

The Family Record

Last Modified on 06/02/2021 12:09 pm EDT

The Family record provides a centralized area to house and reference all information related to a specific family (or account). Each family page has its own **tabs, buttons, links, and user-defined fields**.



The terms Family and Account may be used interchangeable in Jackrabbit.

Family: Adams

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SAVE CHANGES
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Make Sale/Post Fees
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Summary
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Notes (1)
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Primary Contacts

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Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Logir	PIN	Portal UserID	Last Login
Maria Adams	Mother	(604) 111-2222			xcav.carlson@gmail.com	Yes	Yes	1006	madams01	4/23/2020 9:35:00 AM
Henry Adams	Father					No	Yes	1047		

Students

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First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Enrolled Classes	F. Enroll	Wait
Baby	Adams	Schedule	Y	Female	8/8/2017	2 yrs, 9 mths	Daily Free Program 2:30PM-3:00PM(Bo P)	0	
Pugsley	Adams	Schedule	Y	Male	12/30/2012	7 yrs, 5 mths	1st grade Before School Program M-F 7:00am-8:30am2019(Mary P) (200), Daily Free Program 2:30PM-3:00PM(Bo P)	0	
Wednesday	Adams	Schedule	Y	Female	4/13/2010	10 yrs, 1 mths	Daily Free Program 2:30PM-3:00PM(Bo P)	0	

Current Balance **0.00** Problem Account ?

Location Main v

Status Active v

Payer Type Family v

Registration Date 12/30/2015 📅

Home or Primary Phone (604) 111-2222 📞

Address 1 1-202 West Rd

Address 2

City Pitt Meadows v Prov British Columbia v Post Code V3Y0B4

Neighborhood

Account#

Family ID

Balance Date ?

Last Updated: 5/11/2020
Date Created: 12/30/2015 by CAYC
Id: 10987022

Buttons allow you to perform specific actions for a family.

Tabs provide you with information about a family. The Summary tab is shown here.

Links can perform actions or open new information and take you to other screens.

Jackrabbit creates a unique Family ID# for each family account. This ID# can be used when merging accounts.

Family Tab Descriptions

Tabs in the Family record allow a user to see and work with specific details related to a family.

Summary	Contacts	Schedules	Events	Transactions	Billing Info	Misc	Notes (1)	Resources (0)
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Summary

A summary of the family information, including important *Primary Contact* Information and key *Student* Information.

Contacts

Contacts are not limited to a student's parents and can be customized. Additional *Contact Types* are created using **Tools > Edit Settings > Drop-down Lists**. A summary of contact details is available on the *Contacts* tab. Click the **View** link to view information about a specific contact. Emergency contact information is also listed on the *Contact* tab.

Schedules

The *Schedules* tab screen provides details for all current and future enrollments for all students within the family. For details on past enrollments see the *Student* record or use the **Enrollment Detail Report**.

Events

The *Events* tab screen provides all current & past event enrollment details for the family. Where enrollment has been by the student (versus by family) the student's name is shown.

Transactions

The *Transactions* tab screen previews the last 20 (most recent) transactions (fees/charges & payments) for a family. Clicking **View Transaction History** provides the family's entire transaction record. Clicking **View Unapplied Credits & Unpaid Fees** displays a listing of transactions which can be helpful when correcting linking errors.

Billing Info

The *Billing Info* tab contains all of the billing details that have been set for a family.

Misc

The *Misc* tab offers any other recordable family information. Click the **View Registrations** button to view any parent portal, web registration, or quick registration details for a family. *Only registrations with an email address are maintained in this area*. Click **View Sent Emails** to see the email history for the last 365 days.

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**.



Notes (400 character limit) entered on the *Notes* field on the *Misc* tab are private and are



NOT viewable by the family when they are logged into their Parent Portal.

Resources

Upload files and add hyperlinks (URLs) to the family's record. Store up to 15MB of data.

Family Button Descriptions

Buttons in the Family pages allow you to perform specific actions for a family (post fees, enter payments, etc.).



Make Sale/Post Fees

The *Make Sale/Post Fees* button is one of the ways a user can post fees to a family. Clicking *Post Fees* brings up a *Post Fees* screen. After entering the fee details, remember to **Save Changes**. Once a fee has been posted, it is visible under the Family's *Transactions* tab.

Payment/Credit

Use the *Payment/Credit* button to enter a family's payment. Clicking the *Payment* button brings up the *Payment Transaction Entry* screen.

Refund

The *Refund* button opens a screen showing the last 20 payments a family has made and allows a user to choose a payment to refund. For more information on using the Refund button, reference the [Post / Enter a Refund](#) topic.

Statement

Print or email a statement for an individual family using the *Statement* button.

Add Student

Click the **Add Student** button to add a student directly to a family. Enter the student's first name, last name, gender, and birth date and **Submit**.

Add Contact

Add additional contacts to a family using the *Add Contact* button.

Archive Family

Use the **Archive Family** button to archive a family to your Lead File. See the [Lead File](#) topic for more

information.

Family Name

Use this button to rename a family. In the *Rename Family pop-up* box, enter the new name and indicate who the change should apply to. **Save Changes**.

Email

Use the *Email* button to email a family. Once clicked, all email addresses associated with a family will appear in a pop-up window. Check the email addresses intended for the email and **Submit**. The *Email Families* editor screen will appear. Choose an *Email Template* or create the email. Click **Preview Email List**. Click **Send Email** to send the email.

Email Schedules

From the *Family* record, click the **Email Schedules** button to email the current class schedules for all active students in the family. Optionally, you can email schedules to multiple families from *Tools > Students > Email Student Schedules*. See [Email Student Schedules](#) for more information.

Merge Family

Use the *Merge Family* button to set the family as the *From* family and initiate the merge of the family record into a duplicate family record. See the [Merge Duplicate Family Records](#) topic for details on how to merge family records.

Links

Blue links are clickable and can perform an action or open new information. (Once a link has been clicked on, the color changes to purple.)

User-defined Fields

There are five user-defined fields available in a Family's *Misc* tab. These fields can be used to record specific information important to your organization. Ensure that you have consistent information entered for accurate searching using *Families > Search*. Edit the *User-defined Field* names, using **Tools > Edit Settings**. Choose *User-defined Fields* from the left menu.

User-defined Fields can be used to capture information during online web Registration. To learn more about how your organization can utilize User-defined fields on the online registration form, please refer to [Web Reg Form: Field Options / Labels](#).

User-defined Fields can also be used on the Parent Portal. Refer to [Set Up the Parent Portal](#) page.



You are able to clear the information captured in the user-defined fields in mass



from the *Families* menu > *Clear UDF Answers*. This will update family information by clearing the answers in the User-defined field on the Family Misc tab for **all** families. The User ID must have the family's permission *Clear Answers in Student User-defined Fields (UDF)*.
