

Event Scheduling FAQs

Account

How do I change the name of my account

To change the account name, follow these steps in the **Admin UI**:

1. Navigate to the [Global Setup / Business Setup](#) page
2. At the top of the page, select **Business Settings / Business Address / Business Name**.
3. Here, you can edit the account name.

Please note: The name change will not be visible immediately. You must log out completely and then log back in to see the updated name.

Administrators

Can I have multiple administrators on my account?

You can set up any number of users with Administrative access. To do so, you would go to the [Contacts](#) page, select the Add > Admin... button, and then fill in the user information on the Add New Contact form. For a full-powered administrator in the Admin Level pull-down, select Administrator.

What Administrative Access levels are there?

- **Appointment Viewer** - allows a contact to view the appointments made. Teachers are generally assigned only this access.
- **Appointment Maker** - allows a contact to make appointments in the Admin tool, but not change any settings on the account.
- **Resource Administrator** - allows a contact to have administrative access to specific resources (teachers). This would give the contact the ability to edit the schedule for the resource.
- **Event Administrator** - allows a contact to have administrative access to all events.
- **Administrator** - allows a contact to have full administrative access to the entire account.

I'm getting the message "email address already exists, can't create duplicates" when I add a teacher's email address. What does this mean?

This means that the teacher's email address you added already exists with an account in pickAtime. In the **Contacts** page, search for the email address by entering it in the email box and pressing search. You should see that the teacher's email address already has an account in your Contacts.

Admin UI

Why is the Appointments List red?

This means that you have appointments that have some sort of problem that needs attention. When a problem appointment is created, the tab will turn red, and the appointment will be listed in red. There are several ways problem appointments are created. Please see the Problem Appointments page.

On the Appointments List page, I noticed orange appointments with the status 'Customer is creating this appointment'. What do we need to fix these?

Appointments that are in the process of being booked are displayed in orange on the Appointment List page and cannot be manually deleted or selected for email notification sending. These appointments will be automatically managed and, if necessary, canceled by the system if the user has been inactive for a long time and has not completed creating an appointment. Once the participant completes the appointment booking process and clicks on the Create Appointment button, the status will disappear.

This will allow admins who are booking appointments for clients in the Admin UI tool to not select the time slots that are in the booking process.

Every time I change the Open scheduler to customers on one of my events, why does it change this on my other events? Why are my events connected?

Go to the **Events Preview** page, select the **Events Settings** option, change the setting in the **Propagator Mode** section, under Propagate Changes to: from all events of this type to only the current event. This setting allows you to make changes to one event and not apply them to all your events.

Appointments

I would like to offer Virtual appointments for part of the day (e.g., morning/early afternoon) and In-Person appointments for another part of the day (e.g., evening). Can I set that up?

Yes, you can. Simply create separate time slots for each appointment type:

- Use the "**Virtual**" slot type for the morning or early afternoon hours.
- Use the "**In-Person**" slot type for the evening hours.

A participant accidentally booked an In-Person appointment but needs a Virtual one. How can we change the appointment type?

There are two options:

- **Participant:** They can go to the My Appointments page, locate the appointment, click Edit, and change the Appointment Type.
- **Admin:** In the Admin UI:
 1. Open the event.
 2. Locate the resource and the corresponding time slot.
 3. Click on the Appointment, then click Edit Appointment.
 4. Change the Appointment Type and save.

I want to change all booked appointments from In-Person to Virtual (or vice versa). How can I do this?

In the Admin UI:

1. Open the event.
2. Go to the **Event Management** page.
3. Click **Slots / Update Slots**.
4. In the Slot Updater pop-up:
 - Set the desired time range.
 - Choose the new appointment type from the Slot Type drop-down.
 - Click OK.
5. A confirmation message will appear, informing you how many existing appointments will be updated.
6. Click OK to proceed. All affected appointments will be updated to the new type.

Appointments List

Why is the Appointments List red?

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Canceled Appointments

Can I see a list of Canceled Appointments for a teacher?

To view canceled appointments: In the Reporting section, check the Account Reports radio button. Then select the report labeled Canceled Appointments. Click on the Additional report fields / Appointment Fields line to add Student and Teacher to the report. Click on the Additional report fields / Contact's Fields line to add Email to the report. You can sort by the teacher's name to locate all appointments for a teacher.

