Global Setup

- Global Setup / Business page
- Global Setup / Contacts

Global Setup / Business page

Business Settings	
Primary Contact	Select the contact record of the person who will manage the vendor account. Usually, it is the Admin who created this vendor account.
Billing Contact	Select the contact record for the person designated to receive invoices and billing correspondence from pickAtime.
Business Address	Enter the physical or legal mailing address for the business.

Account Level Settings	
Account Logo	Upload your organization's logo to be displayed on the vendor account scheduling pages.
Account URL	
Appointment URL for customer	This is the primary scheduling link you will provide to customers (e.g., parents) to book appointments.
Set custom URL	Check the ‘Set custom URL’ box to personalize the link. You can define a custom slug in the designated field to make the URL more recognizable.
Use ID field	Enable this to restrict access to the scheduling URL. Customers will be required to enter a valid ID that matches a contact record previously imported into your account.
Display Options	
Display Contact Name As	Choose the format for contact names in Reports, the Appointment List, and the Event Management section (e.g., ‘Last, First’ or ‘First Last’).
Date Display Format	Select your preferred date format: ‘mm/dd/yy’ or ‘dd/mm/yy’.

Time Display Format	Select your preferred time format: ‘12-hour’ (AM/PM) or ‘24-hour’.
Email notifications from	Specify the sender name or email address that will appear on outgoing system notifications instead of pmail@pickatime.com.

Miscellaneous

Allow parents to attach and detach students	Enable this to allow parents to manage and update their associated student list within their profile.
Use First + Last Name as StudentID	Enable this if you prefer parents to identify students by name rather than the school ID. This is recommended if parents are unlikely to know specific Student ID values.

Integration Options

Notification Contact(s)	Select the individual(s) who will receive status updates and notifications regarding active integrations.
Zoom Integration	View the dedicated instructions page for details on connecting your Zoom account.
Google Workspace Integration	View the dedicated instructions page for details on connecting your Google Calendar and Workspace.
Single Sign On (SSO)	Select your SSO Provider from the dropdown menu. Additional setup steps will be required based on the provider selected.
Admin UI is accessible only via SSO	Warning: Enable this only after confirming your SSO configuration is fully functional; otherwise, you may be locked out of the Admin UI.
Require customers to fill email	Forces customers to provide an email address during booking if their imported contact record is missing one.
Payments	Select ‘Use Shopping Cart’ to allow participants to book multiple appointments and pay for them in a single transaction. Note: This setting applies to all events on the account that require payment.

Registration and Login Settings

Do not allow self-registration	Prevents new users from creating their own accounts. Access is available to customers who have been manually added or imported to the vendor account. Please note that this option is now automatically disabled when “Show the scheduler to users before they log in” is enabled.

Login

Show the scheduler to users	Determines if customers can view available events and time slots before or after logging in. Note: For a vendor account with the PTA event type, users must log in to view the scheduler.
Allow login with external provider	Enables the Sign In with Google option on the scheduling login page. This feature can be used when “Show scheduler before or after login” is enabled.
Show the following message to Locked contacts	Define the message displayed to users whose access level has been set to ‘Not Allowed’ on the Contacts page.

Password Requirements

Use strong password	PickAtime passwords require a minimum of 8 characters and can only contain numbers, letters, and !@#$%&\/=_.,;: Activating this option also adds the following requirements: digits, Upper and Lower Case, and special characters. It also gives you access to the lower two options.
Password must be changed every 90 days	Requires participants to update their passwords every 90 days for enhanced security.
Password must not be used for 10 rotations	Prevents users from reusing any of their last 10 passwords.

Advanced Settings

Required Fields	If ‘Force to fill required fields on the VUI’ is enabled, Administrators booking on behalf of customers must complete all mandatory contact/appointment fields.
Vendor State	Use this setting to deactivate your vendor account if you intend to stop using pickAtime services.

Global Setup / Contacts

Use this section to configure custom prompts and registration forms. This allows you to collect essential information from participants (such as parents) when they first register or log in to your scheduling site.

See also the Collect Information from Customers page.

Advanced Options

Feature	Functionality	Instructions	Notes
Default Password	Reset passwords for any contact except those with Administrator access.	Navigate to the Contacts tab, search for the user, and click Reset PW.	Change the global default password (e.g., 123456) under Global Setup / Contacts / Advanced Options.
Reset Admin Passwords	Resets passwords for all Admin levels (except the main Administrator) to the Default Password.	Click the Reset Admin Passwords button.	This will NOT reset passwords for Admins who have signed in within the last month.
Modify Access Level	Enables mass updates to Admin access levels.	Select the new access level from the options provided.	Often used to upgrade "Appointment Viewers" to "Appointment Makers" to enable the Block Schedule feature.
Remove All Parents	Deletes contact records with a ParentID value.	Click the Remove All Parents button.	Does not remove parents who have logged in during the last month.
Remove All Customers	Removes contacts from the database based on a selected access level.	Select the access level in the pop-up; this removes that level and all lower levels.	Will not remove contacts with future appointments or those who signed in during the previous month.
Remove All Students	Removes all students from the vendor account.	Click the Remove All Students button.	Excludes students enrolled in future classes or events active in the previous month.
Remove Students not enrolled	Deletes students who are not currently enrolled in any event.	Click the Remove Students not enrolled button.	Useful for removing mistaken imports or graduated students.