

Contacts

The **Contacts** tab is where your full list of teachers, administrators, and parents is stored. Parent contact records are created automatically the first time they log into the online scheduler.

To get started: From the Admin UI, select **Contacts** on the left-hand side dashboard.

Viewing Contact Info

Search for and select a contact to populate their details on the right-hand side. Several tabs are available:

Tab	What it shows
Contact Info	Email, first/last name, admin level, customer access rights, and any custom fields configured under Global Setup / Contacts
Appointments <i>(small tab, distinct from the main Appointments tab)</i>	All appointments for this contact. For students, this shows enrolled classes.
Log	Email history and a log of when appointments were booked or canceled
Vendor Access	Resource Access and Event Access settings for administrators

Search options: The Search Control list allows you to search by **Last Name, First Name, Email**, or any custom ID fields configured under **Contacts**.

Other actions available from a selected contact:

- **Delete** — removes the contact
 - **Reset PW** — resets the contact's password to your account's default password (configurable under **Global Setup / Contacts**)
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Setting Up Vendor Access

“ **Important:** When adding a new contact with **Appointment Viewer**, **Appointment Maker**, or **Resource Administrator** access, be sure to check the appropriate box under **Vendor Access / Resource Access** — otherwise

they won't have access to any resources.

Master Access: The "**Allow access to all events and all resources**" option under **Master Access** is only available for **Appointment Viewer** and **Appointment Maker** levels. It is **not** available for **Resource Administrator** or **Event Administrator** levels, which require resources/events to be granted individually.

Adding a New Contact

1. Click **Add**.
2. Select a contact type from the drop-down:
 - **Admin**
 - **Teacher**
 - **Parent**
 - **Other**
3. Fill in the fields marked on the form — fields vary depending on the contact type selected.

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

Revision #10

Created 2026-04-08 12:56:48 UTC by Yura Nechyporenko

Updated 2026-06-21 04:26:18 UTC by Anne Taves