Contacts

On the **Contacts** tab, you can search for a contact, select the contact, and then view the information about that contact. Your contacts are your list of teachers, administrators, students, and parents. As soon as a parent logs into the online scheduler, their contact information will be stored in the contacts section.

- From the Admin UI, select the **Contacts** tab on the top line of the screen

> Note that student and parent names do not automatically display in the contacts section. You need to search by either first or last name to find your students and parents.

View the Info

After you search, you can select a contact, and the system will fill in the fields on the right with the contact's information. There are several small tabs on the right.

- The Search Control list will allow you to search by Last name, First name, Email address, and any other fields that you identify as an ID field in the Contacts Setup tab on the Global Setup page.
- You can select a contact record and then click on the Delete button to delete a contact, or click on the Reset PW button to reset the password for a contact.
- The Contact Info tab will display the contact's Email, First name, Last name, admin level, and customer access rights, as well as any fields you may have included from the Contacts Setup tab on the Global Setup page.
- The Teacher/Student/Parent IDs are translated from your school's BBID and must be included for Single Sign On access.
- The Appointments tab, not to be confused with the main Appointments tab on the top line, shows all the selected contact's appointments. For students, this will display the classes they are enrolled in.
- The Log tab shows what emails have been sent and when appointments were booked or canceled.
- The Vendor Access tab allows you to set up Resource Access and Event Access for your administrators.
- The Parents - Students map tab allows you to view, create, and change the set of students that each parent has. See [Parent - Student Relationships] for more details.

> **IMPORTANT NOTE:** If you are adding a new contact with an access level of either **Appointment Viewer, Appointment Maker, or Resource Administrator**, make sure you check the resource box in the **Resource Access** section.

> On the Vendor Access tab, the Master Access section with the 'allow access to all events and all resources' check box is available for **Appointment Viewer** and **Appointment Maker** access levels only. The **Resource Administrator** and **Event Administrator** access levels do not support the master access.

Once you have selected a contact, you will also have the option to reset the password for a contact. The Reset PW button will reset the password to the stored default password that is set on your account. To view or change this default password, see the Global Setup > Contacts Setup page.

Add a new Contact

To add a new contact, select the Add button. In the drop-down, you would have 4 options:

1. Teacher
2. Student
3. Parent
4. Other

Selecting one of these options will display an appropriate form; each form includes different contact fields, oriented to the contact you are going to add. On the form, you will need to fill in the fields where you see the text <not entered>.

> The form will not allow you to create a new contact record with the email address that already exists on the vendor account.

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