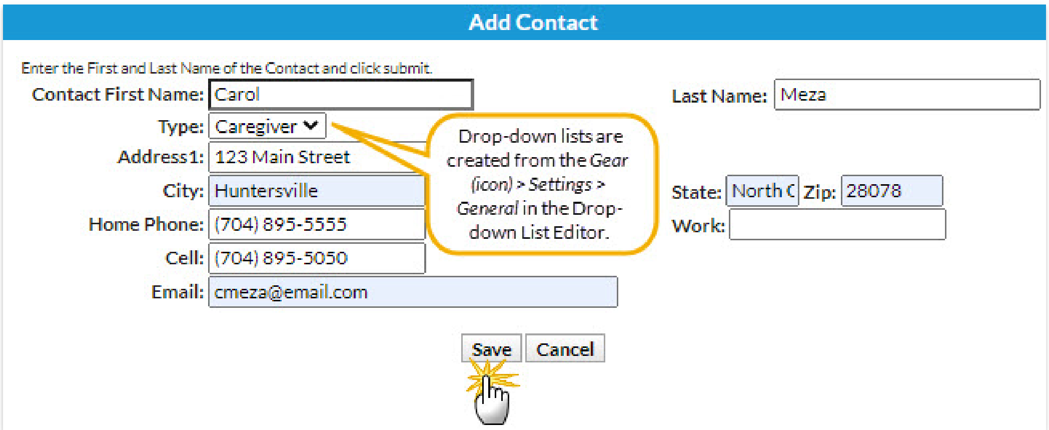
Contacts in the Family Record

Last Modified on 01/09/2023 3:52 pm EST

A Family can contain as many contacts as needed and is not limited to parents. Additional contact types can be added by going to the *Gear (icon) > Settings > General > Drop-down Lists (left menu) > Family > Contact Types.*

Add a Family Contact

1. Go to **Families** (menu) > **All Families** to locate the family or use the global *Find a family* search at the top of a page.
2. Click **Add Contact** (button) on the Family record.
3. Fill in the information in the pop-up window.
4. Click **Save.** A new contact page is created and opens.
    - Additional information that can be entered on a Contact's page includes employer details, driver's license #, birth month & day, social security #, address, and phone numbers, etc.
    - By default, the first contact added becomes the Billing Contact. The *Billing Contact* is used when sending statements. Change the *Billing Contact* by selecting **Billing Contact = Yes** or **Billing Contact = No** as applicable and **Save Changes**.



Add Contact

Enter the First and Last Name of the Contact and click submit.

Contact First Name: Carol

Last Name: Meza

Type: Caregiver

Address1: 123 Main Street

City: Huntersville

State: North C

Zip: 28078

Home Phone: (704) 895-5555

Work:

