Contact Listing Report

Last Modified on 11/03/2020 12:33 am EST

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 $earch Criteria) you select.

You can find this report in the *Reports* menu. Go to the *Reports (menu) > Find Reports > Families/Students (tab) > Families > Contact Listing.*

- Customize the list of contacts with several optional filters including: 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.

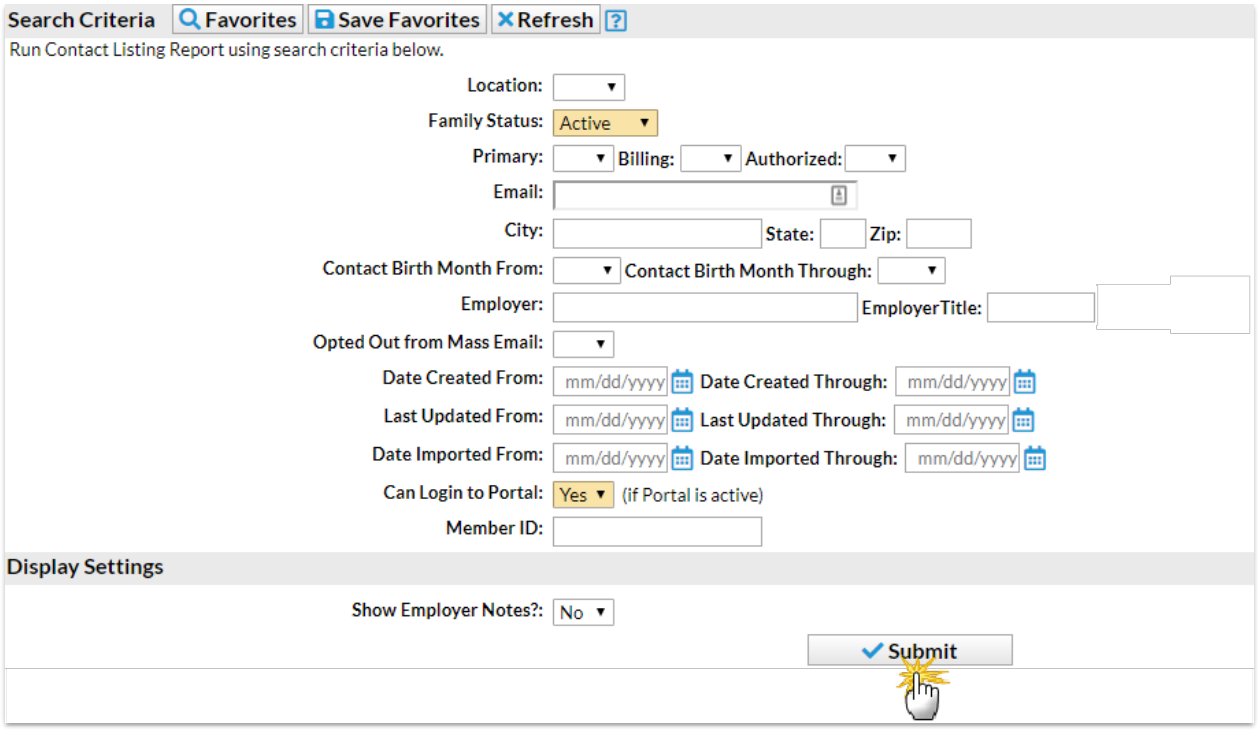
To create this report use these two search filters:

- *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.

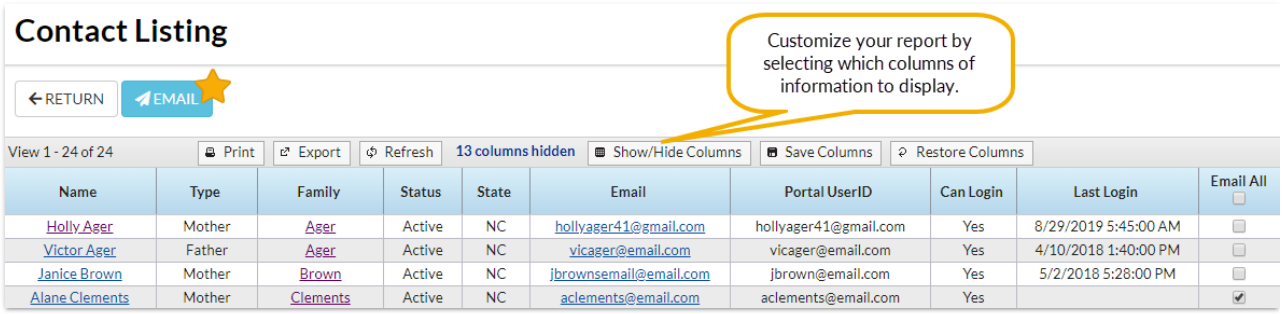
Search Criteria

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.

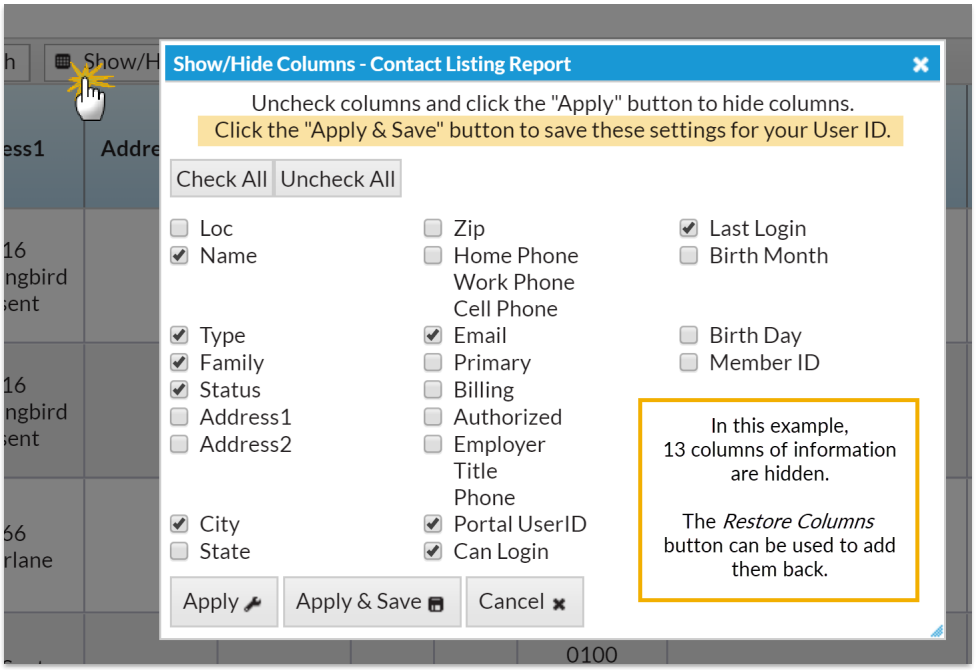


Report Results

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



- 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 180 days.
- Click the **Show/Hide Columns** button, to select which columns of information you want 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.