

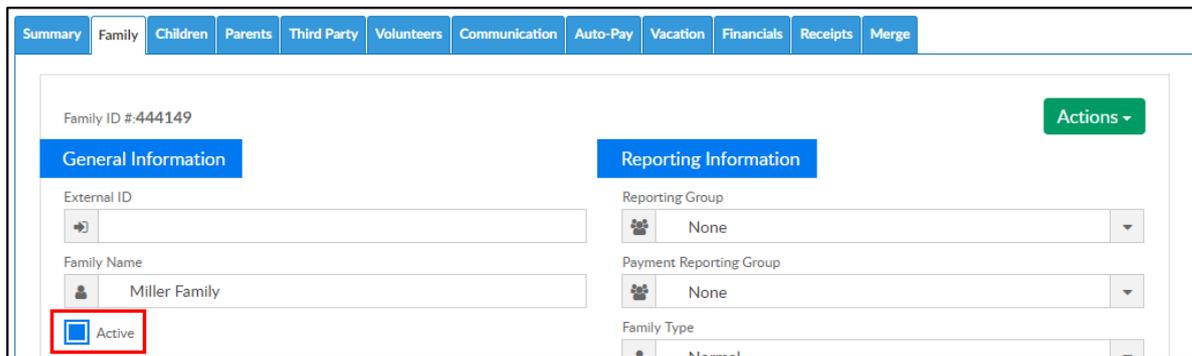
Family Record - Active/Inactive Families

Last Modified on 06/13/2019 9:41 am EDT

When a family is marked Inactive, they will not appear in the search results when using the Search box in the top left.

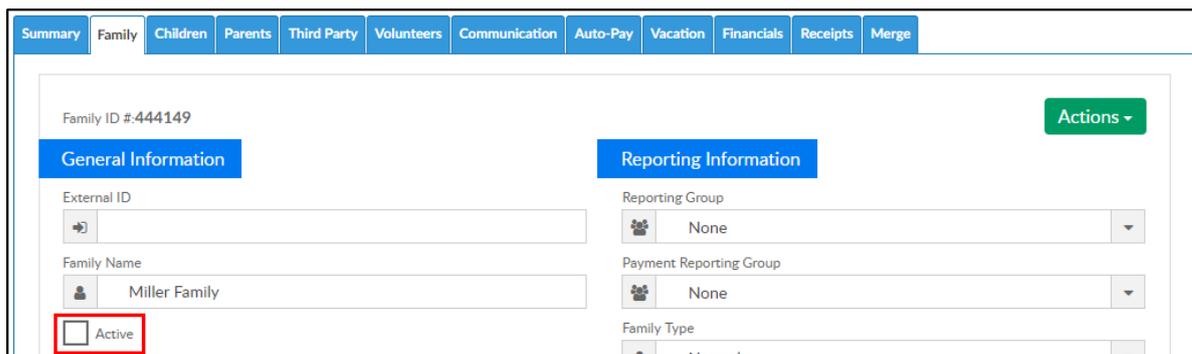
Marking a Family Inactive

1. Navigate to the Family Record
2. Click on the Family tab
3. Locate the Active box



The screenshot shows the 'Family' tab selected in a navigation menu. The main content area displays 'Family ID #:444149' and an 'Actions' dropdown. Below this, there are two sections: 'General Information' and 'Reporting Information'. In the 'General Information' section, the 'Family Name' is 'Miller Family' and the 'Active' checkbox is checked and highlighted with a red box. The 'Reporting Information' section shows 'Reporting Group' and 'Payment Reporting Group' both set to 'None'.

4. Uncheck the Active box to mark the family inactive



This screenshot is identical to the previous one, but the 'Active' checkbox is now unchecked and highlighted with a red box.

