

Blackbaud User Guide

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Introduction

PickAtime is an award-winning, Blackbaud-approved partner providing online scheduling solutions for schools and organizations across the United States, Canada, and globally. Our products help schools easily schedule parent-teacher conferences, school tours, admissions evenings, interviews, counseling appointments, school fairs, and more.

Our Blackbaud Integration

The integration has two components:

1. **Single Sign-On for parents** — Parents can access the pickAtime Online Scheduler directly from the **Blackbaud Resource Board**, via a pickAtime tile.
 2. **Automated data transfer** — School data (students, parents, teachers, classes, and enrollment) transfers automatically from Blackbaud into your pickAtime account. When parents click the conference scheduling link in your school portal, they'll immediately see their students' teachers and that group's live availability.
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“ **Pricing note:** In addition to pickAtime's standard per-teacher rates, there's a **\$350 annual Blackbaud integration fee** — billed directly by pickAtime, since this is a fee Blackbaud charges us.

Admin UI

When you first log in to your pickAtime account, you will automatically land on the Administrative User Interface, with the Event Reports displayed by default.

Profile & Sidebar Navigation

- **Profile Settings:** In the top-left corner, your name is displayed. Click the back arrow (<) to edit your profile, change your password, or log out.
- **Minimize Sidebar:** Click the "X" in the green ribbon to collapse the sidebar and expand your workspace.

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- **Multi-Account Users:** Use the Vendor drop-down menu to toggle between different accounts.

Left-Hand Navigation Menu

- **Reports:** View both account-wide and event-specific data.
 - **Account Reports:** Select this button to view billing and global data.
 - **Event Reports:** Select this button to view data for specific events. Use the Event drop-down to switch between events, and the Report drop-down to switch between specific report types. (See the Reports section for more details).
- **Events Preview:** Create, view, and manage your scheduled events.
- **Appointments List:** View all upcoming appointments globally, or filter them by date/event. From this page, you can delete appointments and send one-off emails to participants.
- **Contacts:** Manage all users linked to your account (Administrators, Teachers, Parents, and Students).
 - **Students:** View their enrolled classes.
 - **Parents:** View scheduled appointments, history logs (bookings, cancellations, emails sent), or manually reset parent passwords.
 - **Teachers:** View and adjust administrative access levels.
- **Importer:** Upload your roster and data files.
- **Global Setup:** Manage your sitewide configurations across two tabs:
 - **Business:** Update your school's name, address, and core account settings.
 - **Contacts:** Create custom prompts and forms for parents to complete when they first register on your scheduling site.
- **Calendar Sync:** Authorize administrators to sync their Google and/or Outlook calendars with the platform.

- **Online Scheduler:** A quick-access link to the live booking page (also known as the Customer User Interface or CUI).
- **Add New Account:** Opens a new window to set up a brand-new business or sub-account.
- **User Manual:** Opens the comprehensive Online User Manual in a separate window.
- **Tour This Page:** Launches an interactive, step-by-step guided walkthrough with helpful on-screen popups.

Information for Previous Users

Setting up a new event

If you've used pickAtime before, you **don't need to create a new account** — simply create a new event under your existing account (e.g., "Parent Teacher Conferences 2026").

Unless you are directed otherwise, you do **not** need to recreate your SSO connection.

Recommended order:

1. Create the new event **first**.
2. Delete the old event **afterward**, if you're not reusing its data.

Creating the new event before deleting the old one preserves your settings — **Online Scheduler Settings, Notification Setup, and CUI Messages** — by carrying them over.

⚠ **Don't simply rename your old event.** Importing new class/enrollment data into a renamed event will **merge** with the old data, rather than replacing it.

⚠ **Deleting an event deletes its class and enrollment data.** Don't delete an old event if you plan to reuse that data.

To reuse previous class/enrollment data: Use the **Duplicate PTA** option on the Events page. This is intended specifically for a second set of conferences using the **exact same** class/enrollment data as the first.

If this option isn't available on your account, email support@pickatime.com to have it enabled.

Administrator Information

At the beginning of each year you should plan to remove any old admins and add new admins.

