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

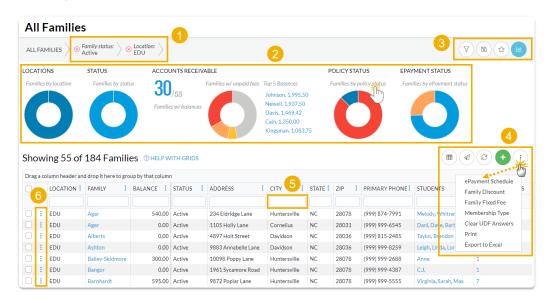


Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review **User Permissions for All Families**.

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.

- ★ Use optional data visuals to view key information at a glance with interactive charts.
- rill down to specific families using filters organized in a slide-out filter drawer.
- * Save your favorite view (filters, selected columns, etc.) as your default view.
- nisplay a list of families in apowerful 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/Show Data visuals.
- 4 Adjust columns, Send a Message, Refresh Grid, Add New Family, and More.
- 5 Column Search enter a search term in the search field.
- 6 Row Menu use the row menu to perform an action for an individual family.



Click the Adjust columns icon to squeeze the grid columns closer together. You will be able to see all the columns in the grid.

O Data Visuals - Key Information at a Glance

Expand/Collapse

- **○** Use Filters to Search for Specific Families
- **⊘** Save your Favorite Filtered Grid Views
- **⊘** Work with the Information in the Grid (Table)
- **⊘** Take Action for an Individual Family