

How do I add a new contact to a family?

1. You can add a new contact to an account once the account has been created. Entering of the new contact details is performed from the **Family Information** screen which is available from the **Home** page and the **Site Map**. Once you are in the **Family Information** screen, go to the family that you wish to add the contact to and **Enter Edit Mode**.

The screenshot shows the 'Family Information' interface. The '1. Contact Information' section is active, and the 'Add Contact' button is highlighted with a red box. The form contains the following fields:

- Title: Mr
- Home Address: 43 Station Street
- Suburb / PCode: Mombrose 4413
- Company Pays Account? Clear Address
- Relationship: Father
- Occupation:
- Status: Primary Carer
- Work Company:
- Work Address:
- Suburb / PCode:
- Family CRN: 1110062030
- Phone (H): 5533774 Phone (W):
- Account: Williamson, Peter
- Mobile: Email:
- Family ID: AAA62030
- Pays Accounts? May Collect Child: Yes

Other sections visible include '7. Financial Details' with a table of transactions, '2. Child Details' for Belinda Williamson, '6. Child Bookings' with a weekly grid, '3. Medical Details', '4. CCB Statements', and '5. Child Daily Fees'.

2. The first contact name to appear in panel 1 of the **Family Screen** will always be the *Primary Carer*. To begin the process of adding a new contact, click on the **Add Contact** button.

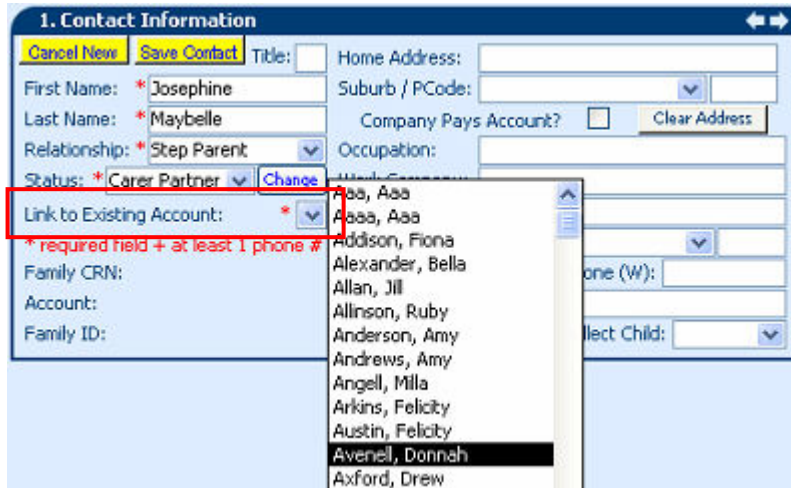
This is a close-up of the '1. Contact Information' form. The 'Add Contact' button is highlighted. The form includes the following fields and options:

- Buttons: Cancel New, Save Contact
- Title:
- Home Address:
- Suburb / PCode:
- Company Pays Account? Clear Address
- Relationship:
- Occupation:
- Status:
- Work Company:
- Work Address:
- Suburb / PCode:
- Family CRN:
- Phone (H): Phone (W):
- Account:
- Mobile: Email:
- Family ID:
- Pays Accounts? May Collect Child:

A red asterisk indicates required fields. A note at the bottom states: '* required field + at least 1 phone #'.

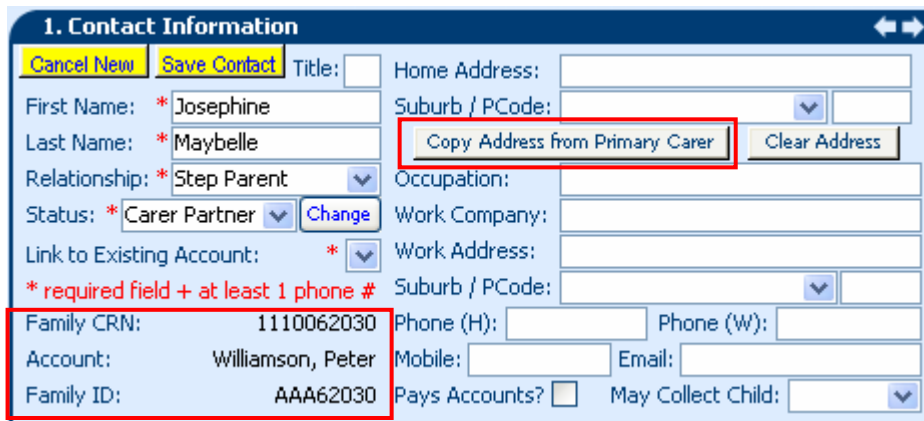
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3. Type in the new contact's details, most importantly the *First Name*, *Last Name*, *Relationship* and *Status* of the contact. Then use the dropdown selector to the right of **Link to Existing Account** to select the account that the contact is to be added to. E.g. Williamson, Peter



