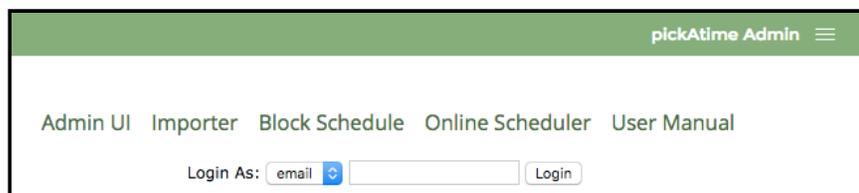


## Quick Start Guide to PTA (returning customers)

This Quick Start Guide is intended as a quick reference to setting up your *Fall 2017 PTA event*. This guide will not cover all the available options and settings for this product. Please refer to the [Online User Manual](#) for complete details.

Go to the **pickAtime homepage** ([www.pickatime.com](http://www.pickatime.com)) and log in with your username and password at the Client Login section in the upper right-hand corner. If you have forgotten your password you can select the 'Forgot Password' option and a new password will be emailed to you. Once you have logged in you will be on the Reports page and will see the following navigation line at the top of your screen.



Select the Admin UI link to bring up the Admin UI in a new page. Select the **Events** option on the dashboard. Then select your event from the list and click on the  button.

### STEP 1: Create Event

On the Account Management page of the new Admin UI, select the Event List tab in the upper left-hand corner. If you leave your old event in the listing, you will have the option to use your previous event as a template for your new event. This will then use the settings from the UI Setup, CUI Messages, and the E-Mail Templates pages (but not the teachers or slots) from your old event.

- Select the **Events** button on the pickAdminUI sidebar.
- Click on the  button to add a new event.
  - enter in a name for your event (e.g. Fall 2018 Parent Teacher Conferences)
  - set the Type to PTA
  - select the Template event of your previous event
  - set the Time Zone.
- Optionally fill in a date(s) label and location.

### Contact Information

The contact information from your previous parent-teacher conference is stored with pickAtime and is not removed when you delete an event. The contact information is the login information from your parents and teachers, as well as the student contact records. This means that your parents are able to

log in again using the email address and password they set up the first time they used pickAtime and do not need to re-register. Any children they had attached to their account will show up. If your parents have forgotten the password they used previously they can select the 'Forgot Password' button on the login page. Schools that have multiple conferences a year may find that this simplifies the process for parents. However, if your conferences are only one time a year, or if you think that it would be easier for parents to create a new account for each conference, you can delete the old contact information.

To remove all previous contact information:

- Select the **Global Setup / Contacts** page, select the [Show advanced options](#) at the top of the page.
- You will see a button labeled **Remove all customers**.
- Selecting this button will bring up a pull-down that will allow you to delete your contacts based on their access level.
- You will want to select the level **Resource Administrator**. This will remove all the stored login information for your teachers and parents.

Note, that selecting the level Vendor Access - Resource Administrator will not delete any full-powered Administrators.

## STEP 2: Import and View your Data

### Import your Data

- Create your 4 files in the same manner as you did previously. For reference on the format please see the [Data Format](#) section in the Online User Manual.
- Once you have created your four files, select the Importer button on the Report Selection page.
- Select data type of school, select your event name from the event pull-down, and then import your 4 data files.

If you have any errors on the data import, please refer to the Online User Manual, [Error Messages on Import](#), [How to Correct Bad Data](#), [Missing Data](#) pages.

### View your Data

- Go to the Event Management page, by clicking on the Manage Event icon to the left of your event from the Events List page.
- Select the **Class Editor** tab and view your list of teachers.
- Click on a teacher name to see the classes taught by each teacher.
- Click on a class name to see the list of students.

## STEP 3: Create Time Slots

- On the Event Management page of the Admin UI, select the **Appointments** tab.
- Select the correct date from the calendar on the left.
- Select a teacher from your list on the right.
- Then select the **Slots** drop-down and select **Create Slots**. This will bring up the **Create Slots** dialog box.
  - Press the Select All option to create slots on all your teachers, or select individual teachers
  - Enter in the start time for your conferences, the end time of conferences, and the duration of your conferences.
  - You can also optionally enter a travel break which would build in a break between each time slot.
  - When you are done, press the ok button.

## Block Out Slots

- To block out slots for a break, you can select the Delete Time Slots option and delete a range of slots.
- Alternatively, you can block out slots by selecting the Update Slots option.
  - Enter in your time range for your blocked slots
  - Select "make unavailable" from the Slot Type
  - Fill in a description in the white area (e.g. Lunch Break)

**IMPORTANT NOTE:** The Create Slots function will not "redo" existing slots. For example, if you create slots from 8 am to 12 pm, and then you realize you only needed slots from 9 am to 12 pm, you cannot simply "Create Slots" again with your new parameters. You will either need to delete the slots from 8 am to 9 am, or delete all slots and start again.

## STEP 4: Adjust Settings

- On the Event Management page of the new Admin UI, select the **Settings** tab and then the **UI Setup** tab.
- On the right-hand side under Scheduler Availability, adjust the Start day of appointment taking and End day of appointment taking.
  - Set these dates to the dates you would like the scheduler to open and close for your parents.
  - To be able to access the online scheduling while the site is closed to your parents check the box "allow Admins access at all times."

There are a number of additional settings on this page. For details on these settings please refer to the User Manual, [Appointment Settings](#) page or click on the ? button following each setting.

## STEP 5: Preview Scheduler

- On the **Global Setup/Business** page
- You can see a section labeled **Account URL**.
- This is the URL for your account.
  - You have the option to customize the URL, by checking the box "Set custom URL" and entering in your preferred text in the white box.
  - For example, if you entered in oneroomschoolhouse your URL would be <https://pickatime.com/oneroomschoolhouse>
  - A custom URL will become available in approximately 5-10 minutes after you create it.
  - This would then be the link you would provide to your parents or use on your school website.
- Click on your link or copy and paste the link to a new browser window.
- From here you can review the slots that you have created.
- You should test the site as if you were a parent, by attaching a student to your account, and booking and canceling an appointment.

## Frequently Asked Questions

Here are some of the more common FAQ's:

### **Q. When I go to the scheduling link I see a message that says "The online scheduler is closed."**

A. On the Settings > UI Setup page check the dates you have set for when the Scheduler will be open and closed. The closed date must be after the open date.

### **Q. I have multiple dates for my event**

A. On your event you can create multiple days of time slots. Simply use the calendar on the left-hand side and create slots on your first date. Then click on a new date on the calendar and repeat.

### **Q. How do I add a logo to my scheduler?**

A. To add a logo to the top of each page, go to the Settings > CUI Messages page and select Other and then Account logo\*. On the right-hand side click Insert/Insert Image button.

### **See Online Help Links for:**

[Link to Online User Manual](#)

[Link to FAQ](#)

[Template with Directions for Parents](#)  
[Parent FAQ](#)

[Template with Directions for Teachers](#)

**Need More Help? Email Us: [support@pickatime.com](mailto:support@pickatime.com)**

