Work With All Families - View, Search, and Take Action

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Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review **User Permissions for All Families**.

All Families, located in the *Families* menu, generates a list of all active and inactive family records in Jackrabbit. **Lead File** families are not included.

Use optional **data visuals** to view key information at a glance with interactive charts.

Drill down to specific families **using filters** organized in a slide-out filter drawer.

Save your **favorite view** (filters, selected columns, etc.) as your default view.

Display a list of families in a **powerful grid**: you can group, sort, and customize the information.

Take Action - **add a new family,** send a message, **work with a single family,** or **apply a mass action to multiple families** at once.

Sample All Families Grid

1️⃣ Breadcrumbs display the currently selected filters.

2️⃣ Data Visuals provide family information at a glance.

3️⃣ Open filters (filter drawer), Save as favorite, Favorites, Hide/Show Data visuals.

4️⃣ Adjust columns, Send a Message, Refresh Grid, Add New Family, and More.

5️⃣ Column Search - enter a search term in the search field.

6️⃣ Row Menu - use the row menu to perform an action for an individual family.

Click the Adjust columns icon to squeeze the grid columns closer together. You will be able to see all the columns in the grid.

Expand/Collapse All

Data Visuals - Key Information at a Glance

Data visuals (charts) provide a quick view of key information about your families. The elements included in the data visuals are predefined by Jackrabbit.

The *All Families* data visuals are interactive and can be hidden. Use the **Hide/Show Data visuals** icon to toggle back and forth.

Locations	If you have multiple Locations in your database, this element will display the proportion of families in each Location.
	7 Hover to see the number of families in each Location.
	8 Click on a segment of the chart and the exact number of families in that segment displays. As well, the families in the grid are filtered for the selected segment, and the breadcrumbs display that filter. Use the red **x** next to the filter in the breadcrumbs to remove it and reset the list of families.
Status	The number of active vs. inactive families is shown in this data visual.
	9 Hover to see the number of active or inactive families.
	10 Click on a segment of the chart and the exact number of families in that segment displays. As well, the families in the grid are filtered for the selected segment, and the breadcrumbs display that filter. Use the red **x** next to the filter in the breadcrumbs to remove it and reset the list of families.
Accounts Receivable	The number of families with unpaid fees (Accounts Receivable) will display as a fraction of all families, e.g., 11/31. The chart breaks those families down by the age of the fees owed.
	11 Hover to see the number of families in each segment.
	12 Click on a segment of the chart and the exact number of families in that segment displays. As well, the families in the grid are filtered for the selected segment, and the breadcrumbs display that filter. Use the red **x** next to the filter in the breadcrumbs to remove it and reset the list of families.
	13 Links are provided to easily access the families with the highest *Top 5 Balances.*

Policy Status	The chart breaks down all families by the status of their signed **legal policy** agreements:
	- Have agreed to all current policies *- Have not agreed to all current policies*
	(14) Hover to see the number of families in each segment.
	(15) Click on a segment of the chart and the exact number of families in that segment displays. As well, the families in the grid are filtered for the selected segment, and the breadcrumbs display that filter. Use the red **x** next to the filter in the breadcrumbs to remove it and reset the list of families.
ePayment Status	Families are grouped by the ePayment method on file:
	- Has both CC and ACH *- Only has CC on file* *- Only has ACH on file* *- No ePay Methods*
	(16) Hover to see the number of families in each segment.
	(17) Click on a segment of the chart and the exact number of families in that segment displays. As well, the families in the grid are filtered for the selected segment, and the breadcrumbs display that filter. Use the red **x** next to the filter in the breadcrumbs to remove it and reset the list of families.

Use Filters to Search for Specific Families

Select the **Filter** icon to open the Filter Drawer. The Filter Drawer houses various criteria to help you drill down to specific families, for example, to list all inactive families or find families with more than two students.

Each filter you select will narrow the results down further.

(18) Once filters are selected and applied, they will appear in the breadcrumbs. Use the red **x** next to a filter in the breadcrumbs to clear it and refresh the displayed families.

(19) Filters are grouped and organized into sections for ease of use and pull information from the various tabs in the *Family* record.

(20) Use the arrow (>) to expand a section to see the filters within, or use the *Expand All/Collapse All* option at the top of the Filter Drawer.

21 Search for a filter by entering a keyword in the search box at the top of the Filter Drawer. For example, enter "ePay" to quickly locate and navigate to the ePayment Method filter in the *Financial Details* section.

22 Select date fields by clicking on the calendar icon or manually enter dates.

Save your Favorite Filtered Grid Views

Save time and effort each time you open a grid page to view your data! After you have applied filters or clicked on a data visual, set the grid column widths, and you can save the filtered data as a Favorite.

Saved favorites can be set as a default view and shared with other Jackrabbit Users in your organization. There is no limit to the number of filtered grid views you can save.

