Quick Start Guides

pickAtime Quick Start Guides are step-by-step setup resources designed to help schools, districts, and organizations quickly launch and manage their scheduling events.

- Quick Start Guide: Summer School & Camp Scheduling
- Quick Start Guide: Athletic Event & Tryout Scheduling

Quick Start Guide: Summer School & Camp Scheduling

This Quick Start Guide walks you through setting up summer scheduling events in pickAtime, including Summer School, Camps, Enrichment Programs, Athletic Programs, and other roster-based events.

Overview

In this guide, you will learn how to:

- Create your pickAtime account
- Navigate the Admin UI
- Create and configure an event
- Customize your scheduler settings
- Preview and publish your online scheduler

Terms

- **Account** - an account will hold your events. You may have only one event on your account, or you may have multiple events. You may also have multiple accounts with us. Each account has a unique scheduling URL that you can provide to your customers.
- **Event** - an event that you create on your account. An event can span multiple dates. An event can represent one location or one type of appointment
- **Admin UI** - the Administrative User Interface, this is the tool where you will set up and manage your event
- **CUI** - the Customer User Interface or Online Scheduler. This is the unique link that your customer will log in to in order to book their appointments.

Getting Started

Create Your Account

To get started:

1. Visit pickAtime
2. Select **Sign Up Now**
3. Complete the registration form
4. Log in using your email address and password

Once logged in, you will enter the Admin UI.

Navigating the Admin UI

The navigation menu on the left side of the Admin UI provides access to your account settings and events.

Account-Level Navigation

These sections manage settings across your entire account:

- **Events** — Create and manage events
- **Appointments List** — View scheduled appointments and registrations
- **Contacts** — View participant contact information
- **Global Setup** — Configure account-wide settings

Event-Level Navigation

After selecting an event, you will have access to event-specific settings:

- **Roster Editor** — Manage registrations and participant rosters
- **Settings** — Customize scheduler behavior, appointment fields, emails, and display options

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Step-by-Step Setup

Step 1: Create Your Event

1. In the Admin UI, select **Events**
2. Click **Add Event**
3. Enter an event name
   Examples:
   - Summer School
   - STEM Camp
   - Basketball Camp
   - Academic Enrichment

4. Configure the following:
    - **Type:** Roster
    - **Template Event:** Roster Template
    - **Time Zone:** Select your local time zone
5. Optionally:
    - Add date labels
    - Add location information
    - Create separate events for different campuses, sessions, or grade levels
6. If you need to collect participant information, configure your Appointment Fields.

Step 2: Configure Event Settings

1. Select your event
2. Open the **Settings** tab
3. Select **Online Scheduler Settings**

Configure the following:

- Start Date for registration availability
- End Date for registration availability
- Appointment or roster display options
- Capacity limits and scheduling preferences

Additional settings can be reviewed by selecting the help icon next to each option.

Step 3: Preview Your Scheduler

Option 1: Direct Sidebar Access

Click the **Online Scheduler** button on the Admin UI sidebar. This will open the scheduler in a new tab.

Option 2: Using the Account/Event URL

Navigate to the **Event Management/Settings/Online Scheduling Settings/Share Your Scheduler / Scheduling Link** section to locate your **Account URL**.

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.

- **Testing:** Click the link or copy and paste it into a different browser window to experience the site as a customer.
- **Customization:** You can personalize this link by navigating to the **Global Setup / Business** page, checking the **Set custom URL** box, and entering your preferred name (e.g., `pickatime.com/YourSchoolName`).

Your participants will use this link to register for programs and appointments.

Frequently Asked Questions

Q: Can I manually add a student or camper to a session?

A: Yes. Go to the **Roster Editor**, click the **Add Participant** icon (represented by a person with a green $+$ sign), and enter their information.

Q: How do I change or add the question fields parents fill out during registration?

A: Go to **Settings** / **Appointment Fields**. Then:

1. Add the Field: Type the name of the information you want (e.g., "Phone Number") into the Add New box and click add.
2. Activate the Field: The new field will appear in the Available Fields section. Click the < button to move it into the Included Fields column.
3. To create a drop-down list or multiple-choice options (e.g., T-Shirt Size: S, M, L), change the **Type** column dropdown to **Choice**. Enter your options in the question editor box below and click **Add New** for each response. Use the **<>** arrows to change their order.

Q: How do I add our school or district logo to the scheduler?

A: Go to **Global Setup / Business, Account Level Settings, Account Logo.** Then:

1. Click on the upload button.
2. You will then see a pop-up File Manager window, where you can choose a File on your PC and click the Upload button.
3. Crop your image (if needed). Once you have finished cropping, click 'OK.'
4. Your logo is now displayed on your account.

Q: Can I customize the automated emails sent to parents?

A: Yes. Navigate to **Settings/Notification Setup**. From here, you can completely customize your **Confirmation**, **Reminder**, and **Cancellation** emails.

