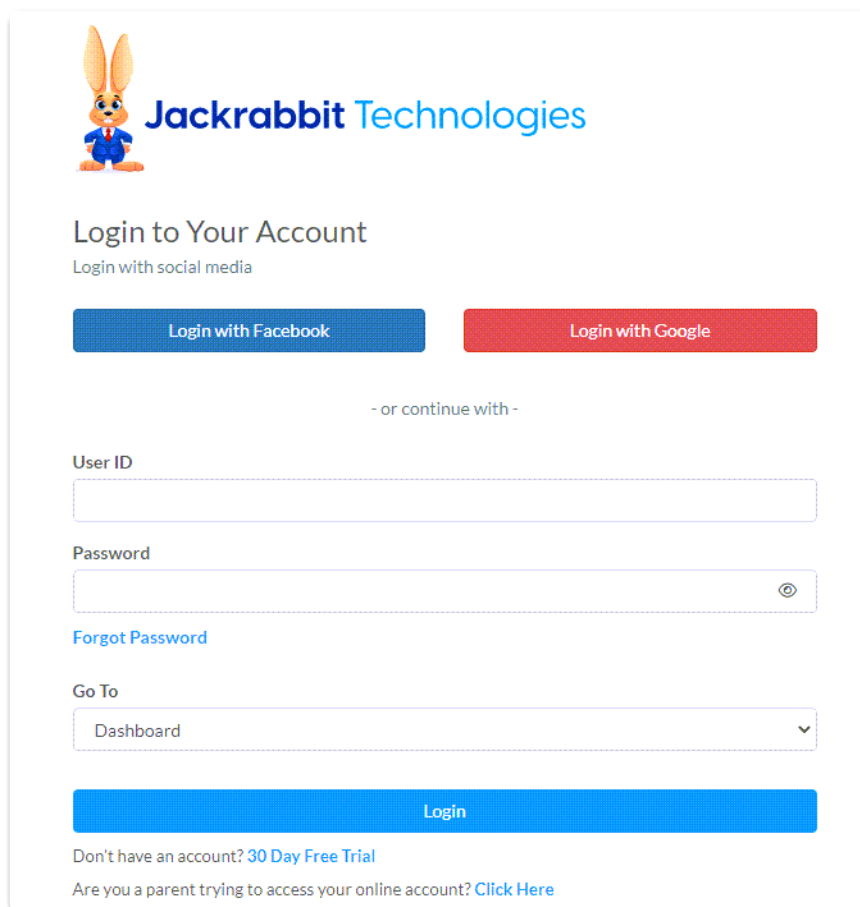


Lesson #1 - The Basics

Log In and Out of Jackrabbit

There are multiple ways to log in to Jackrabbit from any computer or device with internet access.



The screenshot shows the Jackrabbit Technologies login interface. At the top left is a cartoon rabbit logo. To its right is the text "Jackrabbit Technologies". Below this is the heading "Login to Your Account" followed by the subtext "Login with social media". There are two buttons: a blue "Login with Facebook" button and a red "Login with Google" button. Below these buttons is the text "- or continue with -". This is followed by two input fields: "User ID" and "Password". The "Password" field has a toggle icon on the right. Below the "Password" field is a blue link "Forgot Password". Underneath is a "Go To" section with a dropdown menu currently showing "Dashboard". At the bottom of the form is a large blue "Login" button. Below the button are two links: "Don't have an account? 30 Day Free Trial" and "Are you a parent trying to access your online account? Click Here".

Login with Facebook

You have the option to log in with Facebook.

1. Access the login page at <https://www.jackrabbitclass.com>. Bookmark this page for quick access!
2. Click on the **Login** tab in the upper right corner.
3. Click on the blue **Login with Facebook** button.
4. Select the Facebook account to link to Jackrabbit.
 - You will be prompted to select a Facebook account if you have multiple Facebook accounts. Enter your password if you are not already logged into your Facebook account.
5. Enter your Jackrabbit User ID and Password in the *Link Social Account* window.

- This linking step is only required once, and Jackrabbit will remember your credentials.
- Jackrabbit will open the Executive Dashboard or another page you selected from the Go To drop-down list on the login page.

Login with Google

There is an additional option to log in with a Google account.

