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 **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 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 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 (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**

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