




Work with Family Accounts - Contacts

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The Contacts section in a Family Account shows profile cards for each contact. Use the Contacts section to:

-  See a caregiver's relationship to a child.
-  View contact information such as phone number, email, and address.
-  Send emails to the contact.

Access the **Family Account** from **Family Account** (left menu) > **Profiles** card > **View # Active Family Accounts**, or use the *Search* box at the top of any page in the system. The contacts in the family are listed at the bottom of the page.




Use the **Actions** menu  on the top right of the Family Account page to see more options for working with a family.

Expand/Collapse All

Contacts Section

When a Family Account is clicked, children and contacts on that account appear. Do the following in the Contacts section:

- Expand or collapse the Contacts section using the right arrow.
- Use the **Options** icon  on a contact's profile card to open the *Contact Details* tab or *Delete* the profile.
- Click a contact's email address to send a new email.


The screenshot shows the Traska Family Account interface. At the top, there's a header with the account name 'Traska' and a navigation menu with tabs: DETAILS, BILLING, TRANSACTIONS, INVOICES, AUDIT LOG, and NOTES. Below the header, there's a section for 'ACTIVE' members with profile icons. The main content area is divided into 'Children (3)' and 'Contacts (3)'. The 'Contacts (3)' section displays three contact cards: Marie Traska, Pete Traska, and Fran Wellman. Each card shows the contact's name, a 'PAVER' status, a list of children, phone numbers, email addresses, and home addresses. A callout box points to the 'Expand or collapse section.' button, and another callout points to the 'Click to send a new email.' button.



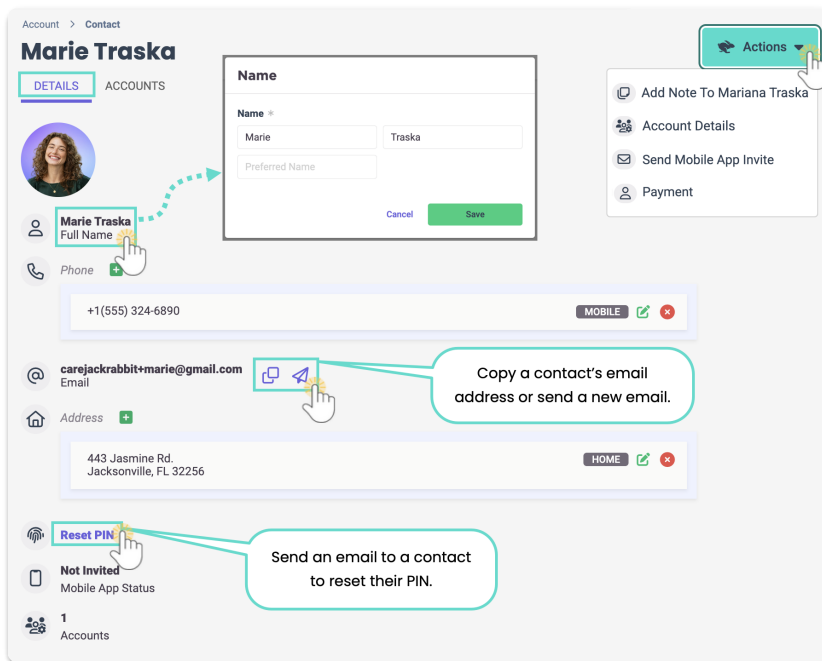
When clicking the email address, Jackrabbit will launch a new email with the recipient's information pre-filled using your local computer's email application. If no email applications are installed, clicking the link might activate an email client *Setup Wizard*.

Details Tab

The contact's information is displayed on their Details tab. Do the following from the Details tab:

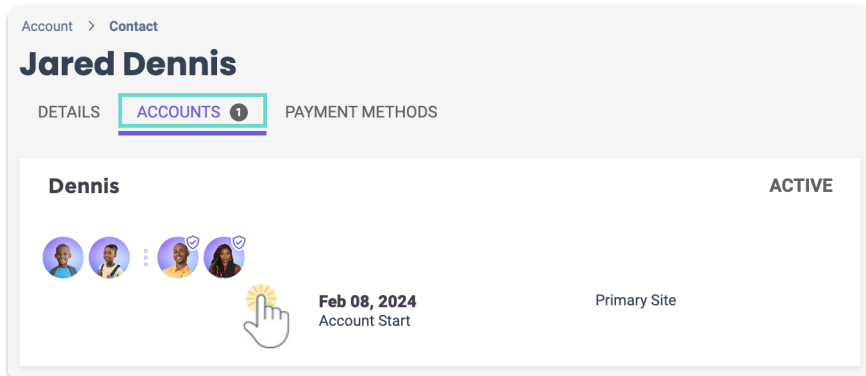
- Use the **Actions** menu  to add a Note, view Account Details, Send Mobile App Invite, and record a Payment.
- Click the Photo, Name, Phone, Email, or Address sections to make updates.
- Click **Reset PIN** to email the contact to reset their PIN.
- Copy an email address or send a new email to a contact using the email program installed on your computer locally.

Note: Clicking the link may trigger an email client *Setup Wizard*.



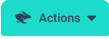

Accounts Tab

The Accounts tab gives information about all accounts the contact is associated with. Click an account card to view the Family Account.



Payment Methods Tab

The Payment Methods tab is only accessible if your organization is signed up to process ePayments with [Jackrabbit Pay](#). A contact must then [Add a Payment Method in the CircleTime Mobile App](#) Do the following from the Payment Methods tab:

- Use the **Actions** menu  to add a Note to the contact, view Account Details, or [Record a Payment](#).
- Use the **Options** icon  on a contact's profile card to *View Terms and Conditions* of a Payer's mobile payment or *Delete* the mobile payment method on file.
- Click **Send Payment Method Invite** to email the contact an invitation to log in to CircleTime and add a payment method. Contacts can do this without an invitation, but this step may serve as a reminder to those without a payment method already on file.

Account > Contact

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DETAILS ACCOUNTS **PAYMENT METHODS**

BANK ACCOUNTS

You don't have any bank accounts saved.

CREDIT/DEBIT CARDS

Discover ...6611 **Primary**

- View Terms and Conditions
- Delete

Name on Card
Vivian Pham

Expiration Date
03/2030

Zipcode
32256

Updated by
vivian@email.com on 02/12/2025

Send Payment Method Invite

Actions

- Add Note To Vivian Pham
- Account Details
- Payment



To add a new Contact profile to a Family Account, use the **Actions** menu  on the Family Account page.