To add an Admin

1. **Navigate to Contacts:** In the Admin UI, go to the **Contacts** page.
2. **Add New Admin:** Select the **Add > Admin...** button.
3. **Enter Details:** Fill in the user information on the *Add New Contact* form.
4. **Set Access Level:** In the **Admin Level** pull-down menu, select **Appointment Viewer**.
5. **Save:** Click to finish.

Note: If you see a red message stating "*Vendor already has a contact with this email*," do not panic. Click the blue **Go back** button and use the **Search** tool to find the existing contact by name.

Assigning Specific Access

Once the contact is created or located:

- Go to the **Vendor Access** tab.
- Locate the specific **Event** and **Teacher** this person needs to monitor.
- Click the **checkbox** next to the name to grant report access.

First-Time Login Instructions

You can provide these steps to the new admin to help them get started:

- **URL:** Go to pickatime.com.
- **Step 1:** In the **Login** section, enter your email address and press **Login**.
- **Step 2:** On the following page, you will be prompted to create a unique password for your account.

To remove an old Admin

1. **Navigate to Contacts:** In the Admin UI, go to the **Contacts** page.
2. **Locate the Contact:** do a search for the contact by first or last name or by email.
3. **Delete the Contact:** Click on the Contact's name and click the DELETE button.

Contact Information

What happens to contact data between events

Contact information — including parent/teacher login credentials and student records — is **retained across events** and is **not deleted** when you delete an event. This means:

- Parents can log back in with their original email and password.
- Any students previously linked to a parent's account remain linked.
- Parents who've forgotten their password can use **Forgot Password** on the login page.

This is especially useful for schools running **multiple conferences per year**.

If you'd prefer parents create fresh accounts each time (e.g., for annual conferences), you can manually clear old contact data.

How to remove all previous contact information

1. Go to **Global Setup / Contacts**.
2. Click **Show Advanced Options**.
3. Click **Remove All Customers**.
4. Select the access level to delete from the pull-down.

Access levels (from broadest to narrowest):

Level	Who it includes
Customer access	Parents and students
Appointment Viewer	Teachers
Appointment Maker	Admins with Appointment Maker access
Resource Administrator	Admins with access to a select group of teachers
Event Administrator	Admins with access to one or more events

Important: Deleting a given level also deletes every level below it on this list. For example, deleting Resource Administrator also deletes Appointment Maker, Appointment Viewer, and Customer access (parents).

To remove stored student data specifically: Click **Remove All Students**.

Exceptions — what won't be deleted

- Contacts who have **logged in within the last 2 months**
- Contacts who have **booked an appointment within the last 2 months**
- Students currently **enrolled in any event** on your account

⚠ When you should remove old contact data

You'll want to clear previous contact/student data if either of the following applies:

- **Teacher IDs are being reused** — e.g., a new teacher will use a departing teacher's TeacherID
- **Student IDs have changed** for your students

Preventing Duplicate Contacts When Enabling Blackbaud Integration

When this applies: If your school previously used pickAtime **without integration** — importing data files manually — and is now switching to the **Blackbaud integration**, you may end up with **duplicate contact records**. This happens because the new integration uses different contact IDs (TeacherID, StudentID, ParentID) than your old manual imports.

Recommendation: Clear out old data **before** running your first integration import.

Steps to Remove Old Data

1. **Create a new event**, using a past event as a template to preserve your settings, notifications, and appointment fields.
 2. *(Optional)* **Export reports** from your past events on the **Reports** page, in case you need that historical data later.
 3. **Delete all past events**, except the new one you just created.
 4. Go to **Global Setup / Contacts / Advanced Options**, then click **Delete All Contacts**.
 - In the pop-up, select **Admin Level - Event Administrator** as the level to delete.
 - This removes all contacts at that level **and below** — including all parents and students (Customer access level).
 5. **Run your new integration import.**
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This ensures clean, duplicate-free data syncing going forward.

