

# 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


The screenshot shows the 'All Families' interface with the following components:

- 1**: Breadcrumbs showing 'Family status: Active' and 'Location: EDU'.
- 2**: Data Visuals section with charts for 'Families by location', 'Families by status', 'Accounts Receivable' (30/55), 'Families w/ unpaid fees', 'Top 5 Balances' (listing Johnson, Newell, Davis, Cain, Kingsman), 'Policy Status', and 'EPayment Status'.
- 3**: Filter drawer and utility icons (search, refresh, favorite, etc.).
- 4**: Action menu for the table (ePayment Schedule, Family Discount, etc.).
- 5**: Column search field above the table.
- 6**: Row menu for individual family records.

LOCATION	FAMILY	BALANCE	STATUS	ADDRESS	CITY	STATE	ZIP	PRIMARY PHONE	STUDENTS
EDU	Agar	540.00	Active	234 Eldridge Lane	Huntersville	NC	28078	(999) 874-7991	Melody, Whitne
EDU	Ager	0.00	Active	1105 Holly Lane	Cornelius	NC	28031	(999) 999-6545	Dani, Dale, Bart
EDU	Alberts	0.00	Active	4897 Holt Street	Davidson	NC	28036	(999) 815-2465	Taylor, Brandon
EDU	Ashton	0.00	Active	9883 Annabelle Lane	Davidson	NC	28036	(999) 999-8259	Leigh, Linda, Lor
EDU	Bailey-Skidmore	300.00	Active	10098 Poppy Lane	Huntersville	NC	28078	(999) 999-2688	Anne
EDU	Bangor	0.00	Active	1961 Sycamore Road	Huntersville	NC	28078	(999) 999-4387	C.J.
EDU	Barnhardt	595.00	Active	9872 Poplar Lane	Huntersville	NC	28078	(999) 999-5555	Virginia, Sarah, Max

- 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.

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### **Expand/Collapse All**

- ▢ [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 \(Mass Actions\)](#)
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