

Family- How to add a contact as a payer

Last Modified on 12/07/2020 7:12 am EST

Navigate to the family record screen, select the more menu from the child tab. Then select the contacts option.

Baggins Family
Family ID 323500
Internal Note:

2 Student(s)
Regular Statement Type
445.00 Balance Outstanding
Add/View Journal Notes

Summary Family Children Parents Third Party Volunteers Communication Auto-Pay Vacation Financials Receipts Merge

Frodo Baggins Age 6
Bilbo Baggins Age 4
Add Sibling

Admission/Personal Doctor/Health Program/Room Assignment Calendar View More

Personal Information Admissions

Last Name * Baggins
First Name * Bilbo

Status Active
Enrollment Date 10/01/2018

Additional Information
Health
Incidents
Contacts
Sponsors
Information Record - PDF

To add a new contact click the add new contact link-

Contacts Add New Contact

Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed
test	test	Release	1231231231			test@cirrusgroup.c	Y	05/10/2018

Then scroll to the empty contact information fields. Be sure to select Yes from the payer? drop down menu. Complete the record- including email address then press save.

Contact Information

Contact Type: Emergency Release

First Name: New Contact
Last Name: Test

Relationship: Step Parent
Active?: Yes
Can be released?

Release Limitations/Notes

Payer Information

Payer?: Yes
Payer User ID

To edit an existing contact click the edit icon-

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Contacts Add New Contact									
Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed	
test	test	Release	1231231231				N	04/12/2018	

Under payer information, select Yes- then press save.

Payer Information

Payer? Payer User ID

Disable Pin

Personal Information

After pressing save, the user ID and password will automatically be set. Provide this to the contact or the parent to allow the new paying contact to login.

Contact Information

Contact Type: Release

First Name: test Last Name: test

Relationship: Step Parent Active? Yes Can be released?

Release Limitations/Notes: Volunteer Status: [Register](#)

Payer Information

Payer? Yes Payer User ID: **ttest323500**

Password: Confirm Password:

[Update](#)

Password requirements:

- Password must be at least 8 characters
- Password must contain at least one number
- Password must contain at least one special character !@#\$\$%^&*~--

By default the payer will be added to the system with the Family Portal Contacts (Not Allowed) role

on the setup > admins, actions > setup roles area.
