** without sending a notification
- **Cancel appointments** and send a cancellation email

Tip: Consider whether parents need a cancellation notification before confirming any deletion.

Moving Slots

Use **Move Slots** to transfer an entire day's slots — and any existing appointments — to a new date. Useful for school closures, rescheduled conference days, or teacher availability changes.

To access: **Appointments tab** → **select date/teacher** → **Slots / Move Slots**

In the dialog, select the destination date, choose whether to move slots for all teachers or selected teachers, and confirm.

Existing appointments transfer with all parent information intact, and appointment **times remain the same**.

Important: Calendar notification emails are **not** sent automatically — advise parents to update any calendar entries they've saved. You can send a custom notification email explaining the change.

Copying Slots

Use **Copy Slots** to duplicate a day's slot *structure* to another date or teacher — **without** copying existing appointments.

To access: **Appointments tab** → **select date/teacher** → **Slots / Copy Slots**

Select the destination date and/or teacher(s) and confirm. Slot visibility, appointment type, and availability settings are all preserved.

If you also need appointments to transfer, use **Move Slots** instead.

Changing Slot Duration or Times

Slot start times, end times, and duration **cannot be edited in place**. To change any of these:

1. Delete the slots you want to change (or all slots for that day).
2. Recreate them with the correct settings.

Example: If you have 10-minute slots from 8:00 AM–2:00 PM but want 9:00 AM–1:00 PM instead, delete the 8:00–9:00 AM and 1:00–2:00 PM slots (or delete all and start fresh), then create the new schedule.

Quick Reference: Which Tool to Use?

Situation	Use
Temporarily remove availability	Block Slots
Permanently remove slots	Delete Time Slots
Change appointment type or visibility	Update Slots
Reschedule an entire day	Move Slots

Situation	Use
Duplicate a schedule to another day or teacher	Copy Slots
Change slot duration or times	Delete + Recreate

Slot Color Guide

Color	Meaning
 Blue	Available
 Red	Blocked
 Grey	Teacher is booked elsewhere (team meeting or personal appointment)
 Yellow	Time has passed

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