Event FAQs

Account

How do I change the name of my account?

1. Go to **Global Setup / Business**.
2. At the top, select **Business Settings / Business Address / Business Name**.
3. Edit the account name.

> **Note:** The change won't appear immediately — log out completely and log back in to see the update.

Administrators

Can I have multiple administrators on my account?

Yes, you can set up any number of users with administrative access:

1. Go to **Contacts**, click **Add / Admin...**.
2. Fill in the contact's information.
3. Set **Admin Level** to **Administrator** for full access.

What administrative access levels are available?

Level	Permissions
Appointment Viewer	Can view appointments only
Appointment Maker	Can make appointments in the Admin tool, but cannot change account settings
Resource Administrator	Full schedule control for specific assigned resources
Event Administrator	Full administrative access to all events
Administrator	Full administrative access to the entire account

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"Email address already exists, can't create duplicates" — what does this mean?

This administrators email is already linked to an existing pickAtime contact. Go to **Contacts**, search the email address, and you should find the existing record.

Admin UI

Why is the Appointments List red?

This indicates appointments with an unresolved problem needing attention — the tab and the appointment both display in red. See the **Problem Appointments** page for the different ways this can happen.

I see orange appointments labeled "Customer is creating this appointment" — what do I need to fix?

Nothing — this is expected behavior. Orange indicates a booking **in progress**:

- These appointments can't be manually deleted or selected for email notifications.
- If the participant goes inactive without finishing, the system automatically cancels the in-progress booking.
- The orange status disappears once the participant completes booking.

> This also helps admins booking manually — it prevents you from selecting a slot a participant is actively booking.

Why does changing "Open scheduler to customers" on one event also change it on my other events?

Your events are linked via **Propagator Mode**. To make changes apply to only the current event:

1. Go to **Events Preview / Events Settings**.
2. Under **Propagator Mode / Propagate Changes To**, change the setting from **"all events of this type"** to **"only the current event."**

Appointments

How do I see who has signed up for an appointment?

Via Reports: Logging in takes you directly to the **Reports** area, where several reports show scheduled appointments.

Via Admin UI: Select your event, go to **Appointments**, and click a date/time — the participant's name will display in that slot.

Can I offer Virtual appointments part of the day and In-Person for another part?

Yes — create separate slots by type:

- **Virtual** slots for morning/early afternoon
- **In-Person** slots for evening

A participant booked the wrong appointment type (In-Person vs. Virtual). How do I fix it?

Option 1 — Participant self-service: They go to **My Appointments**, locate the booking, click **Edit**, and change the **Appointment Type**.

Option 2 — Admin:

1. Open the event and locate the resource/time slot.
2. Click the appointment, then **Edit Appointment**.
3. Change the **Appointment Type** and save.

How do I change ALL booked appointments from In-Person to Virtual (or vice versa)?

1. Open the event / **Event Management**.
2. Click **Slots / Update Slots**.
3. In the **Slot Updater**, set the time range and choose the new type from **Slot Type**.
4. Click **OK** — you'll see a confirmation showing how many appointments will be updated.
5. Click **OK** again to confirm.

Cancelled Appointments

Can I see a list of cancelled appointments for a specific participant?

1. Go to **Reports / Account Reports**.
2. Select **Cancelled Appointments**.
3. Sort by resource name to find all relevant appointments.

Contacts

Why are contacts shown in different colors?

Color	Meaning
Blue	Contact has never logged in / taken ownership of their account
Black	Contact has logged in
Red	Problem account — usually a duplicate email address

Emails

How do I customize emails?

Go to **Settings / Notifications** to customize the **Confirmation**, **Reminder**, and **Cancellation** email templates.

How can I view emails that have been sent?

1. Go to **Contacts** and search for the contact.
2. Select them, then click the small **Log** tab.

This shows a history of booked/cancelled appointments and emails sent.

How do I turn off reminder emails?

1. Go to **Event Management / Settings / Notification Setup**.
2. Under **Reminder Email**, uncheck **"Send Reminder Emails."**

> You can update reminder email **wording and timing** at any time — changes apply to all future reminders.

