

# Family Balance Summary Report

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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 in the *Reports* menu. Go to **Reports > Families / Students > Recommended (tab) > Family Balance Summary**.

- ★ Customize your report to list family balances as of the current date (default setting) or for a historical date. For example, month end or year end.
- ★ Filter the report by Family/Acct Status.
- ★ Send an email to all, or only some, of the families directly from the report results.



If you use this report frequently, make it a [Favorite Report](#) for quick and easy access!

## Business Scenario

You would like to know how many inactive families have balances on their account. For the inactive families who have outstanding balances, you want to send a reminder email that payment is due.

To create this report, select the following Search Criteria: *Family/Acct Status: Inactive*.

## 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.


A screenshot of a web form titled "Search Criteria". At the top, there are four buttons: "Favorites" (with a magnifying glass icon), "Save Favorites" (with a floppy disk icon), "Refresh" (with an 'X' icon), and a help icon (?). Below the buttons, the text reads "Search Family Balances using search criteria below." The form contains three fields: "Location:" with a dropdown arrow, "Family/Acct Status:" with a dropdown menu showing "Inactive", and "As Of Date:" with a text input field containing "mm/dd/yyyy" and a calendar icon. At the bottom right, there is a "Submit" button with a checkmark icon and a hand cursor pointing to it.

## 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.

**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.

### Family Balance Summary

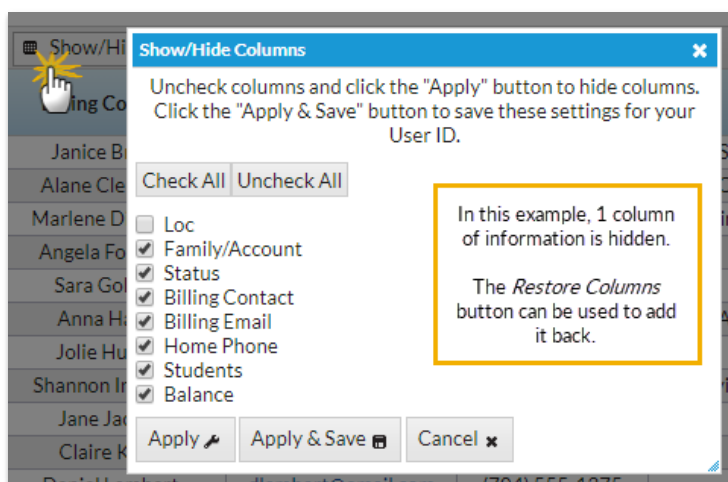
← RETURN   EMAIL 

View 1 - 18 of 18   Print   Export   Refresh   1 columns hidden   Show/Hide Columns   Restore Columns

Family/Account	Status	Billing Contact	Billing Email	Home Phone	Students	Balance	Balance As Of Today	Email All <input checked="" type="checkbox"/>
<a href="#">Brown</a>	Inactive	Janice Brown	<a href="mailto:jbrowsemail@email.com">jbrowsemail@email.com</a>	(704) 555-1313	Samantha, Leslie	635.00	635.00	<input checked="" type="checkbox"/>
<a href="#">Clements</a>	Inactive	Alane Clements	<a href="mailto:aclements@email.com">aclements@email.com</a>	(704) 555-0100	Caroline, Debbie	446.88	446.88	<input checked="" type="checkbox"/>
<a href="#">Dierksen</a>	Inactive	Marlene Dierksen	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-4446	Cindy, David, Dylan	634.24	634.24	<input checked="" type="checkbox"/>
<a href="#">Fontaine</a>	Inactive	Angela Fontaine	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-7978	Gina, Emilio	270.00	270.00	<input checked="" type="checkbox"/>
<a href="#">Golding</a>	Inactive	Sara Golding	<a href="mailto:sgolding@email.com">sgolding@email.com</a>	(704) 555-4748	Betty	90.00	90.00	<input checked="" type="checkbox"/>

*Customize your report by selecting which columns of information to display.*

- 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 365 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.