Setup Steps

Blackbaud Checklist

To set up your Parent-Teacher Conference event using the PTA scheduler with Blackbaud integration, follow these steps:

1. **[Integrate with SKY API, Set Up Your Account, and Set Up Event](#)** Create your conference event and give it a clear, descriptive name (e.g., "Fall 2026 Conferences"). Adjust your account settings for Blackbaud SSO.
2. **[Export Your Data](#)**: Export your students, teachers, classes, and enrollment data from Blackbaud. Once exported, verify the data imported correctly in the Admin UI.
3. **[Create Slots for the Event](#)** After verifying your data, create your time slots — including dates, times, and appointment durations.
4. **[Create the SSO](#)** - Blackbaud uses SSO for parent access from the Resource Board.
5. **[Configure Settings](#)**
 - **Appointment Settings** — Adjust various settings specific to your event.
 - **Configure Email** (*optional*) — Customize the default email confirmations and reminder notices, if needed.
6. **[Turn It On and Test the Scheduler](#)** Once your data is complete and time slots are created, activate the scheduler and test the booking experience.

Setup Account

Integrating with Blackbaud SKY API

Before connecting to pickAtime in the SKY API, confirm you have a pickAtime account for your school. If not, [create one here](#).

Also confirm your school meets Blackbaud's [SKY API prerequisites](#).

Pricing note: A **\$350 annual integration fee** applies.

Connecting the pickAtime App

1. In Blackbaud.com, go to [Marketplace](#).
2. Search for **pickAtime**.
3. Select **pickAtime** from the results.
4. Click **Connect**.
5. Click **Go To Application Website**.

Next Steps

Once your pickAtime account exists and is connected to the SKY API, you'll need to:

1. Update your **Account Settings** (below).
2. Begin [Setting Up Your SSO](#).

Account Settings

1. Log in to pickAtime with your email and password.
2. Go to **Global Setup / Business**.
3. Locate the **Single Sign On** section (*under Advanced Options*) and confirm **SSO Provider** is set to **Blackbaud**.

Field	What it does
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SSO Login URL	Redirects participants to a login page after their session expires, so they can re-access the system. Should point to your portal or website.
SSO Secret Key	Provided by Blackbaud during SSO setup for your school's account
SKY API Importer	Enable this if you intend to use it

⚠ **Important:** Enabling Blackbaud SSO **removes your Account URL**. Once connected, parents and students access your account exclusively through the **Blackbaud Resource Board tile** — not a direct pickAtime link.

Create Your Event

When you first log into pickAtime, you'll land in the Admin tool on the **Event Reports** page.

Steps to Create a New Event

1. Select **Events/Preview** from the sidebar.
2. Click **Add**.
3. Enter a name for your event — e.g., .
4. Select the event type: **PTA**.
5. *(If you've used pickAtime before)* Select a **Template** from the pull-down, based on a previous event. This carries over your starting settings from **Online Scheduler Settings**, **CUI Messages**, and **Notifications Setup**.
6. Select your event's **time zone**.
7. *(Optional)* Add a **Date** and **Location**.

Once saved, your event will appear as a new row in the Events list.

About the Date and Location Fields

These fields are optional and primarily used to **distinguish between multiple events** when more than one is listed.

- The **Date** field is just a label — if your conference spans multiple dates, you can list them all here, or leave it blank.
- You do **not** need to create a separate event for each date — a single event can include any number of dates.

Adding Event Details

Use the **Event Details** box to add event-specific information you'd like to display on the scheduler or include in emails.

Anything entered here becomes available as a macro: `$(E_DESCRIPTION)`

You can insert this macro into your **CUI Messages** or **Notifications Setup** templates to automatically pull in this text.

Removing a Previous Event

If you've used pickAtime before and are importing new data, you can delete your previous event(s) once the new one is created.

1. Create your new event first (see steps above).
2. Click **Delete** on the old event.

Creating the new event **before** deleting the old one lets you use the previous event as a template. Be sure to confirm your new event is set to type **PTA**.

Creating your SSO

Create the SSO

PickAtime can link directly from the **Blackbaud Resource Board** to your Parent-Teacher Conference event via Single Sign-On. (For help building a Resource Board, see [Blackbaud's Resource Board help file](#).)

Choose your path:

- **New schools** (no existing pickAtime/Blackbaud integration) — follow **Part 1** and **Part 2A** below.
- **Current schools** (already integrated, updating your SSO link) — follow **Part 1** and **Part 2B** below.

