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.

⭐ Drill 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.

⭐ Display a list of families 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/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.

⊙ Data Visuals - Key Information at a Glance

⊙ Use Filters to Search for Specific Families

⊙ Save your Favorite Filtered Grid Views

⊙ Work with the Information in the Grid (Table)

⊙ Add a New Family

⊙ Take Action for an Individual Family

⊙ Take Action for Multiple Families (Mass Actions)

Expand/Collapse All