

Manage Contacts

The **Contacts** tab serves as a central directory for everyone who interacts with your account. A participant's information is automatically saved here as soon as they log into the online scheduler for the first time.

Searching for Contacts

By default, participant names do not automatically populate in a list. To find a specific person:

- Navigate to the **Contacts** tab in the top navigation bar.
- Use the **Search Control** list to search by **Last Name**, **First Name**, or **Email Address**.
- *Note:* You can also search by any custom ID fields you have configured on the **Global Setup / Contacts** page.

Adding and Removing Contacts

- **To Add:** Click the green **Add** button and fill in the required fields.
 - *Important:* If you receive an error regarding a duplicate email address, the system will flag the record in **red**. You should delete the duplicate record to avoid system errors.
 - **To Delete:** Select the contact from the list and click the **Delete** button.
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Contact Details and Tools

Once a contact is selected, their information will appear in the panel on the right. You can navigate through several specialized tabs to manage their profile:

Contact Info

Displays the user's primary details, including Email, First/Last Name, Admin Level, and Customer Access Rights. Any custom data fields collected during registration will also appear here.

Appointments

This tab (internal to the contact record) displays a complete list of all appointments associated with this specific person.

Log

A historical record for the contact, showing:

- Timestamps for when appointments were booked or canceled.

- A record of all automated and manual emails sent to them.

Vendor Access

Used specifically for staff, this tab allows you to define which events or resources an administrator has permission to manage.

Password Management

If a participant or administrator forgets their password, you can reset it manually from their contact record.

- **Resetting:** Click the **Reset PW** button.
 - **Result:** This reverts their password to the account's **Default Password**.
 - **Configuration:** To view or change what the default password is, navigate to the **Global Setup / Contacts** page.
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