Roster Setup Guide

Admin UI Overview

Upon logging into your **pickAtime** account, you are directed to the **Administrative User Interface (Admin UI)**. By default, the system opens to the **Event Reporting** page.

The Header & Navigation Sidebar

- **User Profile:** In the top-left corner, click your name or the **arrow (<)** to edit your profile, change your password, or log out.
- **Sidebar Toggle:** Click the **"X"** in the green header bar to minimize the sidebar and expand your workspace.

Sidebar Navigation Menu

Continuing down the left-hand side, you will find the following management areas:

- **Reports:** View both **Event-Specific** and **Account-Specific** data.
  - If you manage multiple organizations, use the **Vendor** dropdown to switch accounts.
  - Use the **Event Reports** or **Account Reports** buttons to toggle between report categories.
- **Events Preview:** Create, view, and manage your specific events (e.g., "Fall Parent-Teacher Conferences").
- **Appointments List:** Access a master list of all bookings. This area is ideal for bulk-deleting appointments or sending manual, one-off emails.
- **Contacts:** Manage all users (Administrators and Parents).
  - View logs of booked/canceled appointments and email history for any participant.
  - Add new contacts, adjust administrator access levels, or reset user passwords.
- **Importer:** Upload data files (such as student or teacher rosters) into the system.
- **Global Setup:** Manage settings that apply to your entire account.
  - **Business:** Update your school’s name, address, and account-wide configurations.
  - **Contacts:** Create custom registration forms and prompts to collect specific information from parents when they first sign up.
- **Online Scheduler:** A direct link to the **Customer User Interface (CUI) -** this is exactly what your participants see when they book appointments.
- **Add New Account:** Open a window to create a separate business account under your vendor profile.
- **User Manual:** Opens the comprehensive online documentation in a new window.
- **Tour This Page:** Launches an interactive walkthrough with helpful tooltips to guide you through the current screen.

STEP ONE: Setup Event

When you first log in to your account from the pickAtime home page, you will be in the Admin tool and on the Event Reporting page.

1. Select the **Events/Preview** button on the AdminUI sidebar (left side).
2. Click on the green **Add** button.
3. Enter a name for your event, for example, "Summer Camp Registration", "Swimming Lessons".
4. Select the type of **ROSTER**
5. Select the Template event **Roster Event**, or use your template if you have previously used events with type Roster.
6. Select the appropriate **time zone** for your event location.
7. Optionally, you can add the **Date** and **Location** fields, which are labels used to help parents differentiate between multiple events on your landing page.
   - **The Date Field:** This is a text label, not a system-driven calendar. If your event spans several days, you can list them all here (e.g., "Oct 12-14") or leave the field blank.
   - **The Location Field:** Useful if you are managing events across multiple campuses or facilities.

For any event, you can also use the Event Details box on the screen to fill in any event-specific information that you may want to use in the display of your scheduler or in your emails for this event. Any text that you add in the Event Details box will be available as a macro field that you can use in your CUI Messages or in your Notification Setup. The macro for the Event Details is $(E_DESCRIPTION).

STEP TWO: Adjusting Event Settings

Once your event is added, the **Roster Editor** tab opens automatically. Here, you can set the **Max Roster Size** to determine the total number of participants allowed for your event. To further customize the experience, navigate to the **Settings** tab.

UI Setup

This section controls the functional behavior of your scheduler, including when it is active and what rules participants must follow.

Scheduler Availability

- **Open scheduler to customers on:** Enter the specific date and time you want the booking window to begin.
- **Close scheduler to customers on:** Enter the date and time the scheduler should automatically lock to participants.

Appointment Number Limits

- **Maximum Appointments per Event:** This setting allows you to cap the number of total appointments a single participant can book within this specific event.

Appointment Cancellations

- **Customer cannot cancel their appointment from:** Set the cutoff date after which participants are no longer permitted to cancel their own registrations.
- **Cancellation Message:** You can optionally activate and customize the message displayed to customers if they attempt to cancel after this deadline.

Scheduler Settings & Links

- **Event Scheduling Link:** This is the direct URL for your event. You can enter a **customized event name** (e.g., `/SummerCamp`) to create a shorter, branded URL.
  - *Important:* If you have other "Open" events on your account, participants can still toggle between them unless you use the **Category Option**.
- **Category Scheduling Link:** Use this link to display a scheduler that only includes events assigned to a specific category.

Miscellaneous & Advanced Settings

- **Student Dropdown Requirement:** Enable this to require parents to select a pre-imported student name when booking.
- **Multiple Appointment Booking:** Under **Advanced Settings**, check **Allow a customer to take multiple slots** if you want to permit a single participant to book more than one appointment at the same time.

Notification Setup

Use this tab to manage automated email communications. You can toggle settings for **Confirmation**, **Cancellation**, **Custom**, and **Reminder** emails.

Confirmation & Reminder Emails

- **Activation:** Check **Send Confirmation and Cancellation Emails** to automate these alerts.
- **Follow-up Settings:** Check **Send Follow-up Emails** and specify the date(s) you want participants to receive a reminder or follow-up notification.

Email Customization

- **Reply-To Email Address:** Enter your email here so that participant replies are sent to you directly. If left blank, replies are routed to a generic system response.
- **Subject Lines:** Customize the standard subject or the **Subject for combined email** (used when an appointment is canceled and immediately rescheduled).
- **Body & Header:** You can edit the text for the header, body, and footer. Additionally, you can select the option to **Replace the Email Body with the Printable Schedule of Appointments**.

CUI Messages

The **CUI Messages** tab allows you to customize the exact labels and text your participants see on the "Customer User Interface."

Modifying Display Text

- **Labels:** Select a label on the left (such as **Sign In page / Welcome message**) to edit the text that appears to the parent on the right.
- **HTML Content:** To edit or view the raw HTML for any message, click the **HTML icon (<>)** on the toolbar.

Branding & Logos

- **Account Logo:** To add your school logo to the scheduler, navigate to **Global Setup / Business**. Under **Account Level Settings / Account Logo**, use the **Upload** icon to add your image.

STEP THREE: Turn it on and try it out

Once your event is configured, use this step to finalize your timeline and perform a test run from the parents' perspective.

Activating the Online Scheduler

To make the scheduler live for your participants, you must define the active booking window.

- **Navigate:** From the **Events / Preview** page, select your event and click the **Go To Event** button.
- **Access Settings:** Select the **Settings** tab, then the **UI Setup** sub-tab.
- **Set the Window:** Modify the **Open scheduler to customers on** and **Close scheduler to customers on** dates.
  - *Note:* Any dates you want available for appointments or registration must fall within this specified start and end range.

Testing the Customer Experience

It is highly recommended to test the system to ensure the registration flow and messages appear exactly as intended. You can access the parent-facing site (CUI) in two ways:

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 URL

Navigate to the **Global Setup / Business** page to locate your **Account URL**.

- **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 checking the **Set custom URL** box and entering your preferred name (e.g., `pickatime.com/YourSchoolName`).

> If you set a custom URL, the **Account URL** will update to reflect your choice. Please allow approximately **5 minutes** for the new link to become active.