

Family Balance Summary Report

Last Modified on 08/30/2022 1:46 pm EDT

The **Family Balance Summary** report provides you with a list of families with basic information and account balances based on filters (Search Criteria) you select.

You can find this report under the **Families** menu > **Family Reports** > **Family Balance Summary**.

- ★ Customize your report to list family balances as of the current date (default setting) or for a historical date.
- ★ Determine inactive families that have balances due.
- ★ 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!

Search Criteria

You can filter your list of families using any or all the Search Criteria, and Jackrabbit will compile a report of families who meet ALL of the criteria selected. For this example, we will filter for Inactive families.

Family Balance Summary

← RETURN SUBMIT

Search Criteria  Favorites  Save Favorites  Refresh 

Search Family Balances using search criteria below.

Location:

Family/Acct Status:

As Of Date: 

Report Results

Review the results and use the checkbox in the last column to select the families to email. Click the *Email* button to quickly generate an email to all or the selected students in the report.

- Use the active links in the report to go to the Family record.
- **Show/Hide** the columns as needed. In this example, 1 column is hidden.
- Report results can be customized with the ability to sort columns, and modify column width.

Family Balance Summary

← RETURN [EMAIL](#)

Use this button to **Show/Hide Columns** in the report.

Click the top checkbox to select all to email.

View 1 - 17 of 17 Print Export Refresh 1 columns hidden Show/Hide Columns Restore Columns

Family/Account	Status	Billing Contact	Billing Email	Primary Phone	Students	Balance	Balance As Of Today	Email All <input checked="" type="checkbox"/>
Avery	Inactive	Laura Avery	lavery@myemail.com	704-555-1111	Lila	212.50	212.50	<input checked="" type="checkbox"/>
Brown	Inactive	Janice Brown	jbrownsemail@email.com	(704) 555-1313	Samantha, Leslie	0.00	0.00	<input checked="" type="checkbox"/>
Campbell	Inactive	Katherine Campbell	kcampbell@email.com	(704) 555-6671	Lena, Sam	30.00	30.00	<input checked="" type="checkbox"/>
Cozy	Inactive	Sara Cozy	saralaprezioso@yahoo.com	(916) 945-1223	Sophia	0.00	0.00	<input checked="" type="checkbox"/>
Evans	Inactive	Taylor Evans	tayevans@email.com	(704) 555-5478	Shawna, Gina	30.00	30.00	<input checked="" type="checkbox"/>
Holland	Inactive	Kate Holland	kholland@email.com	704-336-1111	Alexa	0.00	0.00	<input checked="" type="checkbox"/>
Hunter	Inactive	Jolie Hunter	jhunter@email.com	(704) 555-1248	Jackson	230.00	230.00	<input checked="" type="checkbox"/>

Note: There are two *Balance* columns: *Balance* and *Balance As Of (date)*. The *Balance* column is **not** date-dependent and is the current balance. The *Balance As Of (date)* column is date-sensitive and will vary depending on the search criteria you enter. In this example, **no** *Balance As Of (date)* was entered, and both columns show the same amount.



A history of emails sent from this report is kept in the Family record, Misc tab > View Sent Emails for 365 days.