Event Setup Guide

Admin UI Overview

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.

- **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, Participants).
  - Participants: View scheduled appointments, history logs (bookings, cancellations, emails sent), or manually reset participant passwords.
  - Administrators: 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 company name, address, and core account settings.
  - **Contacts**: Create custom prompts and forms for participants 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.

Checklist

To set up your event using the Normal event scheduler, follow these steps:

1. **Create Your Account** **and** **Create Your Event** Create your event and give it a clear, descriptive name (e.g., "Health Screenings" or "Photo Shoot Appointments").
2. **Add a Resource** Add a resource — the "holder" of your time slots. A resource can be a specific person, or a generic entity like "Nurse" or "Appointments."
3. **Create Slots for the Event** Create your time slots, including dates, times, and appointment durations.
4. **Configure Settings**
   - **Appointment Settings** — Adjust various settings specific to your event.
   - **Configure Notifications** *(optional)* — Customize the default email confirmations and reminder notices, if needed.
5. **Try It Out** Test your scheduler before opening it to participants.

Event Setup

STEP ONE: Create Event

Create Your Organization's Account

If you haven't already created your organization's account, click here.

Steps to Create a New Event

1. Select **Events / Preview** from the sidebar.
2. Click the green **Add** button.
3. Enter a name for your event — e.g., `Health Screenings, Photo School 2026`.
4. Select the event type: **Normal**.
5. Select your event's **time zone**.
6. *(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 event 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 **Notification Setup** templates to automatically pull in this text.

STEP TWO: Add a Resource

Defining Your Resources

Every event requires at least one **Resource** — the "container" that holds your time slots.

Step 1: Name the Resource

Click directly into the **Title Area** of a new resource to edit its name.

Step 2: Choose a Descriptive Name

Use a name specific to your event type:

Event Type	Example Resource Name
Health Clinics	"Flu Shots" (service name)
Counseling/Advising	"Sarah Jenkins" (staff member's name)
Facility Rentals	"Main Gymnasium" (room or equipment name)

Step 3: Add Additional Resources

If your event involves multiple staff members, rooms, or service types, continue adding resources as needed. **Each resource manages its own independent set of appointments.**

STEP THREE: Create Slots

To get started, go to **Events / Preview**, select your event, then click 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 Resources to Create Slots For

In the slot generator, choose to create slots for **selected resources** or **all resources**. To select multiple resources, 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	Participants receive room/location info	P
Virtual	Participants receive a meeting link	V
In-Person or Virtual	Participants 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 participants; visible in Admin UI only
Shown with "Call" Status	Visible to participants, 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 participants/families can book the same time slot.

Creating Slots for Multiple Days or Resources

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 resource	Select a resource (or group), create their slots, save, then repeat for the next resource/group

> **Tip:** If you created identical slots for all resources at once, individual slots won't display until you click a specific resource's name in the right-hand pane

Updating Existing Slots

Use **Update Slots** to change existing slot characteristics without deleting and recreating them.

To access: Appointments → select date/resource → 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.)

> **Important:** Update Slots does **not** change start times, end times, or duration. To change those, you must delete and recreate the slots (see *Changing Slot Duration or Times* below).

"Keep existing slot type on slots being updated" — useful when resources 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 → select date/resource → 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 participants 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 snow closures, rescheduled days, or resource availability changes.

To access: Appointments → select date/resource → Slots → Move Slots

In the dialog, select the destination date, choose whether to move slots for all resources or selected resources, and confirm.

Existing appointments transfer with all participant information intact, and appointment **times remain the same**.

> **Important:** Calendar notification emails are **not** sent automatically — advise participants 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 resource — **without** copying existing appointments.

To access: Appointments → select date/resource → Slots → Copy Slots

Select the destination date and/or resource(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**

Situation	Use
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 resource	**Copy Slots**
Change slot duration or times	**Delete + Recreate**

Slot Color Guide

Color	Meaning
□□ Blue	Available
□□ Red	Blocked
⚬ Grey	Resource is booked elsewhere (team meeting or personal appointment)
image.png Yellow	Time has passed

FAQ on Creating Slots

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 holder whose appointment was moved.

My slots are 20 minutes in duration, but I wanted a 30-minute break for lunch

If your break will not have the same duration as your slots or is not a multiple of your slots (e.g., you have time slots of 20 minutes, and you want a 40-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 my time slots yellow?

Yellow indicates that the time has passed.

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 originally 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 appointments "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.

STEP FOUR: Adjust Settings

Online Scheduler Settings (Event Scheduling)

Booking Settings

Booking Window

Booking Opens	Select the date and time you would like the scheduler to open for participants.
Booking Closes	Select the date and time the scheduler should close and no longer accept bookings.
Admins can access the scheduler at any time	Check this to ensure Administrators can access the scheduler even when it is closed to the public.

For schedulers with multiple booking dates, close booking:

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

Booking Limits:

Maximum per Event	Sets a total limit on the number of appointments allowed for the entire event. Set to 0 for no limits.
Maximum Per Child	Sets a cap on the number of appointments allowed for each individual student. Set to 0 for no limits.

Duration between appointments	Enter a duration to prevent customers from booking too frequently. If a customer attempts to book within this window, they will see your custom "Cannot Book" message.
per resource	Restricts the frequency of bookings with a specific staff member or room. Select this to allow customers to book again quickly as long as they choose a different resource.

