

Contacts in the Family Record

Last Modified on 11/13/2024 12:44 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.
 - o 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.
 - o 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**.

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

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.
