

Information for Previous Users

If you have previously created an account with pickAtime, you will not need to create a new account for new conferences. Once you log in to your account, you should create a new event on your account, for example, a "Parent Teacher Conferences 2026" event. Then you can delete the previous semester or the previous year's event. By creating the new event prior to deleting the old event, you will retain the settings (**UI Setup / Notification Setup / CUI Messages**) from your previous event.

Please do not simply rename your old event. Importing new class and enrollment data to an old event that has been renamed will add the new class and enrollment data to your previous year's class and enrollment data.

Deleting your old event will delete all class and enrollment data, so do not delete your old event if you will be reusing your previous class and enrollment data. To reuse your previous class and enrollment data, use the Duplicate PTA option on the Events page.

Contact Information

The contact information from your previous parent-teacher conference is retained in the pickAtime system and is not removed when you delete an event. **Contacts** are the parents, students, and teachers.

To remove all previous contact information, select the **Global Setup / Contacts** page, click on the Show advanced options... at the top of the page. You will see a button labeled "**Remove all customers.**" Selecting this button will bring up a pull-down that will allow you to delete your contacts based on their access level. The five access levels are:

Customer Access Only - parents and students

Admin Level - Appointment Viewer - teachers

Admin Level - Appointment Maker - any administrators with Appointment Maker access

Admin Level - Resource Administrator - any administrators with access to only a select group of Resources (teachers)

Admin Level - Event Administrator - any administrators with access to an Event or Events

Deleting an access level will delete the level that is listed above it in the list as well. For example, if you select Admin Level - Resource Administrator as your level to delete, it will also delete those with Admin Level - Appointment Maker, Admin Level - Appointment Viewer, and those with only Customer access (your parents). To remove your students, select the "**remove All students**"

option.

Note that removing the contacts will not remove any contacts who have logged in during the previous two months or any contacts who have created an appointment in the last two months. The "remove all contacts" will not remove any students who have enrollment in any events on your account.

IMPORTANT NOTE: If you have any changes to key fields (for example, if new teachers will be using departing teachers' teacherIDs), then you will also want to have your previous conference contact information deleted. Or if your student ID's have changed for each student, you will want to remove the stored students.

NOTE: Preventing Duplicate Contacts for Existing pickAtime Accounts

If your school has used pickAtime without integration, imported data files manually, and now wants to enable the Blackbaud integration, duplicate contact records may occur due to differing contact IDs (teacherID, studentID, parentID).

Recommendation: Clear old data before the new import.

Steps to remove old data:

1. Create a new event using a past event as a template to preserve settings, notifications, and appointment fields.
2. (Optional) Export reports from past events on the Reports page.
3. Delete all past events except the new one.
4. Go to Global Setup / Contacts / Advanced Options, then click Delete All Contacts. In the pop-up, select Level to delete: Admin Level - Event Administrator (this removes contacts with lower access level and contacts with customer access level - parents and students).
5. Run the new integration import.

This ensures clean data syncing without duplicates. Contact support@pickatime.com if needed.

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