

Family Balance Summary Report

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 under the **Families** menu > **Family Reports** > **Family Balance Summary**.

- ★ Customize your report to list family balances as of the current date (default setting) or for a historical date.
- ★ Determine inactive families that have balances due.
- ★ Send an email to all, or only some, of the families directly from the report results.

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. For this example, we will filter for Inactive families.

Family Balance Summary

← RETURN

Search Criteria

Search Family Balances using search criteria below.

Location:

Family/Acct Status:

As Of Date:

Report Results

Review the results and use the checkbox in the last column to select the families to email. Click the *Email* button to quickly generate an email to all or the selected students in the report.

- Use the active links in the report to go to the Family record.
- **Show/Hide** the columns as needed. In this example, 1 column is hidden.
- Report results can be customized with the ability to sort columns, and modify column width.

Family Balance Summary

← RETURN **EMAIL**

Use this button to **Show/Hide Columns** in the report.

Click the top checkbox to select all to email.

View 1 - 17 of 17 Print Export Refresh 1 columns hidden Show/Hide Columns Restore Columns

Family/Account	Status	Billing Contact	Billing Email	Primary Phone	Students	Balance	Balance As Of Today	Email All <input checked="" type="checkbox"/>
Avery	Inactive	Laura Avery	lavery@myemail.com	704-555-1111	Lila	212.50	212.50	<input checked="" type="checkbox"/>
Brown	Inactive	Janice Brown	jbrownsemail@email.com	(704) 555-1313	Samantha, Leslie	0.00	0.00	<input checked="" type="checkbox"/>
Campbell	Inactive	Katherine Campbell	kcampbell@email.com	(704) 555-6671	Lena, Sam	30.00	30.00	<input checked="" type="checkbox"/>
Cozy	Inactive	Sara Cozy	saralaprezioso@yahoo.com	(916) 945-1223	Sophia	0.00	0.00	<input checked="" type="checkbox"/>
Evans	Inactive	Taylor Evans	tayevans@email.com	(704) 555-5478	Shawna, Gina	30.00	30.00	<input checked="" type="checkbox"/>
Holland	Inactive	Kate Holland	kholland@email.com	704-336-1111	Alexa	0.00	0.00	<input checked="" type="checkbox"/>
Hunter	Inactive	Jolie Hunter	jhunter@email.com	(704) 555-1248	Jackson	230.00	230.00	<input checked="" type="checkbox"/>

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.



A history of emails sent from this report is kept in the *Family* record, *Misc* tab > *View Sent Emails* for 365 days.