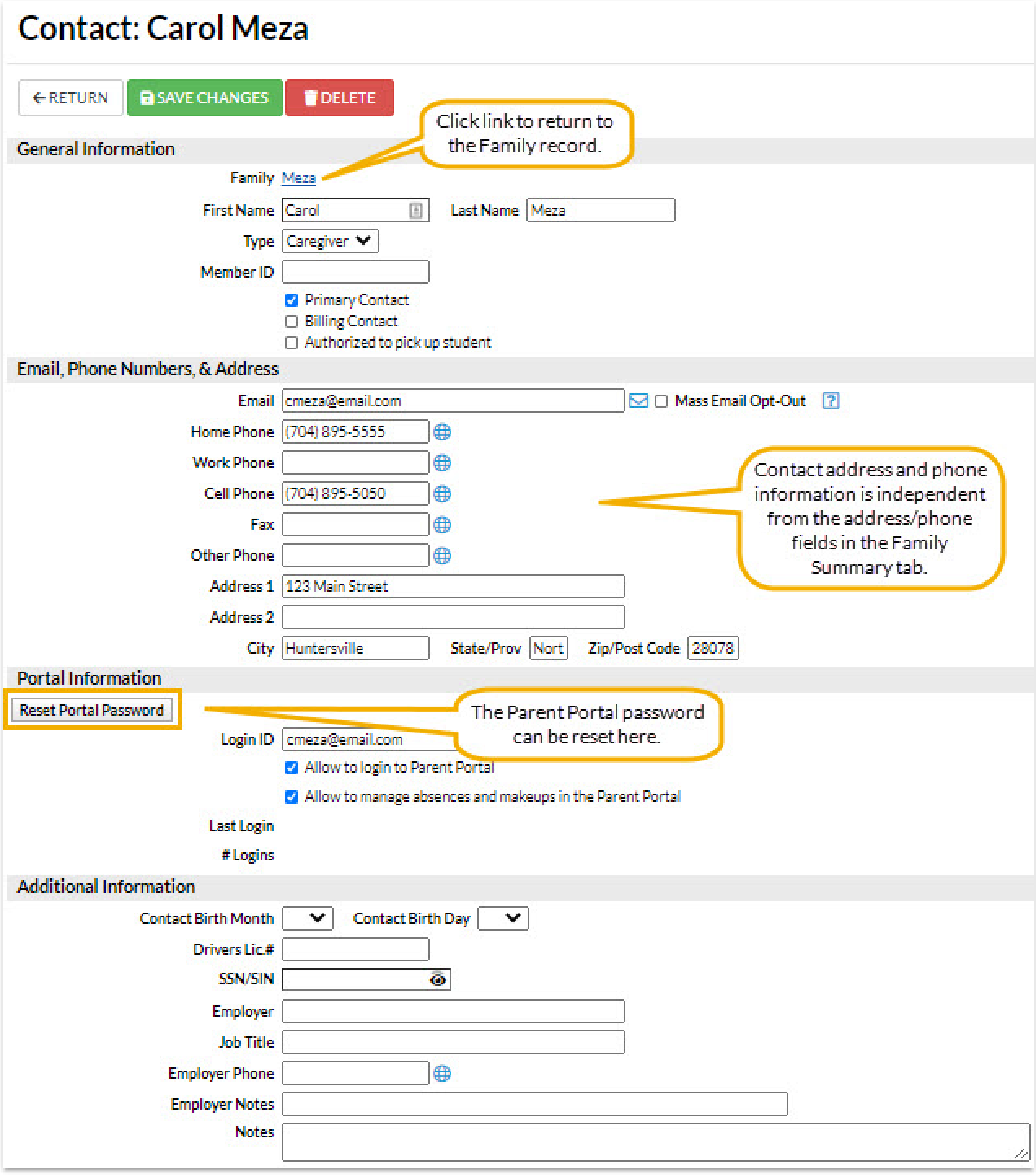
Cell: (704) 895-5050

Email: cmeza@email.com

Drop-down lists are created from the *Gear (icon) > Settings > General* in the Drop-down List Editor.

If a contact in the family record has more than one email address, add them into the Email field and separate the email addresses with a semicolon (;).

New Contact Page



Contact: Carol Meza

Click link to return to the Family record.

General Information

Family: Meza
First Name: Carol
Last Name: Meza
Type: Caregiver
Member ID:
☑ Primary Contact
☐ Billing Contact
☐ Authorized to pick up student

Email, Phone Numbers, & Address

Email: cmeza@email.com ☐ Mass Email Opt-Out
Home Phone: (704) 895-5555
Work Phone:
Cell Phone: (704) 895-5050
Fax:
Other Phone:
Address 1: 123 Main Street
Address 2:
City: Huntersville
State/Prov: Nort
Zip/Post Code: 28078

Contact address and phone information is independent from the address/phone fields in the Family Summary tab.

Portal Information

The Parent Portal password can be reset here.

Login ID: cmeza@email.com
☑ Allow to login to Parent Portal
☑ Allow to manage absences and makeups in the Parent Portal
Last Login
Logins

Additional Information

Contact Birth Month
Contact Birth Day
Drivers Lic#
SSN/SIN
Employer
Job Title
Employer Phone
Employer Notes
Notes

Changing a Family Address (on the Family Summary page) does NOT change a contact's address on the Contact's page. Changes to the contact's address must be done from the Contact page itself. Changing a Contact's Address does NOT change a family's address on the Family Summary tab. Changes to the family's address must be done on the Family's Summary tab.