Unless you are directed otherwise, you only need to do this **once**. **Not** annually or per event.

Part 1: Establish the SSO Connection Between Blackbaud and pickAtime

(This part is identical whether you're setting up SSO for the first time or updating an existing connection.)

This requires copying a **Redirect URL** from pickAtime into Blackbaud, then copying a **Secret Key** from Blackbaud back into pickAtime. You'll need to be logged into both accounts to copy/paste between them.

1. Log into pickAtime, go to **Global Setup / Business / Show Advanced Options**, and under **Single Sign On Options**, select **Blackbaud** as your SSO Provider.
2. Copy the **Redirect URL** shown — you'll need it in step 4.
3. In Blackbaud (as a Platform Manager), go to **Core / Security / Authentication Settings / SSO Settings**.
4. Click **Add New**.

5. Enter a **Name** for your SSO — saving will auto-generate a **Slug** based on this name.
6. Paste your **Redirect URL** (from step 2) into the appropriate field.
7. Be sure to include the `{token}` placeholder, **with the curly braces**.
8. Check **Allow Impersonation**.
9. Click **Save**.
10. Edit the item you just created, then select and copy the **Secret Key**.
11. Return to pickAtime, go to **Global Setup / Business / Show Advanced Options**, and paste the Secret Key into the **SSO Secret Key** field.

📌 **Tip:** The Secret Key is 88 characters — longer than the visible field. Triple-click the text field to select the entire string.

You've now connected Blackbaud and pickAtime. Next, you'll need a **Blackbaud Resource Board tile** that points to pickAtime — see Part 2 below.

Part 2A: Add the SSO Link to a Resource Board (New Schools)

📌 **Watch our video:** [Setting Up Your School's Single Sign-On](#)

1. From **SSO Settings**, copy the URL next to the SSO item you just created.
2. As a Platform Manager or Content Editor, go to **Core / Content / Additional Content Types / Links**.
3. Click **Add New Category**, and name it.
4. Click **Save & Add Link**.
5. Enter a **Title**.
6. In the **URL** field, combine your school's app URL with the SSO segment from step 1, replacing the slug: `https://SCHOOLNAME.myschoolapp.com/app/sso/auth/SLUG`
7. Click **Save**.
8. Go to **Core / Content / Resource Boards**.
9. Next to **View Boards**, choose the relevant role/security group (e.g., **Parent**).
10. Click **Add Post**.
11. Enter a **Title**, **Description**, and **Cover Photo**.
12. For **Post Cover**, select **Direct Link**.
13. Select the **Category** you created earlier.
14. Select your **Link** (the SSO link from step 6).
15. Click **Save**.

Part 2B: Update Your Resource Board (*Current Schools*)

📺 Watch our video: [Setting Up Your School's Single Sign-On](#)

1. From **SSO Settings**, copy the URL next to the SSO item you just created.
2. As a Platform Manager or Content Editor, go to **Core / Content / Additional Content Types / Links**.
3. Locate and click your existing pickAtime link.
4. Click the **edit icon**, locate the link destination, and click **Change**.
5. Select **Link / URL**.
6. In the **URL** field, combine your school's app URL with the SSO segment from step 1, replacing the slug: `https://SCHOOLNAME.myschoolapp.com/app/sso/auth/SLUG`
7. Click **Save**.

Testing Your SSO

1. Go to **Security / Authentication Settings / SSO Settings**, and edit your SSO link to confirm **Allow Impersonation** is enabled.
2. Under your profile menu, select **Impersonate User**.
3. Find a user to impersonate. (*Make sure this user also exists in pickAtime — Blackbaud User IDs determine the user's role in pickAtime.*)
4. While impersonating, go to that user's **Resource Board**.
5. Click the pickAtime link to confirm it opens the event correctly.

Notes

- The relevant board(s) must be selected for the SSO link post to appear under the **Resources** tab.
- When manually adding users to pickAtime, you'll need their **First/Last Name**, **Email**, and their **Teacher ID** or **Parent ID**.
- For more on Blackbaud SSO, see Blackbaud's [SSO Tutorial](#).

Export your Data

In the Admin UI, select **Importer** from the sidebar.