Invoices

How do I view my invoices?

1. Log in and select **Reports / Account Reports**.
2. Choose **Account / Invoices and Payments** from the report pull-down.
3. Click an invoice # to view details.

Can I pay by credit card?

Yes:

1. Follow the steps above to open an invoice.
2. Click **"Click Here"** within the report.
3. Select **Pay by Credit Card**.

Can you take my payment over the phone?

No — phone payments aren't supported. Please use the credit card option above.

Multiple Dates / Locations

Can I have multiple dates for one event?

Yes. Use the calendar on the left to create slots for your first date, then select a new date and repeat — no need to create a separate event per date.

Can I have multiple locations for one event?

Yes — create a **separate event** for each location on the **Event List** page.

Passwords

A participant can't remember her password.

- **Self-service:** Click **Forgot Password** on the login page to receive a reset email.
- **Admin reset:** Go to **Contacts**, search for the participant, select them, and click **Reset PW**.

How do I change my own password?

Log in, click the menu icon (top-right), then select **Edit Profile / Change Password**.

Scheduler

How do I add a logo to my scheduling site?

Go to **Global Setup / Business**, under **Account Level Settings / Account Logo**, and click the **Upload** icon.

Do you support Spanish/French versions of the scheduling page?

Not natively — your browser's built-in translation tool can be used instead.

How do I test the scheduler?

Go to your **Online Scheduling** link, add a student to your account, and view their teachers' schedules as a parent would.

I see "there are no events available" or "the online scheduler is closed" when testing.

The scheduler isn't currently open. Check **Settings / UI Setup / Scheduler Availability** start/end dates.

The scheduler is closed, but participants can still cancel — why?

This is expected. Once closed, participants can still log in and view (but not book) appointments. Whether they can **cancel** depends on the setting **"Customer cannot cancel their appointment closer than XX hours/days"** under **Settings / UI Setup / Appointment Cancellations**. If cancellation isn't allowed, they'll see a message to call the company instead.

Our account URL shows a 404 error during testing — how do we fix this?

This usually happens when **Category Sort** is enabled but no categories have been assigned to your events.

Fix:

1. Go to **Events Preview / Events Settings / Manage Categories for Events**.
2. Under **Category Sort**, uncheck **"Allow customer to select category first."**

Snow Days / Emergency Rescheduling

We need to cancel a day due to snow and move all appointments to a new date.

1. Go to **Appointments** for your event.
2. Select the date from the calendar.
3. Click **Slots / Move Slots**, then select a destination date.

You'll have the option to email all affected participants about the change.

Time Slots

I created slots with the wrong duration.

Slot duration **cannot be edited**. Delete the incorrect slots and recreate them with the correct duration.

> **If customers have already booked appointments on those slots:** When you delete the slots, you'll be prompted to either cancel the appointments (optionally with a rebooking email) or move them to a holding area on the **Appointments List** page for manual handling.

I created slots on the wrong date.

Use **Slots → Move Slots** on the Appointments page to move all slots (and any appointments) to the correct date. You can optionally notify affected participants by email.

My slots are 20 minutes, but I need a 30-minute break mid-schedule.

If the break doesn't align with your slot duration, create slots in two batches — before the break, then after.

Why are some slots yellow?

Yellow indicates the time has already **passed** — these slots are hidden from participants. Check the date and either delete or move them. Correctly dated slots appear **blue** and remain bookable.

Working in the Admin UI

The time slot boxes are too small — how do I adjust this?

- **Manually:** Hover over a time marker line in the left column, then click and drag to resize.
- **Globally:** Go to **Settings → Vendor View Setup** and adjust **Time Slot Display Scale**.

Date

I need to change my event date, but keep the existing appointments. How do I do this?

Yes — you can **move** your slots and appointments to the new date instead of recreating them.

1. Go to the **Appointments** page
2. Select the original date on the calendar (left-hand side).
3. Click **Slots / Move Slots**.
4. Select the new destination date.

You'll have the option to email participants notifying them of the change.

> **Note:** Moving slots does **not** automatically update the date listed on the **Event Setup** page — you'll need to correct that separately.