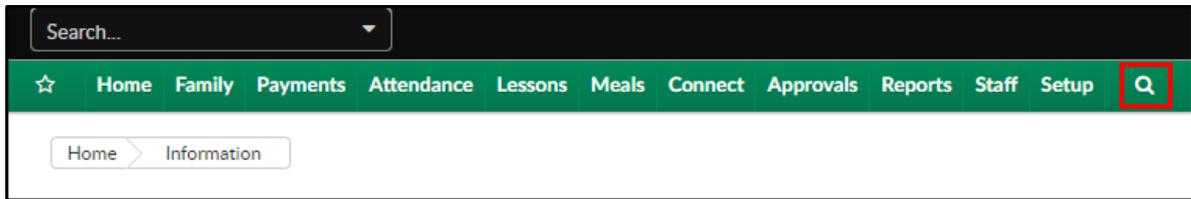
5. Click Save at the bottom. A confirmation message will appear



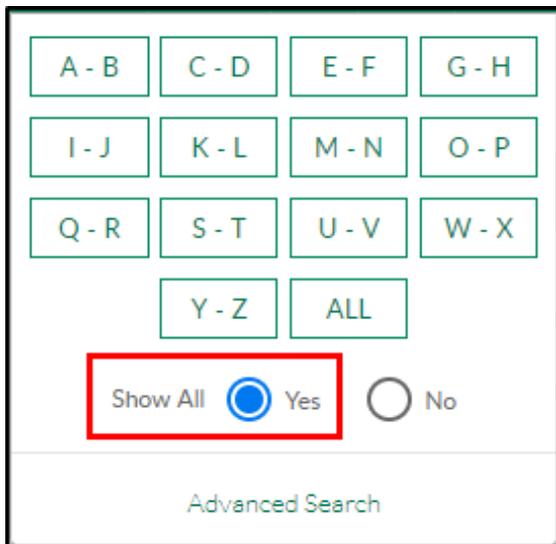
The screenshot shows a green success message box with a checkmark icon. The text reads: 'SUCCESS Family save was successful.'

Locating an Inactive Family

1. Click the Search icon from the menu bar



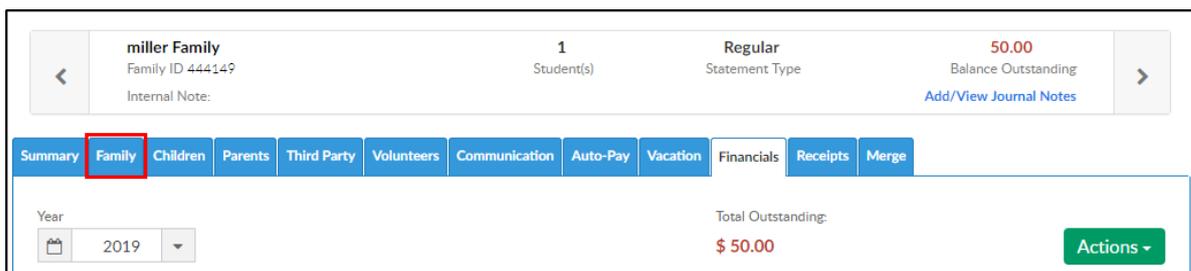
2. Select Yes for Show All. **Please Note:** if No is selected, Inactivate families will not display



3. Choose the letter of the last name or click All to locate the family record
4. The active and inactive families will display. To view the family record or mark the family as Active, click the family name



5. Navigate to the Family tab



6. Locate the Active box

Summary Family Children Parents Third Party Volunteers Communication Auto-Pay Vacation Financials Receipts Merge

Family ID #:444149 Actions ▾

General Information

External ID

Family Name

Active

Reporting Information

Reporting Group

Payment Reporting Group

Family Type

7. Select Active and click Save at the bottom of the screen

Summary Family Children Parents Third Party Volunteers Communication Auto-Pay Vacation Financials Receipts Merge

Family ID #:444149 Actions ▾

General Information

External ID

Family Name

Active

Reporting Information

Reporting Group

Payment Reporting Group

Family Type

8. A confirmation message will appear

Summary Family Children Parents Third Party Volunteers Communication Auto-Pay Vacation Financials Receipts Merge

 **SUCCESS**
Family save was successful.