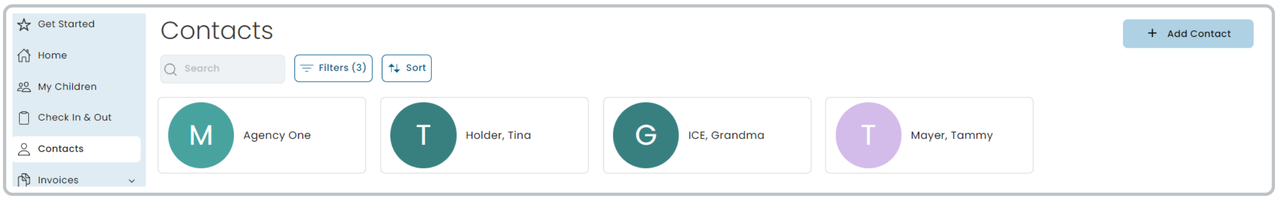
Manage Contacts

Last Modified on 03/06/2024 5:43 pm CST

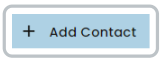
To view a list of all your contacts, click **Contacts** from the menu on the left. From here, you can use the filter and search options to find and organize contacts easily. Filter options include searching **Guardians** vs **Agencies**, payment permissions, and I**nactive** vs **Active**.



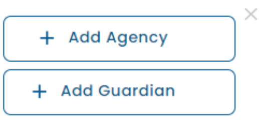
1. **Search:** Start entering in the Participants name to automatically filter the list by what you enter.
2. **Contact Filter Options**
    - **Filter by Contact type**
    - **Filter Contact by status**
        - Active: Participants who are still in your care and a part of your program. Participants must be active to be added to an Invoice.
        - Inactive: Participants who are no longer in your care.
        - Both.
3. **Sort by**
    - Alphabetical by Last Name, First Name.
    - Alphabetical by First Name, Last Name.

Add Contacts

You can add a **Contact** two different ways in Parachute. The first way is to add a **Contact** directly from the associated Child Profile. You can also add **Contacts** directly into the contact page.

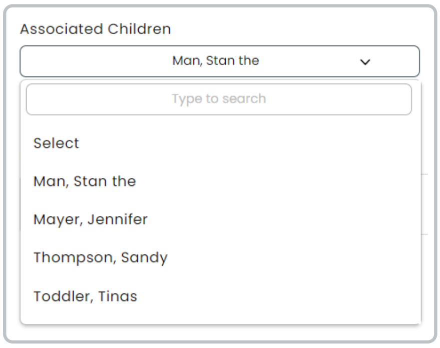
1. From the menu to the left, click **Contacts.**
2. Your **Contacts** page opens. Click 

in the top right corner of the screen.
3. Select if you are adding a **Guardian** or an **Agency.**



    - **Guardian:** This is meant to indicate the payer has a personal relationship with the child. This payer type can still be used even if the Payer is not a legal guardian of the child.
    - **Agency:** This payer type can be used for onboarding 3rd party billers or agencies that provide funding for a child's care.
4. Enter the required **Contact** fields such as Name, Email/Phone.

5. Select the child this Guardian/Agency is affiliated with in the **Associated Child** drop down.



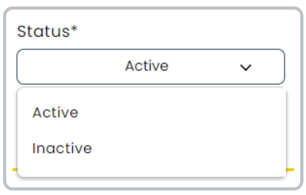
6. If the Guardian/Agency is associated with multiple children, click + Add Associated Children and add all children associated with this contact.
7. Click one of the **Save** options**.**
    - **Save & Add Next Contact**: Use this to add multiple contacts quickly by saving and opening a new blank screen to complete for a new contact.
    - **Save:** This saves the contact and takes you directly to the contact profile that was just created.

Add Contact Photo to Profile

1. From the **Contacts** screen, click on the name of the contact you are adding a photo for.
2. Click Edit in the top right corner.
3. Click the icon next to the contact name to add a photo.
4. Select the photo to add from your files/gallery on your device and click **Open.**
5. The photo loads into the contact profile.
6. Click **Save.**
7. To delete the photo, click **Delete** under the image and it will be removed and set back to the default.

Update Contact Status

1. From the **Contacts** screen, click on the name of the contact you are updating status for.
2. Click the Edit button in the top right corner.
3. The **Status** option appears underneath the contact name.
4. Here, you have the option to set the status to **Active** or **Inactive.**



