

The Family Record

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The **Family** record provides a centralized area to keep all information related to a specific family. It's like a file cabinet; it stores and organizes important information.

You can access a Family record from the following locations in Jackrabbit:

- *Families (menu)* > *All Families* and click on a family name to open the record.
- *Families (menu)* > *All Families* > row menu > *View/Edit* to open the record.
- Use the global search at the top of each page to find a family.

Refer to [Work with All Families - View, Search, and Take Action](#) for more information on the *All Families* grid.

In the Family record, the information is grouped and organized on different **tabs**. **Buttons** allow you to perform an action for the family, for example, post a fee, and many links are provided throughout the record for convenient access to additional relevant information. Other links can be used to do things like enrolling a student.

The *Current Balance* displayed here is pulled from the *Transactions* tab. A **black** balance means a zero balance, a **red** balance indicates an amount is owed to you, and a **green** balance indicates a credit. This color code feature is applied on the *Transactions* tab as well.

**Expand/Collapse
All**

Family Tab Descriptions

Tab	Description
Summary	The <i>Summary</i> tab offers a summary of details for the primary contact and displays key information about the students in the family. The main address is stored on this tab, the registration date is displayed, and if the family is a Problem Account , it is designated here.

Tab	Description
Contacts	Information about the contacts in the Family record, including emergency contact details, is summarized in a grid on the <i>Contacts</i> tab. Use the View link for additional information about a specific contact or control their Parent Portal access.
Classes	The <i>Classes</i> tab provides details for the current and future enrollments for all students within the family. The ten most recent past enrollments are displayed, as well as a listing of any waitlists the students are on. See the <i>Student</i> record or use the Enrollment Detail Report for details on older past enrollments.
Events	The <i>Events</i> tab stores all current and past event enrollment details for the family. The student's name is shown when enrollment into the event was by the student (versus by family).
Transactions	The <i>Transactions</i> tab displays the 20 most recent transactions for a family (fees, payments, and credits). Click the View Transaction History button for the family's entire transaction record. View Unapplied Credits & Unpaid Fees displays a listing of these types of transactions, which can be helpful when correcting linking errors.
Billing Info	The <i>Billing Info</i> tab contains all of the billing details set for a family, such as credit card/bank account information, Family Fixed Fees , and details about any discounts to be applied to tuition fees.
Misc	<p>Additional important family information is stored on the <i>Misc</i> tab, including Family User-defined Fields, Emergency Contact Form, and family-specific Parent Portal Login Message.</p> <p>See details of registrations done through the Parent Portal, Online Registration, and Quick Registration (<i>View Registrations</i> button) and review a history of emails sent to the family (<i>View Sent Emails</i> button).</p> <p>In addition, some businesses find it helpful to mark families as <i>Prospects</i> for tracking purposes.</p>

Tab	Description
Notes	Add, edit, or delete notes for a family here. Search notes, filter the notes by tags, and sort the notes by the date created or by the date modified. Learn more about Notes in Jackrabbit.
Resources	Upload files and add hyperlinks (URLs) to the family's record. Store up to 15MB of data. Learn more about Resources in Jackrabbit
Policies	<p>Policies associated with the classes the family is enrolled in are shown in this tab.</p> <p>The family's classes and their related Policy Groups are listed, along with an indicator of the policies that have been agreed to or may need agreement from the family. Learn more about Legal Policies & Policy Groups.</p>

Family Button Descriptions

Button	Description
Make Sale/Post Fees	Use the <i>Make Sale/Post Fees</i> button to post fees or make a store sale to a family. Once a fee or sale has been posted, it is visible under the family's <i>Transactions</i> tab. Learn more about posting fees.
Payment/Credit	Use the <i>Payment/Credit</i> button to enter a payment the family made or post a credit to a family. Learn more about entering payments and posting a credit .
Refund	View the last 20 payments a family has made and choose a payment to refund. Learn more about refunds.
Statement	Print or email a statement for an individual family. Learn more about statements.
Add Student	Add students to the Family record.
Add Contact	Add contacts to the Family record.

Button	Description
Archive Family	Archive a family to your Lead File. Learn more about the Lead File.
Family Name	Use this button to change the last name on the Family record and select if it should apply to students, contacts, or both.
Email	Generate an email to the family and select which family members should receive it. Learn more about emailing in Jackrabbit. You can also send a text message or push notification (when enabled) from the Email/Text Families page by changing the <i>Type</i> in the Message section.
Email Schedules	Email the current class schedules for all active students in the family. Learn more about emailing student schedules.
Submit Absences	Click through a two-step <i>Submit an absence</i> workflow to record any student in the family as absent.
Merge Family	Merge duplicate family records. This family becomes the 'from' family. Learn more about merging duplicate families.

Frequently Asked Questions

Q. What is the difference between "Date Created" and "Registration Date" on the **Summary** tab in a **Family** record?

A. Here are the differences between the *Date Created* and the *Registration Date* on the *Family* record:

Date Created	<p>This is the date the family's record was created in Jackrabbit. This date is located in the bottom left-hand corner of the <i>Family</i> record. The <i>Organization ID</i> is below the <i>Date Created</i>.</p> <p>The date is auto-generated and cannot be changed.</p>
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Registration Date	The date the family was created in Jackrabbit. This date can be changed and updated on the <i>Family</i> record > <i>Summary</i> tab.
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If the *Birth Date* column is highlighted in yellow, this indicates the student's birthday is coming soon.