Step 1: Authenticate with Blackbaud

1. Click **Sign in to Blackbaud**.
2. Click **Authorize**.

⚠ **Requirements:** At least one admin must be authenticated with a Blackbaud ID, hold one of the following roles — **Academic Group Manager**, **Schedule Manager**, or **Platform Manager** — and have the **SKY API Data Sync** role. Importing **Advisory** data additionally requires the **Advisory Group Manager** role.

Step 2: Run the Import

Select your **Import Type**, **Event**, and **Term**, then click **Import**.

There are **3 import types**, depending on what data you need:

Option A: Academic Import (Parent-Teacher Conferences)

Use this to import class and enrollment data for standard PTA conferences.

1. Select Import Type: **PTA Event**.
2. Select the specific **event** to import data into.
3. Select **Academics** as the Offering Type.
4. Select the specific **Term ID**.

⚠ **Important:** If you remove teacher/class/student data manually in pickAtime, it **will be re-added** on your next Blackbaud data sync. Instead of deleting unwanted classes, set their slot type to **"Hidden"** — hidden classes are skipped during future imports/auto-syncs.

Option B: Advisory Import (Advisory-Only Conferences)

Use this to import data for advisory-only conferences. Requires the **Advisory Group Manager** role (see authentication requirements above).

Option C: Admissions Import (Admission Events)

Use this to import parent data for admissions events.

- Includes a **Parent Type** selector — choose **Parent of Incoming**, **Parent of Candidate**, or both.
- Imported contacts will have the role **Parent of Candidate** or **Parent of Incoming Student**.

Note: Contacts imported via Admissions import do **not** have access to the Resource Board.

If Your School Doesn't Use Blackbaud Academic Data

If your school doesn't track Academic data in Blackbaud, you'll need to import your **Teacher**, **Class**, and **Enrollment** files manually instead:

1. Go to **Global Setup / Business / Single Sign On**.
2. Uncheck "**Use SKY API, Importer.**"
3. [Create and import your data files](#) as you normally would.

Viewing Your Imported Data

1. From **Events Preview**, select your event and click **Go To Event**.
2. Select **Class Editor** to see your teacher list. Select a teacher to see their classes; select a class to see enrolled students.

See **Modifying Teacher or Room Data** to add/remove teachers, **Moving a Class** to reassign a class, and **Modifying Enrollment Data** to add/remove students from a class.

To view data organized by class instead: Check "**Show Only Classes**" (far right).

FAQ

When I attempt to import data, the system is asking for a file upload (as if we were not a Blackbaud school). How do I resolve this?

Go to Global Setup/Business/ Integration Options/Single Sign On. Click the **Use SKY API Importer** option.

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Creating Time 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

Type	Description	Indicator
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
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

Configure Settings

Event Settings (Online Scheduler Settings)

The **Online Scheduler Settings** 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 / Online Scheduler Settings**.

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

Booking Settings

Booking Window:

Booking Window:

Booking Opens: 01/01/2022 12:00 AM

Booking Closes: 11/21/2030 12:00 AM

☐ Administrators can access the scheduler at any time

For schedulers with multiple booking dates, close booking:

☐ at 12:00 AM 0 days before the appointment

☒ 0 Month(s) before the appointment

☐ 0 hours before the first appointment of the day

Setting	What it does
Booking Opens	Date/time the scheduler opens for parents
Booking Closes	Date/time the scheduler closes for parents
Admins can access the scheduler at any time	Lets admins access the parent scheduling page even when it's closed to parents.

For schedulers with multiple booking dates, close booking:

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

Booking Limits:

Maximum Per Event:

0

[0 = no limit]

Maximum Per Student:

0

[0 = no limit]

☐ One appointment per teacher (regardless of number of classes that have this teacher)

☐ One appointment per class (regardless of number of students enrolled in the class)

☒ Allow back-to-back appointments

Cancellation Policy:

Customers may cancel appointments up to:

0

Week(s)

before appointment time (0 = no limit)

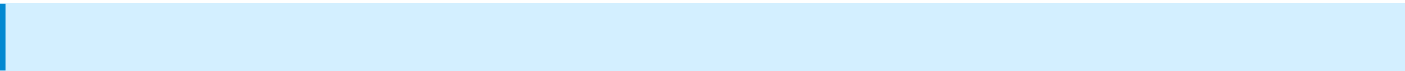
Booking Limits:

Setting	What it does
Maximum per Event	Caps total appointments allowed for the entire event
Maximum Per Child	Caps how many appointments a parent can book per child
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
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.