Q: How do I collect registration fees or tuition?

A: Go to **Settings** /**Credit Card Setup**. pickAtime securely integrates with **MySchoolBucks, Authorize.net, Stripe, and PayPal**. For more details, visit our dedicated Payment Options documentation.

Q: A camp session is full, but I want to squeeze in a few more participants. How do I do that?

A: You can change capacity limits on the fly. Go to the **Roster Editor** page for that event and increase the **Max Roster Size** to your new desired limit.

Q: How do I run reports to see who has signed up?

A: When you first log into pickAtime, you will land in the **Reporting** area. You can view real-time rosters and download various custom appointment reports.

Need More Help?

- **Phone Numbers & Custom Info:** Review our guide on *Collecting Information from your Participants* to add custom fields like emergency contact phone numbers.
- **Detailed Instructions:** Click the **User Manual** link on your main navigation panel and jump to the **Roster Scheduling** section.
- **Support Team:** Email us directly at **support@pickatime.com** for personalized assistance.

Quick Start Guide: Athletic Event & Tryout Scheduling

Use pickAtime Rostering to organize athletic registrations, tryouts, evaluations, camps, and team sign-ups — all from one easy-to-manage online scheduler.

This guide walks you through creating and publishing an athletic event registration system for schools, districts, leagues, and sports programs.

Overview

In this guide, you will learn how to:

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- Navigate the Admin UI
- Create and configure an event
- Customize your scheduler settings
- Preview and publish your online scheduler

Terms

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- **Global Setup** — Configure account-wide settings

Event-Level Navigation

After selecting an event, you will have access to event-specific settings:

- **Roster Editor** — Manage registrations and participant rosters
- **Settings** — Customize scheduler behavior, appointment fields, emails, and display options

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Step 1: Create Your Athletic Event

1. Select **Events**
2. Click **Add Event**
3. Enter your event name

Examples:

- Football Tryouts
- Youth Soccer Camp
- Volleyball Open Gym

- Basketball Skills Clinic
- Cheerleading Evaluations

4. Configure the event:
   - **Type:** Roster
   - **Template Event:** Roster Template
   - **Time Zone:** Select your local time zone
5. Optional setup:
   - Add location details
   - Create separate events by age group, grade, or team level
   - Add session labels or program dates

Step 2: Configure Registration Settings

Open your event and navigate to:

Settings > Online Scheduler Settings

Recommended settings include:

- Registration start and end dates
- Maximum roster size
- Waitlist options
- Registration availability windows
- Participant display settings

Tip: Use the help icon (?) next to any setting for additional details.

Step 3: Collect Athlete Information

To collect player details, waivers, or emergency contacts:

1. Go to:
   Settings > Appointment Fields
2. Add custom fields such as:
   - Athlete Name
   - Grade Level
   - Parent/Guardian Contact
   - Emergency Phone Number
   - T-Shirt Size
   - Medical Information
   - Liability Waiver Agreement
3. Choose the appropriate field type:

- Text Field
- Dropdown
- Radio Button
- Checkbox

Step 4: Customize Notifications

Navigate to:

Settings > Notification Setup

Customize:

- Registration confirmations
- Reminder emails
- Cancellation notices

You can include:

- Tryout instructions
- Arrival times
- Equipment requirements
- Facility directions

Step 5: Preview & Publish Your Registration Page

Open the Scheduler

Select the **Online Scheduler** button from the Admin UI sidebar.

Share Your Registration Link

Option 1: Direct Sidebar Access

Click the **Online Scheduler** button on the Admin UI sidebar. This will open the scheduler in a new tab.

Option 2: Using the Account/Event URL

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- **Customization:** You can personalize this link by navigating to the **Global Setup / Business** page, checking the **Set custom URL** box, and entering your preferred name (e.g., `pickatime.com/YourSchoolName`).

Your participants will use this link to register for programs and appointments.

Managing Registrations

View Athlete Rosters

Use the **Roster Editor** to:

- View registrations
- Add or remove participants
- Adjust roster limits
- Monitor capacity in real time

Run Reports

The Reporting area allows you to:

- Export athlete lists
- View registration totals
- Print rosters
- Track attendance

Frequently Asked Questions

Can I manually register an athlete?

Yes. In the **Roster Editor**, select the **Add Participant** icon to manually add a registration.

Can I limit the number of participants?

Yes. Set a **Maximum Roster Size** in your event settings or adjust it anytime from the Roster Editor.

Can I collect online payments?

Yes. pickAtime supports payment integrations including:

- MySchoolBucks
- PayPal
- Authorize.net
- First Data

Configure payment settings under:

Settings > Credit Card Setup

Can I create separate sign-ups for different teams or age groups?

Yes. You can create:

- Separate events
- Separate sessions
- Separate roster limits

for each program, age division, or team level.

Need More Help?

Additional setup resources are available in the User Manual under the Rostering section.

For support, contact:

support@pickatime.com