Cancellation Policy

Customer may cancel their appointment up to **XX hours/days/weeks.**	Use this setting to prevent participants from cancelling their appointments within a specific timeframe (hours, days, or weeks) before the scheduled start time. Set this value to 0 if you wish to allow cancellations up until the last minute. Conversely, a very high value effectively disables the cancellation option for participants. Note: Closing the scheduler only prevents new bookings; it does not stop participants from cancelling existing appointments unless this lock-out period is active.

Share Your Scheduler

Scheduling Link

Account Scheduling Link	Displays all available events on the scheduler. If you have only one open event on the vendor account, we recommend that you use the Scheduling link for the account.
Event Scheduling Link	Displays the scheduler of the selected event with the ability to select other available events on this account.
Customize the event link	Allows you to customise the scheduling link for the selected event parameter.
Scheduling link for the category	Displays the scheduler with the list of event(s) of the selected category.

Display Settings

Scheduler Display

Display Scheduler in a: date, text, list, vertical, table format	[There are five ways you can display your slots.](#) 1. Table * This is the only option for PTA events. 2. Text 3. List 4. Vertical 5. Date
Display calendar to navigate over dates	Displays a calendar interface to help users browse different dates easily.
Display paginator to navigate over dates	Allows to display of multiple dates with slots on one page.
Shows end times	Displays the end time of the slot.
Show Number of Available Openings	Show the number of appointment slots for the appointment time.
Display X weeks/days of slots on the scheduling page with a max capacity of XXX slots per day	Determines the volume of days or weeks visible to the customer at one time.
Display X days of time slots	Enter a value here if you would like to display only a certain number of days/weeks/months to your customer.
Limit visible openings to x per slot and reveal the next available slot when xx% of slots are booked	This will allow you to initially display only part of the available appointments per slot on the online scheduler. You can set the number of slots you would like initially to show up on the scheduler. The default is set to 100%, but can be adjusted. Once your selected % of slots is booked, the rest will open up.

Resource Display

Note: different options will appear depending on the selected scheduler display format

Hide resources on the Scheduling Page	When using the Text, Vertical, or List displays, these options appear to allow you to show or hide the resources for your participants.
Resource selection format (only active if the resources are NOT hidden):	When using the Text, Vertical, or List displays, you can opt to show the resources in a drop-down, vertically or as buttons.
Custom label for Resource	Create a custom label for Resource
Display resource description	When using the Table or Date display, you can add the description to the resource’s legend on the CUI.
Display room	When using the Table or Date display, the scheduler will show the Room value on the scheduler in the list of resources, next to the resource’s name.

ADVANCED SETTINGS

Online Meeting Provider	Select the integrated video conferencing tool (Zoom, Google, MS Teams) to be used for virtual appointments.
Multiple Appointment Booking	
Allow customers to take multiple slots	This allows your customer to book more than one slot per appointment time.
Allow overlapping appointments	Enables customers to book multiple appointments that occur at the same time.
Appointment Changes	
Allow customers to see and cancel past appointments	Permits users to view their history and manage appointments that have already passed.
Don't allow customers to change appointment time	Removes the ability for participants to reschedule their existing appointment times.
Appointment Limit for Resources: A resource is whoever or whatever holds the slots - staff, a room, or any entity you choose.	
Maximum appointments per resource per day	Limits how many appointments a single resource (e.g., a teacher) can accept daily, regardless of total available slots. Set to 0 for no limits.
Student Selection	Require parents to select their student's name from a dropdown menu. (Note: This requires student data to be imported first.)
Allow customers to select a timezone from the list of allowed timezones	Check if you want to display a drop-down of time zones to your customers so that they can change the timezone they can view and book their slots in.

Notification Setup

The **Notifications** 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

Field	What it controls
Body	Main email text
Send Confirmation and Cancellation Emails	Sends a confirmation after booking *(typically left unchecked for schools)*
Support Email	Address that receives replies to confirmation/reminder/cancellation emails. If left blank, replies get an automated response directing them to contact your organisation.

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.

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)

Configure CUI (Customer User Interface)

You can customise most of the text and labels participants see when booking appointments.

To edit CUI messages:

1. From the Admin UI, go to **Events / Preview**, select your event, and click **Go To**.
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.

STEP FIVE: Try it out

1. ## 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/Booking Window**.
    3. Set **"Open scheduler to customers on"** and **"Close scheduler to customers on"** to define the window during which participants can book appointments.

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2. View the Scheduler

1. Go to **Global Setup / Business / Account Level Settings / Account URL**, and find your **Account URL** at the bottom of the page.
2. Click the URL, or copy it into another browser window to test the scheduler as a participant would experience it.

    > You can customize this URL by checking **"Set Custom URL"** and entering your preferred name. The updated URL will be live in approximately **5–10 minutes**.

Previous Users of pickAtime

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., "Health and Wellness 2026").

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.

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

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 **Resource** 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 login credentials — is **retained across events** and is **not deleted** when you delete an event. This means:

- Participants can log back in with their original email and password.
- Participants who've forgotten their password can use **Forgot Password** on the login page.

If you'd prefer participants 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	Participants
Appointment Viewer	Admins who only need to see event reports
Appointment Maker	Admins with Appointment Maker access
Resource Administrator	Admins with access to a select group of Resource
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 (Participants).

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**