Cancellation Policy:

Customer may cancel their appointment up to 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.

Display Settings

Display Settings

Scheduler Display:

Initial Table Layout

Condensed

 ⓘ

Navigation Style

Paginator

 ⓘ

Display

3

Day(s)

 on the scheduling page

Teacher display:

☒ Show descriptions

☒ Show class names

☒ Show a separate legend per student

Teacher Groups:

☒ Group teachers

		Group Name
⬆	✖	group a
⬆	✖	group b

total: 2 rows/pg:

5

Scheduler Display

Initial Table Layout:

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.

Navigation Style:

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

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 description	Shows the teacher's description (via the info icon next to their name)
Separate legend for each child <i>(Regular PTA only)</i>	Adds a separate color legend per child
Display class names	Shows class names (via the info icon) if class names have been added on the Appointments page

Teacher Groups

Allows you to organise 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.

Advanced Settings

Advanced Settings

Online Meeting Provider: Use MS Teams for online meetings

Multiple Appointment Booking: ☐ Allow overlapping appointments ⓘ

Appointment Changes: ☐ Allow customers to view and cancel past appointments
☐ Don't allow customers to reschedule appointments ⓘ

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 Setup](#) 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 customise 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 customisations:

- **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.

Turn it On and Test the Scheduler

1. Open the scheduler

1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To Event**.
2. Select **Settings / Online Scheduler Settings / Event Settings / Booking Window**.
3. Set "**Open scheduler to customers on**" and "**Close scheduler to customers on**" to define the window during which parents can book appointments.

To access the scheduler yourself while it's closed to parents, check "**Allow Admins access to the CUI at all times.**"

2. View the scheduler

1. First, make sure that your [SSO](#) is set up and permits impersonation.
2. Log in to Blackbaud and under your profile menu select the Impersonate User option. Blackbaud will allow you to find a user to impersonate. Ensure that this user is in pickAtime as well (note that the User IDs in Blackbaud tell pickAtime what role that User has).
3. Once you are impersonating a user, go to the Resource Board.
4. Click the pickAtime Resource Tile to access the event.

3. Test the booking process

Ensure that you have a student attached to your test account to confirm that appointments can be booked correctly. To review your Parent-Student Relationship or if you need to manually add a student, follow the instructions [here](#).

1. Confirm the student's name appears in the drop-down list.
2. Select the student's name and continue through the scheduling process.
3. You'll see a list of all available appointment slots for that student's teachers.
4. Select a teacher and time to book and complete the process.

Recommended Testing Checklist

- Teachers imported correctly
- Classes imported correctly
- Student relationships are imported correctly
- Room assignments verified
- Appointment slots displayed correctly
- Parent scheduling tested
- Confirmation emails verified
- Virtual meeting links tested (if applicable)
- Reports reviewed
- Test appointments removed

Troubleshooting

Students' teachers aren't showing up

This usually means one of the following:

- The student's enrollment data is incomplete or missing
- No slots have been created yet for that student's teachers at this event

What does "the integration with pickatime is not set up correctly" mean?

This appears when you have added your vendor id # to the end of the secret key (located in Global Setup / Business, Show Advanced Options, Single Sign On Options, Blackbaud). The secret key should be empty after the ==.

What does "There was an error: Blackbaud user not found" mean?

This appears when pickAtime is not able to locate a user with a Blackbaud email within our Database. Users must exist in both pickAtime and Blackbaud with a matching User ID (parentID or teacherID). Check and confirm that the user exists in both systems and if they do confirm that their User ID data matches.

What does "Failed to get Blackbaud user" mean?

This appears when pickAtime is not able to communicate with BB communication. Please check and confirm that the user exists in both systems, and if they do confirm that the User ID data matches, try again.

Click [here for our full Blackbaud FAQ](#).

Blackbaud Management Guide

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Blackbaud FAQs

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