

Contact Listing Report

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Contacts in Jackrabbit can be a parent, a grandparent, or any caregiver. Their information is added and stored in the *Family* record.

The **Contact Listing** report provides you with a list of contacts based on filters (Search Criteria) you select.

You can find this report under the *Families (menu) > Family Reports*.

- ★ Customize the list of contacts with several optional filters including the type of contact (Primary, Billing, Authorized), ability to log into Parent Portal, and status of mass email opt-out.
- ★ Send an email to all, or only some, of the families directly from the report results.



Save this as a frequently used report! Click the heart (icon)  next to a report name, the heart will change to red  and the report will be listed under the *Reports (menu) > My Reports* for quick and easy access!

Business Scenario

You would like to find family contacts who are authorized to log into the Parent Portal, but who have never logged in, and send them an email to encourage them to start using the Portal.

To create this report use these two search filters:

- *Family Status* = **Active**
- *Can Login to Portal* = **Yes**

The report results will include all contacts that have *Allow to login to Parent Portal* selected in their *Contact* record. Sort the *Last Login* column to group all contacts who have never logged into their Portal. Select those families using the checkbox in the *Email All* column to send them an email encouraging them to log in.

Search Criteria

You can filter your list of contacts using any or all of the Search Criteria and Jackrabbit will compile a report of contacts who meet ALL of the criteria chosen.

Search Criteria [Favorites](#) [Save Favorites](#) [Refresh](#) [?](#)

Run Contact Listing Report using search criteria below.

Location:

Family Status: **Active**

Primary: Billing: Authorized:

Email:

City: State: Zip:

Contact Birth Month From: Contact Birth Month Through:

Employer: EmployerTitle:

Opted Out from Mass Email:

Date Created From: Date Created Through:

Last Updated From: Last Updated Through:

Date Imported From: Date Imported Through:

Can Login to Portal: **Yes** (if Portal is active)

Member ID:


Display Settings

Show Employer Notes?: **No**

Report Results

The report results can be further customized with the ability to show or hide columns of information, sort columns, or modify column width.

Contact Listing

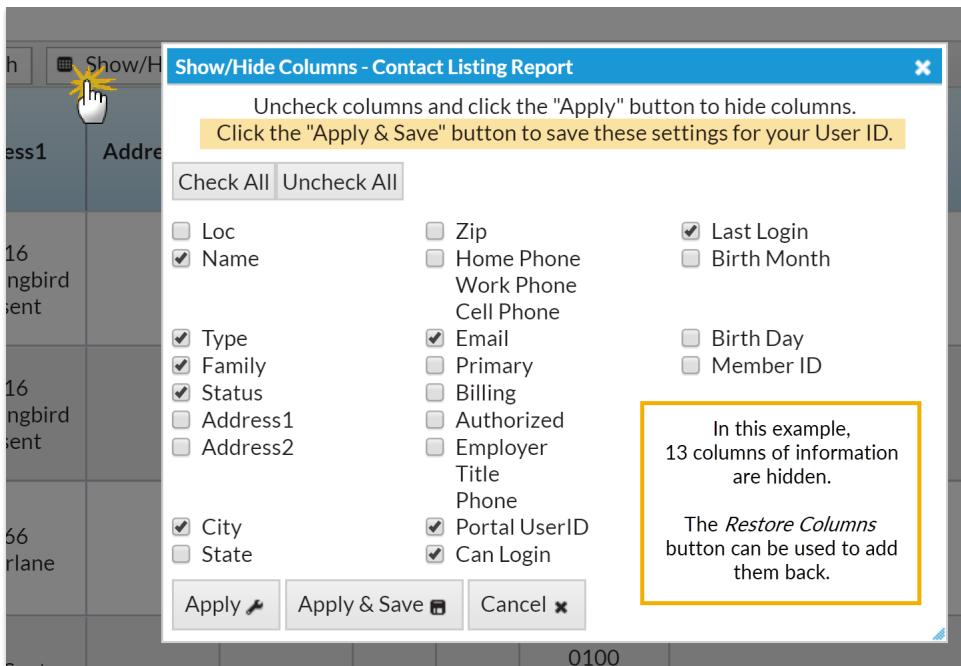
[← RETURN](#) [EMAIL](#) 

View 1 - 24 of 24 [Print](#) [Export](#) [Refresh](#) **13 columns hidden** [Show/Hide Columns](#) [Save Columns](#) [Restore Columns](#)

Name	Type	Family	Status	State	Email	Portal UserID	Can Login	Last Login	Email All
Holly Ager	Mother	Ager	Active	NC	hollyager41@gmail.com	hollyager41@gmail.com	Yes	8/29/2019 5:45:00 AM	<input type="checkbox"/>
Victor Ager	Father	Ager	Active	NC	vicager@email.com	vicager@email.com	Yes	4/10/2018 1:40:00 PM	<input type="checkbox"/>
Janice Brown	Mother	Brown	Active	NC	jbrownsemail@email.com	jbrown@email.com	Yes	5/2/2018 5:28:00 PM	<input type="checkbox"/>
Alane Clements	Mother	Clements	Active	NC	aclements@email.com	aclements@email.com	Yes		<input checked="" type="checkbox"/>

Note: A callout box points to the 'Show/Hide Columns' button with the text: 'Customize your report by selecting which columns of information to display.'

- Email directly from the report results. Use the checkbox in the *Email All* column to select the contacts you would like to email. Click the **Email** button to open the Jackrabbit email editor and select an email template or create a new email message. A history of this email is kept in the *Family* record, *Misc* tab > *View Sent Emails* for 365 days.
- Click the **Show/Hide Columns** button, to select which columns of information you want to be displayed.



- Select **Apply** to have these selections applied to only the report you are currently viewing.
- Select **Apply & Save** to have these selections applied and saved for your User ID. When logged in as your User ID, you will see only the columns of information you chose previously. Other Users will see the columns they selected and saved, which may differ from yours.