1. Access the login page at <https://www.jackrabbitclass.com>. Bookmark this page for quick access!
2. Click on the **Login** tab in the upper right corner.
3. Click on the red **Login with Google** button.
4. Select the Google account to link to Jackrabbit.
 - You will be prompted to select a Google account. Enter your password if you are not already logged into your Google account.
5. Enter your Jackrabbit User ID and Password in the *Link Social Account* window.
 - This linking step is only required once, and Jackrabbit will remember your credentials.
 - Jackrabbit will open the Executive Dashboard or another page you selected from the Go To drop-down list on the login page.



Anti-virus software or a firewall may prevent you from logging into Jackrabbit using Facebook or Google. To fix this, open your anti-virus software and select the Web Protection Exception option; add these domains: **connect.facebook.net** and **accounts.google.com/gs/client**. If you are still having issues logging in, please email support@jackrabbittech.com.

Login with Your Jackrabbit Credentials


Logging in requires a Jackrabbit **User ID** and a **Password**. The first User ID in your database, and a temporary password, are created by our Support Team when you request your free trial or order Jackrabbit. This information is sent to you in an email. If you do not have your User ID and the temporary password, please contact our Support Team at support@jackrabbittech.com.

1. Access the login page at <https://www.jackrabbitclass.com>. Bookmark this page for quick access!
2. Click on the **Login** tab in the upper right corner.
3. Enter your Jackrabbit User ID and Password.
 - Jackrabbit will open to the Executive Dashboard or to another page in the application you selected from the Go To drop-down list on the login page.



If another person logs in on the same device and browser using a second tab, the first person will be logged out. Use different browsers if your team requires access to multiple logins on the same device without disrupting anyone, i.e., one uses Google Chrome while another uses Mozilla Firefox.

Log Out

Log out of your Jackrabbit database by clicking  Signout in the upper right corner of your screen located below your User ID. *Note:* If you are logged into Jackrabbit and are not active within a 2-hour window, you will be automatically logged out.

Jackrabbit User ID Passwords

Jackrabbit **User ID** passwords are **case-sensitive** and must contain **at least**:

- 9 characters
 - 1 lowercase
 - 1 uppercase
 - 1 number
-

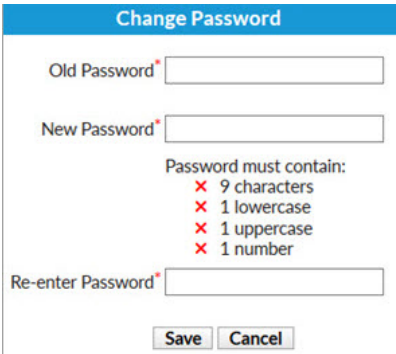
Things happen, passwords may need to be changed or they can be forgotten.

There are several ways a Jackrabbit User ID password can be managed, either by the User themselves or by another Jackrabbit User who has been given the required permissions, *Users & Permissions* (Gear icon > Settings). [Learn more about User Permissions.](#)

Jackrabbit Designated User

When the User is logged into Jackrabbit

- Gear (icon) > Account > Change Password



- Enter a new password that meets the requirements (will be indicated with a green check mark).

From the Jackrabbit Login Page

- *Forgot Password*

The screenshot shows the Jackrabbit Technologies login interface. The main page has a header with the Jackrabbit logo and 'Jackrabbit Technologies'. Below it, the 'Login to Your Account' section includes a 'Login with Facebook' button, a 'or continue with' link, and input fields for 'User ID' (containing 'agingvictor@gmail.com') and 'Password' (masked with dots). A 'Forgot Password' link is highlighted with a yellow box and a hand cursor. Below the login fields is a 'Go To' section with a 'Dashboard' link and a 'Log Out' button. At the bottom, there is a note: 'Don't have an account? 30 Day Free Trial' and 'Are you a parent trying to access your online account?'. A modal titled 'Forgot Password' is open on the right. It features the Jackrabbit logo, the title 'Forgot Password', and instructions: 'Enter your User ID and Email Address on file and click "Reset My Password", so we can send you an email with a password reset link. This link is valid for 2 hours.' The modal contains two input fields: 'User ID' and 'Email Address', both highlighted with yellow boxes. Below these fields is a 'Reset My Password' button. At the bottom of the modal, there is a link: 'Need Help? Contact your system administrator or email the Jackrabbit Support team'.

