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

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> Permissions control the ability for 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.

- ⭐ Optional **data visuals** offer key information at a glance with interactive charts.
- ⭐ Drill down to specific families **using filters** organized in a slide out filter drawer.
- ⭐ Save and load your **favorite views**.
- ⭐ List of families display 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

1 - Breadcrumbs display the currently selected filters.

2 - Data Visuals provide family information at a glance.

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

4 - Send Message (email/texts), Refresh Grid, Add New Family, More (actions that can be taken with one or more families).

5 - Column Search - enter a search term in the search field. The column will be searched for results containing that term.

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

Expand each section below for more information on the All Families grid.

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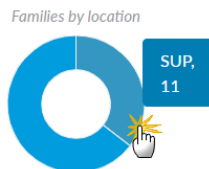
The *All Families* data visuals are interactive and can be hidden. Use the **Hide/Show Data visuals** 📊 icon to toggle back and forth.

Locations

Families by location

SUP, 11

If you have multiple Locations in your database, this element will display the proportion of families in each Location.

- Hover to see the numbers of families in each Location.
- 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

Families by status
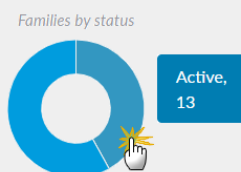
Active, 13

The number of active vs inactive families is shown in this data visual.

- Hover to see the number of active or inactive families.
- 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.
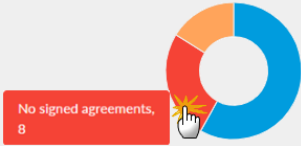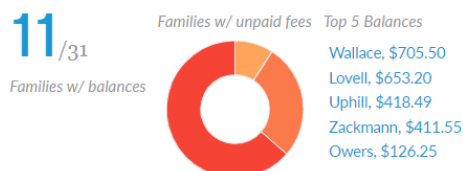
Accounts Receivable

11/31
Families w/ balances

Families w/ unpaid fees   *Top 5 Balances*

Wallace, $705.50
Lovell, $653.20
Uphill, $418.49
Zackmann, $411.55
Owers, $126.25

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.

- Hover to see the numbers of families in each segment.
- 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.
- Links are provided to easily access the families with the

Policy Status	
Families by signed policy agreements No signed agreements, 8	The chart breaks down all families by the status of their signed policy agreements: - *Agreements dated w/last 12 months* - *Agreements older than 12 months* - *No signed agreements* • Hover to see the numbers of families in each segment. • 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 by ePayment status Only has CC on file, 18 families	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* • Hover to see the numbers of families in each segment. • 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.
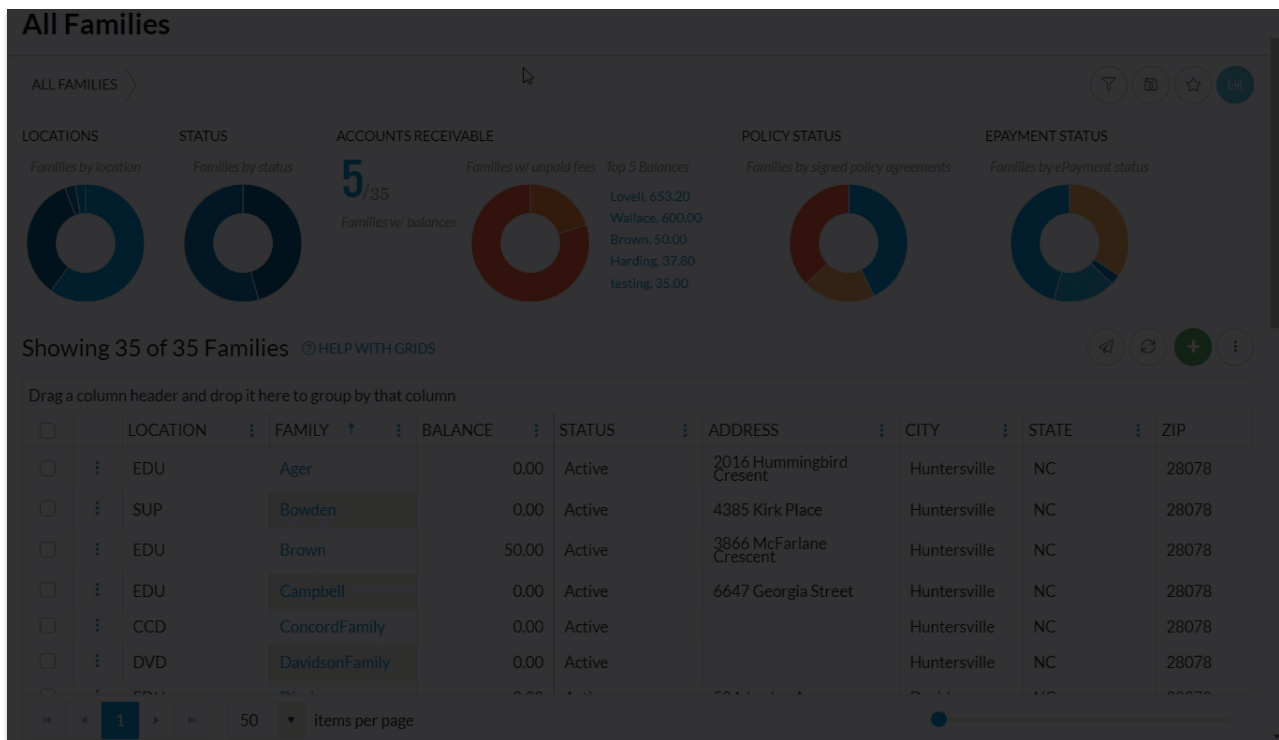
Each filter you select will narrow the results down further.

