The Family Record

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The Family record provides a central location for storing and accessing all family information. Each Family record includes tabs to organize information, action buttons for specific tasks, links to related records or actions, and **User-defined fields** for customization.

The quickest way to access a family's record is by using the **Global Search** field above the main menu. Enter a name, email address, or phone number to locate the Family record. You can also easily navigate to a family's record from the **All Families** or **All Students** pages.

The *Current Balance* displayed on the Summary tab is pulled from the Transactions tab. A **black** balance means a zero balance, a **red** balance indicates an amount 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

Use the blue links to learn more about related topics. The links will open in a new tab or window.

Tab	Description
Summary	The Summary tab summarizes the primary contact's details and key information about the family's students. It includes the main address, displays the registration date, and indicates if the family is a **Problem Account**.
Contacts	Information about the contacts in the Family record, including emergency contact details, is summarized in a grid on the Contacts tab. The View link provides access to additional information about a specific contact and contains their **Parent Portal** access settings.

Tab	Description
Classes	The Classes tab provides details for current, future, and waitlist enrollments and includes the past 10 Enrollments for all students within the family. For details on older past enrollments, see the Student record or use the **Enrollment Detail Report**.
Events	Details of all current and past**event enrollment** for the family are stored on the Events tab. The student's name is displayed when enrollment into the event was by student (versus by family).
Appointments	**View and manage Appointment Bookings**for a family on the Appointments tab.
Transactions	The family's 20 most recent transactions, including fees, payments, and credits, are displayed in a grid on the Transactions tab. The family's entire transaction record is accessible through the View Transaction History button. The View Unapplied Credits & Unpaid Fees button can be used to display a list of credits that have not yet been applied and unpaid fees, which can be helpful when correcting **linking** errors.
Billing Info	The Billing Info tab includes all billing details for a family, such as their credit card or bank account information. It allows you to select **Family Discounts** or **Fixed Fees** that apply to the family's tuition fees or record specific *Billing Instructions*.

Tab	Description
Misc	Additional important family information is stored on the Misc tab, including **Family User-defined Fields** and a family-specific *Parent Portal Login Message*. The View Registrations button allows you to review details of registrations, including policy agreements, completed through the Parent Portal, Online Registration, and Quick Registration. The View Sent Emails button provides access to a history of emails sent to the family. Tip: Some businesses find it helpful to mark families as a *Prospect* for tracking purposes.
Notes	Add, edit, or delete **notes** for a family here. Search, filter by tags, and sort the notes by the *Date Created* or by the *Date Modified*.
Resources	Upload files and add hyperlinks (URLs) as a **Resource** to the Family record, where you can store up to 15MB of data.
Policies	**Policies** tied to a class the family enrolls in are displayed here. The tab shows the number of Policy Groups assigned to the Family record. Each policy indicates whether the family has agreed or needs to agree.

Family Button Descriptions

Use the blue links to learn more about related topics. The links will open in a new tab or window.

Button	Description
Make Sale/Post Fees	Use the Make Sale/Post Fees button to process store sales or **Post Fees** for a family; once posted, fees or sales appear on the family's Transactions tab.
Payment/Credit	**Enter a payment** or **post a credit** for a family with the Payment/Credit button.

Button	Description
Refund	With the Refund button, you can view the Last 20 (Most Recent) Payments a family has made and choose a payment to **refund**.
Statement	Use the Statement button to generate a printed statement or to email a **statement** for an individual family.
Add Student	**Add Students** to the Family record using the Add Student button.
Add Contact	**Add Contacts** to the Family record using the Add Contact button.
Archive Family	Archive a family to your**Lead File** with the Archive Family button.
Family Name	Change the last name on the Family record and choose whether it should apply to students, contacts, or both.
Email	Use the Email button to generate an**email** for the family and select which family members should receive it.
Text	When texting is enabled in Jackrabbit, a Text button allows you to send a **text message** and select which family members should receive it.
Push Notification	With **Jackrabbit Plus**, you can use a Push Notification button to create a push notification and choose which family members should receive the notification.
Email Schedules	**Email** students their current class schedules with the Email Schedules button.

Button	Description
Submit Absences	Use the Submit Absences button to**enter student absences** for any student in the family.
Merge Family	**Merge duplicate** Family records with the Merge Family button. This family becomes the 'from' family.

Frequently Asked Questions

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

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

Date Created	The *Date Created* indicates the date the Family's record is created in Jackrabbit. The date is located at the bottom left-hand corner of the Family record. It is auto-generated and cannot be changed.
Registration Date	The *Registration Date* is automatically assigned as the date the family is created in Jackrabbit, but it can be changed and updated on the Summary tab of the Family record.