Contacts

Why are the contacts different colors?

Blue means that the contact (person) has never logged in and taken ownership of their account. Black means that the person has logged in. Also, we have contacts that are marked in red. Red means a problem account - usually indicating that the email address is a duplicate.

Emails

How can I view any emails that have been sent?

This can be viewed on the individual contact level. On the Contacts page, you can search for a contact by name. Then click on the contact, and then click on the small Log tab. This will show a log of appointments booked, canceled, and any emails sent.

How do I turn off my E-Mail Reminders?

To turn off your reminder emails, go to the **Events Management / Settings / Notification Setup** page, and under the Reminder email option, you will see a check box labeled " Send Reminder Emails". Uncheck this box.

E-Mail Reminders

We would recommend that you include a table of appointments within the body of the reminder emails. If you go into the **Settings / Notification Setup** page and select the Reminder email option, you will see a check box (above the body) labeled " Replace the Email Body with the Printable Schedule of Appointments". This will take the schedule of appointments (in a table format) and use this as the body of the reminder email. Any text you add in the Header will show up above the table of appointments.

The format of the printable schedule is set in the **CUI Messages / Print Schedule** section. This table does include the room number.

On the **Settings/UI Setup** page under the Customer Reminder Email section, you have checked the box to require a reminder. You also need to enter a number of hours (prior to each appointment) for which the reminder will go out. For the Automatic Reminder Email(s), select the

green + under the Send Reminder Emails and then enter the number of hours prior to the appointment you would like the email sent (e.g., 24, 48, etc.).

Can I change the time/verbiage of my reminder emails?

Yes, you can change the verbiage and add/remove the times of your Reminder Emails at any time. These updates will apply to all appointments.

Invoices

How do I view my invoices?

- Log in to your pickAtime account from our home page, the Login section.
- Check the radio button for Account Reports.
- Select the report labeled Account - Invoices and Payments from the Report pull-down.
- You will see a list of your invoices and any payments made.
- Click on an invoice # to see the invoice.

Can I pay my invoice by credit card?

- Log in to your pickAtime account from our home page, the Login section.
- Check the radio button for **Account Reports**.
- Select the report labeled **Account - Invoices and Payments** from the Report pull-down.
- You will see a list of your invoices and any payments made.
- In this report, you have to press on 'click here'.
- You will see the 'Pay by Credit Card' option.

Can you call me so I can pay your invoice?

We are unable to take payment over the phone. To pay by credit card, please see the instructions above.

Passwords

A participant called and can not remember her password.

On the login page, the participant can click on the Forgot Password button. A link will be emailed to the participant with instructions on resetting the password. Alternatively, you can reset the password for the participant in the Admin UI. Go to the Contacts page, search for the participant. Click on the participant's name and then click on the Reset PW button.

How do I change my password?

Log in to your pickAtime account. Click on the menu icon on the upper right-hand side, and then select the Edit Profile / Change password option

A participant is having trouble with her password.

Participants can click on the Forgot Password option, and they will get an email that will allow them to reset their password. They can also email support@pickatime.com to reset it as well.

Alternatively, in the Admin UI, you can reset the participant's password.

- In the Admin UI, select the Contacts tab
- Search by name for the participant in the Search Control boxes.
- When you locate the participant record, click on the record, and you will see the participant's email displayed in the middle section.
- Click on the Reset PW button.

Scheduler

Every time I change the Open scheduler to customers on one of my events, it changes this on my other events. Why are my events connected?

Go to the Events Preview page, select the Events Settings option, change the setting in the Propagator Mode section, under Propagate Changes to: from all events of this type to only the current event. This setting allows you to make changes to one event apply to all your events.

How do I add a logo to my scheduling site?

To add a logo to your scheduler, select go to the **Global Setup / Business page. Under the Account Level Settings / Account Logo**, click on the Upload icon to upload your logo.

Do you have a Spanish/French version of the scheduling page?

You can use your browser to translate your page. Review our [instructions](#) on how to do this.

How do I test out the scheduler?

Go to the Online Scheduling link. This will take you into the Online Scheduler. You can add any student to your account and then view the schedule for the students' teachers.

