

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, Teachers, Parents, and Students).
 - **Students:** View their enrolled classes.
 - **Parents:** View scheduled appointments, history logs (bookings, cancellations, emails sent), or manually reset parent passwords.
 - **Teachers:** View and adjust administrative access levels.
- **Importer:** Upload your roster and data files.
- **Global Setup:** Manage your sitewide configurations across two tabs:
 - **Business Setup:** Update your school's name, address, and core account settings.
 - **Contacts Setup:** Create custom prompts and forms for parents 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.
-

Revision #4

Created 2026-04-06 21:04:27 UTC by Tara Cicora

Updated 2026-05-22 23:04:49 UTC by Anne Taves