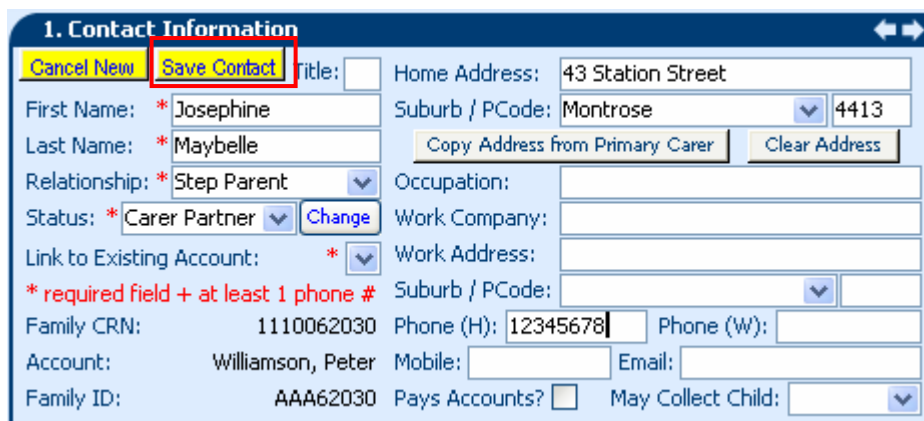
The screenshot shows the '1. Contact Information' form. The 'Link to Existing Account' dropdown menu is open, displaying a list of names including 'Aaaa, Aaa', 'Addison, Fiona', 'Alexander, Bella', 'Allan, Jill', 'Allinson, Ruby', 'Anderson, Amy', 'Andrews, Amy', 'Angell, Milla', 'Arkins, Felicity', 'Austin, Felicity', 'Avenell, Donnah', and 'Axford, Drew'. The 'Save Contact' button is highlighted in yellow.

4. Once the link to an account has been created there will be a button available enabling you to **Copy Address from Primary Carer** of the account, who's name is displayed in the bottom left-hand side of the panel.



The screenshot shows the '1. Contact Information' form with the 'Copy Address from Primary Carer' button highlighted in red. The 'Link to Existing Account' dropdown is set to 'Williamson, Peter'. The 'Family CRN' is 1110062030 and the 'Family ID' is AAA62030.

5. Enter at least one phone number for the contact and any other relevant information you want to enter, and then click on the **Save Contact** button.



The screenshot shows the '1. Contact Information' form with the 'Save Contact' button highlighted in red. The 'Home Address' is '43 Station Street', the 'Suburb / PCode' is 'Montrose 4413', and the 'Phone (H)' is '12345678'.

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6. The contact has now been added to the account and is displaying in the bottom left-hand corner of the family screen.

The screenshot shows the 'Family Information' software interface. The 'Contacts' section in the bottom left is highlighted with a red box. It lists the following contacts:

Name	Relationship
Josephine Maybelle	Step Parent
Peter Williamson	Father

The main form displays details for the contact 'Josephine Maybelle', including her first and last name, address (43 Station Street, Montrose, 4413), and relationship (Step Parent). The 'Child Details' section shows information for 'Belinda Williamson', including her date of birth (1 Apr 2004), sex (Male), and start of school (16 Jan 2007). The 'Financial Details' section shows a balance of \$3160.00 and a receipt of \$76.00. The 'Child Bookings' section shows a table of bookings for the child, with columns for Week, Day, and Status.

7. Exit Edit Mode when you have finished editing the family/account information.