




Setting up and using Microsoft Teams

There are two ways to use MS Teams with pickAtime

Option 1: Enable MS Teams Integration (Auto-Generated Unique Links)

Each appointment receives a unique MS Teams link that is automatically generated and sent to both parent and teacher. Please ensure that Microsoft Teams is enabled for your organization's users; otherwise, virtual meetings won't be created.

Setup Steps

1. Sync Calendar with Outlook. Teachers manually sync via the Calendar Sync page in the pickAtime Admin UI. To sync your MS Calendar, do the following: 
2. Go to the Calendar Sync and click the 'Sign in to [Outlook.com](https://outlook.com)' button.
3. Accept the permissions for Outlook
4. 
5. Select your calendar and click 
6. Enable MS Teams
7. Go to [Settings / UI Setup](#) / Advanced Settings.
8. Under Online Meeting Provider, select MS Teams.
9. Use Virtual Appointment Types
10. MS Teams links are only generated for appointments of type Virtual or Virtual/In-Person.
11. Email Configuration
12. Go to Settings / Notification Setup.
13. Check the Send confirmation email option.
14. Enable "Insert Printable Schedule as Body" to include the \$(ROOM) macro (MS Teams link).
15. Optionally, you may need to change the virtual event column header to say MS Teams.
16. Customize Calendar Notifications

17. To edit the details of the notification that the parent/participant receives in their calendar, go to the Settings / Notification Setup page. Select Calendar Event Notification, and then you can edit the Title (this is the header), the Description (the message in the calendar), and the Location*.
18. To edit the details of the notification that the teacher/provider receives in their calendar, go to the Settings / Notification Setup page. Select the Resource Notification Email, and then you can edit the Subject and the Confirmation Email Body.



Notes

You need to have a Microsoft Business Account and an MS Teams License for Teachers

- Teachers must have a Microsoft Business account and an active MS Teams license within their organization.
- To verify and activate the MS Teams license:
 1. Sign in to <https://admin.microsoft.com/>.
 2. On the homepage, go to the Users section and select the teacher's account.
 3. Click More actions and choose Manage product licenses.
 4. In the Licenses and Apps window, ensure the MS Teams app is checked under Apps.
 5. If MS Teams is unchecked, activate it and click Save Changes.

Additional Notes

- Parents must log in to MS Teams to join meetings.
- For updating time zones, contact support@pickatime.com to request a 'Force Update Appointments'.
- Until a real MS Teams link is generated, a placeholder 'pickAtime' link appears.

Online Meetings Page Guide

This page helps Admins monitor the status of MS Teams link generation and teacher calendar syncs. It's essential when using the MS Teams Integration to ensure every virtual appointment is properly linked.

Sections on the Online Meeting Page

1. Online Meeting Sync

- Shows appointments with still generating MS Teams links.
- Note: Link generation may take up to 40 minutes.
- The links will disappear from this section once the link is created and detected.

Online Meetings Sync ▼

Meeting links are still being generated for the appointments below. Links can take up to 40 minutes to appear — this table refreshes automatically.

Provider	Appt Date	Dur	First Name	Last Name	Event	Resource
total: 0 rows/pg: <input style="width: 50px;" type="text" value="20"/>						

[Hide Online Meetings Sync...](#)

Online Meeting Issues ▼

The resources and their appointments below are missing meeting links. To resolve:

- **Google Meet:** Ensure the teacher has synced their Google Calendar
- **Zoom:** Review your Zoom settings or our FAQs for Zoom

Provider	Event	Resource	Contact	Contact Email	Export Setup	Action
total: 0 rows/pg: <input style="width: 50px;" type="text" value="20"/>						

Provider	Appt Date	Dur	First Name	Last Name	Event	Resource
total: 0 rows/pg: <input style="width: 50px;" type="text" value="20"/>						

2. Online Meeting Issues

- Lists teachers/resources that do not have meeting URLs.
- The system will give the relevant meeting information while also offering action steps

3. Calendar Link Setup Status

Calendar Sync Setup Status

Q Search Resources

Event:

Resource:

Contact:

only resources without Export setup

only resources without Import setup

This table displays the online meeting sync status for each resource.

- A checkmark under Export Setup means the resource/teacher has successfully synced their calendar with PickAtime.
- A checkmark under Import Setup means their external calendar is blocking off unavailable times in pickAtime.

Note: Blocking time from an individual teacher's external calendar is not recommended for PTA events.

Provider	Event	Resource	Contact	Contact Email	Export Setup	Import Setup	Action
Outlook	Maypine PTA-Duplicate	Abelle, Peter;Alvarez, John;Alvarez, Michael	John Alvarez	teacherAlvarez@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Abelle, Peter;Alvarez, John;Alvarez, Michael	Michael Alvarez	Alvarez@blackbaud.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Abelle, Peter;Alvarez, John;Alvarez, Michael	Peter Abelle	Student2a@blackbaud.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Bailes, Karen	Karen Bailes	TestBailes@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Cicora, Tara	Tara Cicora	taracicora@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Prince, Susan	Susan Prince	SusanPrince@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>
Outlook	Maypine PTA-Duplicate	Admin, pickAtime	pickAtime Admin	support@pickatime.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Login As"/>

This section will show you if the teacher has synced their account or not and offers you the option to log in as the teacher directly from this page.

Export Setup

- Checked when:
 - The teacher has synced the MS Calendar account on the Calendar Sync page in the Admin UI.
 - Selected a default calendar.
 - Clicked Save and Sync.
- Missing check = Teacher has not completed calendar sync.

Import Setup

- Checked if the teacher opted to block off times in pickAtime from MS Calendar.
- Not recommended for teachers.

Important Admin Tips

- Teachers must have a Resource assigned to their contact records and time slots with the appointment type virtual created to appear on this page.
- After enabling the Online Meeting Provider: MS Teams, always check the Online Meeting Links page (left-handed dashboard).
 - Use it to identify any missing URLs and verify teacher sync status.
- If links don't generate after 40 minutes, confirm:
 - The teacher has completed sync (Export Setup is checked).
 - The appointment was created as Virtual or Virtual/In-Person.

Still No Link?

It might be due to:

- The time zone was recently changed
- There's an error in the system

Contact: support@pickatime.com

Option 2: Use Static MS Teams Links in the Room Field

Each teacher reuses a single MS Teams link for all appointments.

Setup Steps

1. Generate an MS Teams link manually.
2. Add the link to the Room field:
 - On the Appointments page, next to the teacher's name.
 - Or, import via spreadsheet (Room column).
3. Confirm links start with `https://` so they are clickable.

Email Configuration

- On the Email and SMS Setup page:
 - Check “Replace the Email Body with the Printable Schedule of Appointments” to include the \$(ROOM) macro (MS Teams link).

Important

- DO NOT enable the MS Teams Integration (Online Meeting Provider = MS Teams). Doing so will override your manual Room links with auto-generated ones.

Revision #3

Created 2026-04-10 21:10:15 UTC by Tara Cicora

Updated 2026-05-26 21:40:17 UTC by Tara Cicora