When I try to test out the site, I see a message that says "there are no events available" or "the online scheduler is closed."

This means that you have not made the site available for appointment taking. In the Settings / UI Setup page, check the start date and end date of Scheduler Availability. In order to view the scheduler, the site must be open for appointment taking.

Our scheduler is closed, but our participants could still cancel.

When the scheduler closes, if the link is still available (either on your website or bookmarked by the participant), participants can still log in and view their schedule. They are not able to book any appointments.

Depending on your cancellation settings, they can still cancel an appointment. This is determined by the setting customer cannot cancel their appointment closer than xx hours/days. This setting is on the **Settings / UI Setup** page, Appointment Cancellations section. If participants are not able to cancel, then a message displays that they should call to cancel.

I am attempting to use the site, and it is saying I was recognized as a bot.

We use Google reCAPTCHA on our sign-up pages to detect and prevent spammers and other automated systems from overloading our systems. This detection is based on a number of factors and is an automated process that runs in the background. You'll see the message on the screen:

"This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply." — in accordance with Google's requirements.

Occasionally, this system can have a "false positive." We recommend the user try again by refreshing the page or doing a hard refresh. To hard refresh the page, press Cmd + Shift + R on a Mac, or Ctrl + Shift + R on a Windows computer.

We created our event, and while testing, noticed that when we click on the account URL, there is a 404 error message. How do we resolve this asap?

If you encounter a 404 Error page when testing your event, it is likely because the "Category Sort" option was activated, but no categories have been assigned to your events. To resolve this, please follow these steps to disable the setting:

1. Navigate to Events Preview / Events Settings / Manage Categories for Events.
2. Under the Category Sort section, uncheck the option 'Allow customer to select category' first.

Once this setting is disabled, your event link should function correctly.

Snow Day

We have an event that we need to cancel on account of a snow day. We would like to move all appointments to a new day.

In the Admin UI, go to the Appointments page for your event. Select the date of appointments from the calendar on the left-hand side. Click on the Slots / Move Slots option. Here you will be able to move all slots and appointments to a new date in the future. You will be prompted to select a destination date. You will have the option to send an email to all participants with appointments.

Time Slots

I created time slots with the wrong duration.

Time slots can not be changed from one duration to another. If you need a different duration than what you originally created, you will need to delete your time slots with the incorrect duration and create new time slots with the correct duration.

I created slots on the wrong date?

On the Appointments page, select the Slots drop-down and then select the Move Slots option. This will allow you to move all slots (and any appointments) to a new date. You will have the option to send an email to any appointment that is being moved.

My slots are 20 minutes in duration, but I want a 30-minute break in the middle.

If your break will not have the same duration as your slots or is not a multiple of your slots (e.g., you have slots of 20 minutes, and you want a 30-minute break), you will need to create your slots in sections. First, create the slots BEFORE your break time, and then create your slots AFTER your break time.

Why are some of my time slots yellow?

PickAtime automatically displays older Time slots in yellow to indicate that the scheduled time has already passed. These slots will not appear to your participants. Check the date of the slots, and either delete them or move them to the correct date. Slots on the correct date will be blue and will allow you to book and block.

I created time slots with the wrong duration, but my customers have already booked appointments.

Time slots can not be changed from one duration to another. If you need a different duration than what you created, you will need to delete your time slots with the incorrect duration and create new time slots with the correct duration. When you delete the time slots, the system will ask you what you want to do with the appointments. You can cancel them and send an email to each customer requesting that they rebook their appointment. Or you can put the appointment “on hold” and then cancel and manually rebook each appointment.

After selecting the Delete Time Slots option, you will see a new dialog box telling you the number of appointments on your soon-to-be-deleted slots.

The default option is set to move the appointments to a holding area on the **Appointments List** page. If you choose this option, you will have a list of the appointments that you need to either cancel or cancel and rebook.

Working in the Admin UI

Help! The time slot boxes in the Admin UI are really small. How can I adjust this?

Put your cursor on the line indicating the time on the left-hand column. You can then stretch or shrink the size of the boxes. Alternatively, you can go to the Settings / Vendor View Setup page and adjust the Time Slot Display Scale.

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