Save a Favorite	Once filters are selected, it's simple to save your favorite views:
	
	23 Filter the grid for the information you are looking for.
	
	    24 Use the *filter (icon)* or click on a data visual.
	
	    25 Adjust column widths as needed.
	
	26 Click the **Save as favorite** (icon) .
	
	    27 Enter a favorite name.
	
	    28 Select if you want to set the favorite as the default view. This view will automatically load when you return to the page.
	
	    29 Select if you want to share with your team.
	
	30 Click **Save**. Your filtered data, column width, and column-locked positions are all saved.

Open a Favorite	Load or open a saved favorite: **31** Click the **Favorites** (icon) . **32** Select your saved favorite from the drop-down list or start typing in the search field. **33** Choose one of the saved views and click **Load.** The grid populates the data, and the breadcrumbs indicate the selected filters. If you opened a saved favorite grid view and would like to make it your default view, resave it as a favorite and toggle the *Make this your default view?* to the right. Click **Save**.

Delete a Favorite	If you created a Favorite, you will be able to delete it: ㉞ Click the **Favorites** (icon) . ㉟ Select the favorite you would like to delete. ㊱ Click **Delete**.

Contact Jackrabbit Support if you want to delete a Favorite filtered view created by another User.

Work with the Information in the Grid (Table)

Jackrabbit grids, located throughout the system, are very powerful and allow you to group and sort your data to customize how your results are displayed. Each grid has core features, such as grouping data by dragging a column to the grouping bar. Row menus and column menus offer different options depending on the grid.

Learn more about working with grids.

Use *Column Search* to quickly find information in a column. For example, enter a family last name or part of a name, and all the matches will populate in the grid. Use the red **x** to clear the information in the search field.

Add a New Family

Use the **Add New Family** (icon) to open the **Add Family** window. We recommend you always select the *Use Quick Registration Form* button whenever possible. This allows you to add all the new family information, including students, and sign them up for classes at the same time.

You also have the option to add a family account 'on the fly' with just their name, location, and registration date when you click on the **Enter Family Name Only** link.

To accommodate different workflows, the Quick Registration form can also be accessed directly from the *Families* (menu).

Take Action for an Individual Family

Use the row   menu to edit that row and access options for working with an individual family. Click on the icon, and a new browser tab or pop-up window will open depending on the action you select.

Click directly on the row menu   for the family you want to work with; do not use the checkbox in the 1st column. When any checkboxes (for use with mass actions) are selected in the 1st column, the row menus are deactivated and won't display.

- **37** **View/Edit** - opens the *Family* record
- **38** **Post Fees -** opens the *Make Sale/Post Fees* page
- **39** **Accept Payment/Post Credit** - opens the *Payment Transaction Entry* page
- **40** **Add a Note** - opens the *Add a note* window

The *Send Message (icon)* can be used to send **emails**, **text messages**, and **push notifications** (through the Jackrabbit Plus mobile app) to individuals or multiple families.

Take Action for Multiple Families (Mass Actions)

Choose one of these options to select families and perform a mass action:

- **41** **Select all families** - leave the checkbox in the 1st column unchecked, and all families in the grid are selected. You will be able to *Send a Message, Refresh the Grid, Add a New Family,* and perform all the mass actions in the drop-down list, including *Print* and *Export to Excel.*
- **42** **Select specific families** - in the 1st column, select the checkboxes for the families you want to work with. You will be able to *Send a Message* and perform all the mass actions in the drop-down list shown.

- **43** **Current families displayed on the page (max. 250/page)** - select the checkbox in the 1st column header. You will be able to *Send a Message* and perform all the mass actions in the drop-down list shown below.

Mass Actions

Send a Message - Choose to send an **email**, **push notification**, or **text message** to chosen recipients in the selected records, e.g., Primary Contacts only or Primary, Billing, and Other Contacts.

- **44** Select the checkbox for the families you want to be included in the message. You can select individual families across multiple pages.

- **45** To send to all families currently displayed on a page (max 250/page), select the checkbox in the column header.

- **46** To send to ALL families on ALL pages, leave all checkboxes empty. All families will be included.

ePayment Schedule - Update the **ePayment Schedule** (choosing from a drop-down list) or remove the existing ePayment Schedule from the selected family records. Click Update.

Family Discount - Update the **Family Discount** (amount, expiration date, and discount type) or remove the existing Family Discount from the selected family records. Click Update.

Family Fixed Fee - Update the **Family Fixed Fee** (amount, expiration date, and Category 1) or remove the existing Family Fixed Fee from the selected family records. Click Update.

Membership Type - Update the Membership Type (choosing from a drop-down list) or remove the existing Membership Type from the selected family records. Click Update.

Clear UDF Answers - Clear the **User-defined fields** for the selected families. Click Clear.

Print - Open a print window to print the family information in the grid (max. 250 rows) or save it as a file for future use. The print option is only available when the checkboxes remain unselected in the 1st column of the grid.

Export to Excel - Download an Excel file of all the filtered information in the grid to your computer. The export option is only available when the checkboxes remain unselected in the 1st column of the grid. All families in the grid will be included (no maximum).

Family information in the *All Families* grid lives in the **Family record**. Click a *Family* link in the grid to open the family's individual record.