

Collecting Information from Customers (Contact & Appointment Fields)

pickATime lets you collect custom information from participants at two different points:

- When they **create an account** (Contact Fields)
- When they **book a specific appointment** (Appointment Fields)

Both support various answer types — including **text**, **date**, **radio buttons**, **drop-down lists**, and **checkboxes**.

1. Choosing the Right Field Type

	Contact Fields	Appointment Fields
When it's collected	During initial account sign-up	Every time a slot is booked
Frequency	Once per user	Once per appointment
Best used for	Phone number, address, language preference — info tied to the person	Student name, meeting topic, teacher-specific questions — info tied to the appointment
Location	Global Setup / Contacts / Contact Fields	Settings / Appointment Fields

2. Setting Up a Field

Both field types use the same basic process:

1. Go to either **Global Setup / Contacts** or **Settings / Appointment Fields**, depending on which type you're creating.
2. **Add the field:** Type the field name (e.g., "Phone Number") into the **Add New** box and click **Add**.
3. **Activate the field:** It will appear under **Available Fields** — select it, then click the button to move it into **Included Fields**.
4. **Admin visibility:** Check "**Required for Admins**" if you want staff to see/fill out this field when testing the system.

Pro tip: Don't create custom fields for **First Name**, **Last Name**, or **Email** — these are already collected automatically during registration. Adding them again will prompt users to enter the same information twice.

3. Configuring a Question with Multiple Choice Answers

If you want a field to use **radio buttons**, a **drop-down list**, or **checkboxes**, you'll configure it as a "Choice" type field:

1. In **Included Fields**, locate the **Type** column for your question.
2. Click the cell and select "**Choice**" from the drop-down.
3. The **Question Editor** will open. Click **Add New Option** to add each possible response.
4. Choose a display format:
 - Drop-down list
 - Radio buttons
 - Checkboxes
5. Use the **arrows** (**<>**) to reorder the options as needed.

4. Conditional Logic: Show/Hide Fields Based on Responses

You can make fields appear or disappear dynamically based on how a participant answers a Choice-type question.

Each Included Field is assigned a number, which is used to reference it in the conditional logic.

To enable this: Check "**Hide/Show fields based on the user response**" on the question you want to control others with.

To configure it: Next to each answer option, enter the field numbers to **hide** or **show** when that option is selected:

- **To hide fields:** Enter their numbers directly — e.g., or
- **To show specific fields instead:** Prefix each number with a — e.g.,

⚠ This logic only applies to fields that come **after** the conditional field in the list — it cannot affect fields earlier in the form.

Example: If a participant selects "**Junior**" for a given question, you could configure the rule to show only fields 5 and 6 — hiding everything else beyond that point unless explicitly shown.

5. Restricting Date Ranges

For Date-type fields (e.g., Date of Birth), you can restrict the range of dates a participant is allowed to enter.

Why this matters: Schools have reported participants accidentally entering today's date in a DOB field. The **Restrict Dates** option helps prevent this kind of erroneous entry.

To use it: On a Date-type field (in either Contact Fields or Appointment Fields setup), enable **Restrict Dates** and define the valid range — e.g., no dates after the year 2000.

6. Viewing the Collected Data

In the Appointments Grid (Admin View): For Appointment Fields, you can view responses immediately without running a report:

1. Go to the **Appointments** page.
2. Click any booked slot.
3. View the participant's custom field responses in the section below the calendar (left-hand side).

In Reports: To include custom fields as report columns:

1. Go to the **Event Report** section.
 2. Click the blue **Contact Fields** or **Appointment Fields** link.
 3. Check the box in the upper-right corner of the pop-up to select **all** fields, or choose specific ones.
 4. Confirm your selection — the fields will now appear as columns in your report.
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