Appointments File

Importing Appointments

To add Appointments, you first need to import a People file (see "Importing People"). The People file must have a unique identifier for each person. After importing your People file, you can import an Appointment file. The Appointment file must reference the person identifier you previously imported in the People file import.

> **IMPORTANT NOTE**: Appointments can only be imported for Normal event types, not PTA or Simple PTA event types.

1 - Create Your Appointments File

This file lists the appointments to be imported.

Required fields:

- **ID**: Identifies the person; must match an existing contact person ID
- **EventID**: Event ID # for the event (found under Reports > Settings)
- **Resource**: Name of the resource (e.g., Nurse, Health Screenings)
- **Date**: Date and time of the appointment (e.g., 3/4/09 10:00 AM)

> Optionally include additional appointment fields by adding columns. Column headers must match the appointment field titles in the event's Appointment Fields tab.

TEMPLATE:

ID	EventID	Resource	Date
12345	6789	Nurse	3/4/09 10:00 AM
67890	6789	Health Screening	3/5/09 1:30 PM

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at pickatime.com
2. Select Importer
3. Select Data Type: Appointments
4. Select ID for the Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

3 - Confirm the Appointments in the Admin UI

1. Open the Admin UI
2. You will see a red Appointments List for the imported appointments
3. Click an appointment, then click Confirm Appointment
4. This will remove the red color and finalize the slot booking

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Importing Appointments with SMS Reminder

Before beginning, make sure your account is activated for SMS reminders (contact support for activation; additional charges apply).

This process lets you import appointments and send SMS reminders.

1 - Create Your Appointments File

Required fields:

- **ID**: Must match existing person ID
- **EventID**: Event ID # (found in Reports)
- **Resource**: Resource name (e.g., Nurse)
- **Date**: Appointment date and time (e.g., 3/4/09 10:00 AM)
- **Phone**: Phone number to receive SMS reminder
- **TimeToRemind** (optional): Minutes before appointment to send reminder (e.g., 720 for 12 hours; defaults to 1440 = 24 hrs if blank)

TEMPLATE:

ID	EventID	Resource	Date	Phone	TimeToRemind
12345	6789	Nurse	3/4/09 10:00 AM	1234445577	60
67890	6789	Health Screening	3/5/09 1:30 PM	(123)4445577	120

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at pickatime.com
2. Select Importer
3. Select Data Type: Appointments
4. Select ID for the Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

3 - Confirm the Appointments in the Admin UI

1. Open the Admin UI
2. You will see a red Appointments List for the imported appointments
3. Click an appointment, then click Confirm Appointment
4. This will remove the red color and finalize the slot booking

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Importing Appointments with Price

Before starting:

- Ensure the event has "Allow to pay later" enabled
- This allows imported appointments to be unpaid, and participants can pay through the online scheduler in Your Schedule

1 - Create Your Appointments File

Required fields:

- **ID**: Person ID (must match imported People ID)
- **EventID**: Event ID # (found in Reports)
- **Resource**: Resource name (e.g., Nurse)
- **Date**: Appointment date and time (e.g., 3/4/09 10:00 AM)
- **Price**: Fee to be paid (e.g., 1, 1.5, 20, 2.8 in USD)

TEMPLATE:

ID	EventID	Resource	Date	Price

12345	6789	Nurse	3/4/09 10:00 AM	20
67890	6789	Health Screening	3/5/09 1:30 PM	15.5

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at www.pickatime.com
2. Select Importer from the navigation bar
3. Select Data Type: Appointments
4. Select ID for Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

> Tip: To encourage participants to log in and pay, mention payment instructions in the confirmation/reminder emails. This can be enabled during the import process by checking Send Confirm Email.

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