

Contacts in the Family Record

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**.

Add Contact

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

Contact First Name: Last Name:

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

Address1:

City:

Home Phone:

Cell:

Email:

State: Zip:

Work:



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

← RETURN

SAVE CHANGES

DELETE

General Information

Family [Meza](#)

First Name Last Name

Type

Member ID

- Primary Contact
 Billing Contact
 Authorized to pick up student

Click link to return to the Family record.

Email, Phone Numbers, & Address

Email Mass Email Opt-Out [?](#)

Home Phone

Work Phone

Cell Phone

Fax

Other Phone

Address 1

Address 2

City State/Prov Zip/Post Code

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

Portal Information

[Reset Portal Password](#)

Login ID

- Allow to login to Parent Portal
 Allow to manage absences and makeups in the Parent Portal

Last Login

Logins

The Parent Portal password can be reset here.

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.