Parents

- A parent has forgotten the password
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- How can I see the appointments my parents have made?
- Is there a way to see when a conference was scheduled by a parent? Not the time of the conference,but the time/date it was actually scheduled.
- How can I login as parent? How can I impersonate parent?
- I have a parent who claims that they booked an appointment, but when they log in they can't see any appointments

A parent has forgotten the password

To reset a parent's password, follow these steps:

1. In the Admin UI tool, go to the **Contacts** tab.
2. Search for the parent by name or email.
3. Select the contact record to open it.
4. Click the **Reset PW** button under the Search Console.

A parent has logged in via mobile phone. How to locate a list of booked appointments and manage them?

To locate and manage appointments on a mobile device, a parent should follow these steps:

1. Tap the **three-bar menu icon** (hamburger menu) at the top of the page.
2. Under the Main Navigation section, select **My Appointments**.
3. Next to each scheduled appointment, tap the **three-bar menu icon**.
4. A list of up to 4 options will appear, allowing the parent to:
    - **Cancel** the appointment.
    - **Change Time** to a different time.
    - **Edit** any specific form information provided during booking.
    - Check the **Details**.

This allows parents to handle their entire schedule directly from their phone without needing to access a desktop computer.

How can I see the appointments my parents have made?

To view a specific parent's schedule and manage their bookings, follow these steps:

1. Navigate to the **Contacts** tab.
2. Search for the parent by name or email address.
3. Click on the parent's record to select it.
4. Select the **Appointments** tab within that contact's profile.

From this view, you can see a full list of their scheduled times. You also have the option to click **Print** to generate a hard copy or **Email** to send a fresh copy of the schedule directly to the parent.

Alternative: Viewing All Appointments at Once

If you want to see everyone's appointments for the entire event rather than looking up a single parent:

- Go to the **Appointments** tab in the main sidebar.
- Select **Appointments List** from the top sub-menu.
- This provides a master list of every booking, which you can filter by teacher, date, or student name.

Reports

For a professional, downloadable version of all appointments, go to the **Reports / Event Reports** section and run the **Parents' Schedule** report. These are perfect for exporting to Excel if you need to share the data with your staff.

Is there a way to see when a conference was scheduled by a parent? Not the time of the conference,but the time/date it was actually scheduled.

Yes, you can track exactly when an appointment was created (the "transaction time") using either a broad report or by looking at an individual contact.

Option 1: Using Reports (For Multiple Appointments)

If you need to see the booking times for your entire event in one list:

1. Go to the **Reports** page.
2. Select your desired report (e.g., **Teachers' Schedule**).
3. Click the **Additional report fields** link (usually located near the top or bottom of the report settings).
4. Select **Appointment fields** from the list.
5. Check the box for **Created Date** and click Ok.
6. You will now see a column showing the exact date and time the parent performed the booking action.

Option 2: Using the Contact Log (For Individual Parents)

If you only need to check this for a specific person:

1. Go to the **Contacts** page in the Admin UI.
2. Search for the parent by name and click on their record.
3. Click the small **Log** tab at the top of their profile.
4. Look at the **Record Added on** column - it will display the specific timestamp for each action.

How can I login as parent? How can I impersonate parent?

Logging in as a parent allows you to manage their schedule or view the site exactly as they see it. You can do this directly from your admin dashboard without needing their password.

Steps to Login As a Parent

1. **Locate the Parent:**
   - In the **Admin UI** tool, go to the **Contacts** page in the sidebar.
   - Use the search boxes to find the parent by name or email.
2. **Access the Profile:**
   - Select the parent’s record in the search results.
   - On the right section (the **Contact Info** tab), you will see the parent's email address and other contact details.
   - Select the **Login As** button under the search console.

If the Parent is Not in Your System

If you cannot find the parent, you can create a record for them on the fly:

- On the Contacts page, click **Add > Parent...**
- Enter the parent's email and other details.
- You can then proceed to book appointments on their behalf immediately.

What Happens When You are Logged In?

Once you are logged in as the parent, you will see the scheduling interface exactly as they do. You can:

- **Make, Change, or Cancel** appointments.
- **Update Account Info:** Modify their phone number or other registration details.

> **Emails:** The parent will still receive automatic confirmation / reminder emails for any actions you take while logged in as them.

> When you are finished, be sure to click **Logout** or close the parent view tab to return to your administrative dashboard. If you simply close the window, you may still be "impersonating" that parent the next time you open the scheduling page.

I have a parent who claims that they booked an appointment, but when they log in they can't see any appointments

It is common for this issue to be caused by a parent having multiple accounts (using different email addresses) or accidentally canceling their own slots.

Here is how to investigate and solve this:

1. Check for Multiple Accounts

The most likely scenario is that the parent booked using one email address but is currently logged in with another.

- Go to the **Contacts** tab in the Admin UI.
- Instead of searching by email, **search by the parent's last name.**
- Look for duplicate names. If you see two records with different emails (e.g., a work email and a personal email), check the **Appointments** tab for both.
- If you find the appointments under the "other" email, you can either tell the parent which email to use or merge the records.

2. Review the Activity Log

If you only find one account and it has no appointments, the **Log** will tell you exactly what happened.

- Click on the parent's record in the **Contacts** tab.
- Click the small **Log** tab at the top.
- **Look for these entries:**
    - **Appointment Created:** This proves they did book it at some point.
    - **Appointment Canceled:** This shows the parent (or an admin) cancelled the booking.

Pro-Tip: If the parent insists they have a confirmation email but you can't find them in the Contacts list, ask them to forward that email to you. The email will contain the exact **Email Address** and appointment details needed to track down the record in your system.