5. Click **Save.**

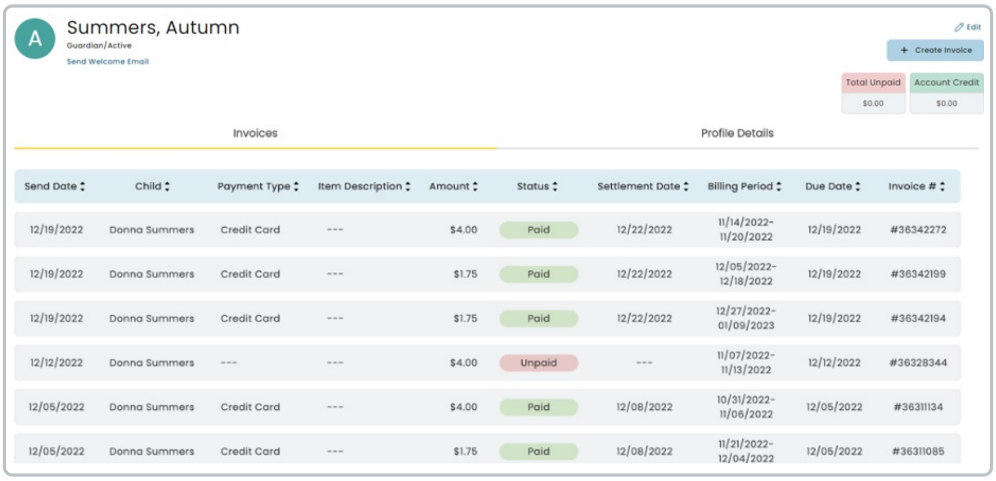
View and Edit Contact Profiles

1. From the **Contacts** screen, click on the name of the contact you are needing to view/edit.
2. Click the Edit button in the top right corner.
3. Edit any information that needs to be updated under the **Invoices** or **Profile Details** sections.
4. Click **Save** in the top right corner.

Invoices

The **Invoices** tab in a contact profile gives a view of all invoices associated with the contact, allows invoices to be printed, resent or created, as well as showing important balances. See a list of all action items available on this screen below.

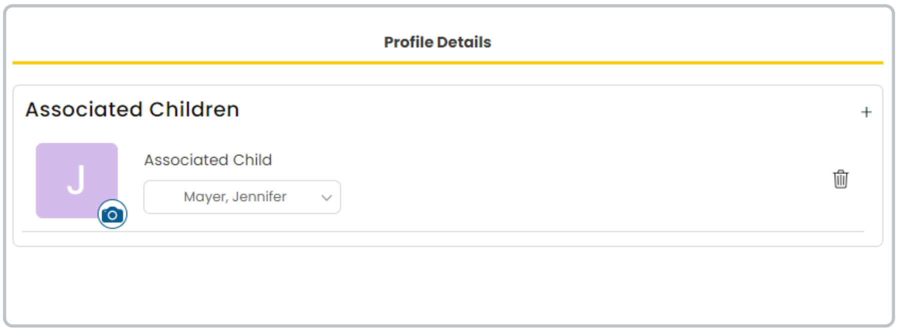
- **Total Unpaid:** This is the total balance of Invoices for this Contact that have not yet been paid.
- **Account Credit:** This is the total balance of Account Credit that has been granted for this Contact, but not yet used.
- **Invoices Table:** This is a history of all invoices for this Contact.
- **Create Invoice:** This allows you to create a new Invoice directly from the Contact profile.
- **Send Welcome Email**: Allows you to quickly send or resend the **Welcome Email** inviting them to setup their Parent Portal.



Profile Details (Guardian)

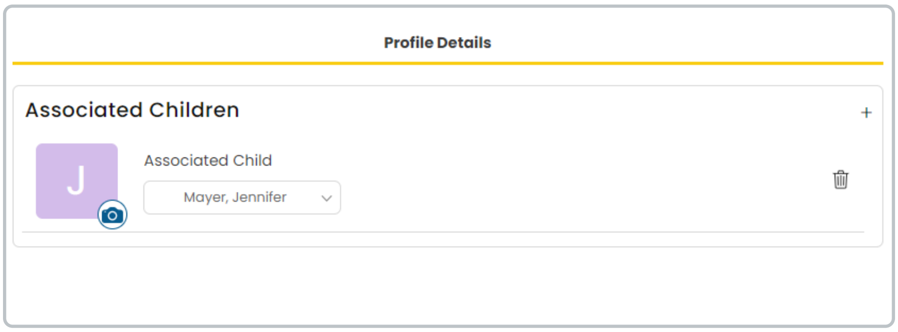
- **Personal**
  - **Emergency Contact:** Is this contact listed as an emergency contact for the associated children?
  - **Permission to Pay**: Required to be marked "Yes" in order to generate an invoice for this Contact.
  - **Permission to Initiate Payments:** Allows Payer to spend payments that are not associated to an

Invoice.
  - **Phone Number OR Email** address is required.
  - **Address**
  - **Primary Language**
  - **Additional Language**
  - **Authorized to Pick Up Child**
  - **Enrolled in Autopay:** This is updated by the Payer depending on their settings.
  - **Notes:** Internal notes related to the Payer.
- **Associated Children:**
  - Click the "**+**" to add additional children this contact is associated with.
    - If you associate a Contact with a Child in the Child's Profile you will see the associate reflected here as well.
  - Click the next to the child to remove them from the contacts associated children list.
  - Click the to add a picture of the child.



Profile Details (Agency)

- **Personal**
  - **Permission to Pay**: Required to be marked "Yes" in order to generate an invoice for this Contact.
  - **Permission to Initiate Payments:** Allows Contact to spend payments that are not associated to an Invoice.
  - **Primary Contact**: Enter first and last name of the Agency's primary contact.
  - **Phone Number OR Email** address is required.
  - **Address**
  - **Enrolled in Autopay:** This is updated by the Payer depending on their settings.
  - **Notes:** Internal notes related to the Payer.
- **Associated Children:**
  - Click the "**+**" to add additional children this agency is associated with.
  - Click the next to the child to remove them from the agency associated children list.
  - Click the to add a picture of the child.


Profile Details
Associated Children
J
Associated Child
Mayer, Jennifer