- 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.

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

- 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.

- 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.

Save & Load Your Favorite Views

As shown in the section above, the filter functionality in the grids can simplify how you view your data. Once you have applied filters or clicked on a data visual to filter your data, it's easy to save a favorite and select the saved view as the default for your page.

Refer to our **Save Your Favorite Views in Jackrabbit Grids** video for more details.

	Once filters are selected, it's simple to save your favorite views:
	1. Filter the grid for the information you are looking for. Use the *filter (icon)* ▽ or click on a data visual.
Save a Favorite	2. Click the **Save as favorite** (icon) 🖫 . ○ Enter a favorite name.

	○ Select if you want to set the favorite as the default view. This view will automatically load when you return to the page. ○ Select if you want to share with your team. 3. Click **Save**. Your filtered data, column width, and column locked positions are all saved.
Open a Favorite	Load or open a saved favorite: 1. Click on the **Favorites** (icon) ☆ . 2. Select your saved favorite from the drop-down list or start typing in the search field. 3. Choose one of the saved views and click **Load.** The grid populates the data and the breadcrumbs indicate the selected filters.

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 the way 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 ⊕ icon to add a new family. Although you can add a family 'on the fly' with just their name, location, and registration date, we recommend using the *Quick Registration Form* which allows you to add all information, including students, at the same time.

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 a single row and access options for working with an individual family in the grid. A new browser tab or window will open for each option you chose and you can take action and then easily navigate back to the grid.

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

- **View/Edit** - opens the *Family* record
- **Post Fees -** opens the *Make Sale/Post Fees* page
- **Accept Payment/Post Credit** - opens the *Payment Transaction Entry* page
- **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 Mobile Inventor) to individual or multiple families.

Take Action for Multiple Families (Mass Actions)

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

- **Select all families** - leave the check box 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.*

- **Select specific families** - in the 1st column, select the check boxes 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.

	LOCATION	FAMILY ↑	BALANCE	STATUS	ADDRESS	CITY	STATE	ZIP	
☑	EDU	Agar	363.05	Active	234 Eldridge Lane	Huntersville	NC	28078	
☐	EDU	Ager	106.00	Active	1105 Holly Lane	Cornelius	NC	28031	
☑	EDU	Alberts	0.00	Active	4897 Holt Street	Davidson	NC	28036	(704) 999-2485
☑	EDU-CH	Alperi	148.67	Active	209 Cardinal Avenue	Cornelius	NC	28031	(704) 555-7136
☐	EDU	Ashton	229.67	Active	9883 Annabelle Lane	Davidson	NC	28036	(704) 333-8259

3 Selected CLEAR SELECTIONS

Drag a column header and drop it here to group by that column

Drop-down list: ePayment Schedule / Family Discount / Family Fixed Fee / Membership Type / Clear UDF Answers

- **Current families displayed on the page (max. 250/page)** - select the check box 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.
	• Select the check box for the families you want included in the message. You can select individual families across multiple pages.
	• To send to all families currently displayed on a page (max 250/page) select the check box in the column header.
	• To send to ALL families on ALL pages, leave all check boxes 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 check boxes 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 check boxes 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.