


The Family Record

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The Family record provides a centralized area to keep all information related to a specific family. It's like a file cabinet, it stores and organizes important information.

You can access a Family record from the following locations in Jackrabbit:

- *Families (menu) > All Families* and click on a family name to open the record.
- *Families (menu) > All Families > row menu*  *> View/Edit* to open the record.

Refer to [Work with All Families - View, Search, and Take Action](#) for more information on the *All Families* grid.

In the Family record, the information is grouped and organized on different **tabs**. **Buttons** allow you to perform an action for the family, for example, post a fee, and many links are provided throughout the record for convenient access to additional relevant information. Other links can be used to do things like enrolling a student.

Family: Ager

← RETURN

SAVE CHANGES

DELETE

Make Sale/Post Fees

Payment/Credit

Refund

Statement

Add Student

Add Contact

Archive Family

Family Name

Email

Email Schedules

Submit Absences

Merge Family

Summary

Contacts

Classes

Events

Transactions

Billing Info

Misc

Notes (0)

Resources (1)

View 1 - 2 of 2

Primary Contacts



Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Holly Ager	Mother	(704) 374-2415		(704) 374-2415	hollyager41@gmail.com	Yes	Yes	hollyager41@gmail.co	9/16/2020 3:47:00 PM
Victor Ager	Father	(704) 374-2415		(704) 374-2415	agingvictor@gmail.com	No	Yes	agingvictor@gmail.co	2/4/2020 3:44:00 PM

View 1 - 3 of 3


Students

Print

Refresh

First Name	Last Name		Activi	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Barbie	Ager		Enroll	Y	Female	11/17/2011	9 yrs		Ballet - Beg - F(Ashley S.)(100)	1	
Dani	Ager		Enroll	N	Female	7/11/2002	18 yrs			0	
Dave	Ager		Enroll	N	Male	7/11/2002	18 yrs			0	

Current Balance 0.00

☐ Problem Account 

Location

EDU

Status

Active

Registration Date

2/16/2018

Home or Primary Phone

(704) 374-6545

Address 1

1105 Holly Lane

Address 2

City

Cornelius

 State

NC

 Zip

28031

Neighborhood

Account#

Family ID

LINKS on the page allow you to perform ations or access additional information.

Expand each section to see the *Family* record tab and button descriptions.

Family Tab Descriptions

Summary	Contacts	Classes	Events	Transactions	Billing Info	Misc	Notes (2)	Resources (1)
Summary	The <i>Summary</i> tab offers a summary of details for the primary contact and displays key information about the students in the family. The main address is stored on this tab, the registration date is displayed, and if the family is a Problem Account , it is designated here.							
Contacts	Information about the contacts in the Family record, including emergency contact details, is summarized in a grid on the <i>Contacts</i> tab. Use the View link to see additional information about a specific contact or control their Parent Portal access.							
Classes	The <i>Classes</i> tab provides details for the current and future enrollments for all students within the family as well as the 10 most recent past enrollments. For details on older past enrollments see the <i>Student</i> record or use the Enrollment Detail Report .							
Events	The <i>Events</i> tab stores all current and past event enrollment details for the family. When enrollment into the event was by student (versus by family), the student's name is shown.							
Transactions	The <i>Transactions</i> tab displays the 20 most recent transactions for a family (fees, payments, and credits). Click View Transaction History for the family's entire transaction record. View Unapplied Credits & Unpaid Fees displays a listing of these type of transactions which can be helpful when correcting linking errors.							
Billing Info	The <i>Billing Info</i> tab contains all of the billing details that have been set for a family such as credit card/bank account information, Family Fixed Fees , and details about any discounts to be applied to tuition fees.							
Misc	More important family information is stored on the <i>Misc</i> tab, including Family User-defined Fields and the date of the family's last agreement to your legalese. See details of registrations done through the Parent Portal, Web Registration, and Quick Registration (<i>View Registrations</i> button) and review a history of emails sent to the family (<i>View Sent Emails</i> button).							
Notes	Add, edit, or delete notes for a family here. Search notes, filter the notes by tags, and sort the notes by the date created or by the date modified. Learn more about Notes in Jackrabbit .							
Resources	Upload files and add hyperlinks (URLs) to the family's record. Store up to 15MB of data. Learn more about Resources in Jackrabbit							

Family Button Descriptions

Use the *Make Sale/Post Fees* button to post fees or make a store sale to a

Make Sale/Post Fees	family. Once a fee or sale has been posted, it is visible under the family's <i>Transactions</i> tab. Learn more about posting fees.
Payment/Credit	Use the <i>Payment/Credit</i> button to enter a payment the family made or post a credit to a family. Learn more about entering payments and posting a credit.
Refund	View the last 20 payments a family has made and choose a payment to refund. Learn more about refunds.
Statement	Print or email a statement for an individual family. Learn more about statements.
Add Student	Add students to the Family record.
Add Contact	Add contacts to the Family record.
Archive Family	Archive a family to your Lead File. Learn more about the Lead File.
Family Name	Use this button to change the last name on the Family record and select if it should apply to students, contacts, or both.
Email	Generate an email to the family and select which members of the family should receive it. Learn more about emailing in Jackrabbit.
Email Schedules	Email the current class schedules for all active students in the family Learn more about emailing student schedules.
Submit Absences	Click through a two-step <i>Submit an absence</i> workflow to record any student in the family as absent.
Merge Family	Merge duplicate family records together. This family becomes the 'from' family. Learn more about merging duplicate families.



If you notice a birthday in the *Birth Date* column highlighted in yellow, this indicates the student's birthday is coming up soon.