- The *Email Address on file* is the address that was used when the User ID was created or last modified in Jackrabbit.
If the User ID or email on file is not known, a User with the correct permissions can help or contact support@jackrabbittech.com. To be able to assist, they'll need the User's full name and the name of the organization.
- The reset password link is valid for 2 hours.

Other Jackrabbit User (with correct permissions)

From within Jackrabbit

- Gear (icon) > Settings > Users & Permissions > User IDs (select a User ID from the list)

User: DIHARRIS

[← RETURN](#)[SAVE CHANGES](#)[DELETE](#)[USER DETAILS](#)[USER PERMISSIONS](#)[USER ACCESS-LOCATIONS](#)[USER ACCESS-CATEGORY1](#)[USER ACTIVITY](#)

User Details

[Reset Password](#)[Clone User](#)UserID **DIHARRIS** Org **Jackrabbit Help Center**First Name Last Name

- Use the **Reset Password** button to generate a temporary password
- Notify the User and advise them to log in and change their password to one of their choice.



For the security of your data, the Jackrabbit system will block a User ID's access to your database after three failed login attempts and change the User ID status to **Locked Out**. Only a User with both permissions "Manage Users & Permissions" and "Edit User Permissions" can change the status back to **Normal**. [Learn more about User ID Login Status](#)

The Executive Dashboard - An Overview

The **Executive Dashboard** empowers you with key metrics, data visualizations, alerts, and more. Dive deeper with quick and easy access to related reports.

- ★ Understand your data with visualizations that provide a clear picture of trends and patterns.
- ★ Track performance at a glance with key metrics that update in real-time.
- ★ Stay ahead of the game with alerts that call out items that need your attention.
- ★ Customize your Executive Dashboard layout to focus on what matters most to you.

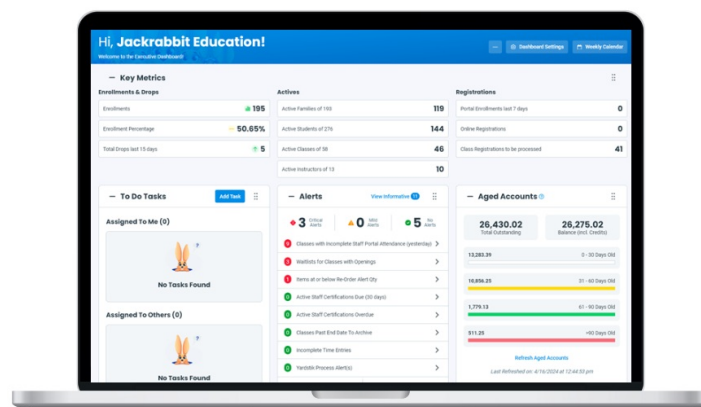


Every widget on the Executive Dashboard is controlled by User Permissions, letting you decide what data your Users' can see and what actions they can take. Each help article for the Executive

Dashboard widgets covers the required permissions.

Use the links below to learn about each of the widgets on the Executive Dashboard.

Key Metrics	At a glance information on enrollment and drops, active records (Family, Student, Class, Instructor), and registrations with quick access to related reports.
To Do Tasks	Assign tasks to yourself and your staff and monitor their progress.
Alerts	View actionable and informative alerts and use quick links to access important information, including upcoming birthdays, waitlists with openings, overdue staff certifications, and more.
Aged Accounts	Aged accounts are broken into time buckets that can be color-coded to alert you to the family accounts that need attention.
Revenue Summary	Bar charts represent your revenue with two options: the current year compared to two previous years or 12-month trailing revenue.
Internal Announcements	Keep your Jackrabbit Users in the loop at a glance.



Navigate in Jackrabbit

Let us take you on a tour of your Jackrabbit system!

⌵ Executive Dashboard

⌵ Menu Bar

⌵ Weekly Calendar

⌵ Quick Search Fields

⌵ Buttons

⌵ Tabs

⌵ Links

⌵ Drop-downs

Expand/Collapse
All

The Four Main Areas Where Jackrabbit Stores Your Data

Jackrabbit organizes and stores information into four main areas:

- The Family Record
 - The Student Record
 - The Class Record
 - The Staff Record
-

The Family Record

The *Family* record includes all the information related to the family. You can see information on parents and other contacts, children or adult students, and the classes in which they enroll – their current, past, and future. The information is organized under tabs: *Summary*, *Contacts*, *Classes*, *Events*, *Transactions*, *Billing Info*, and *Misc*. Above the tabs are several very handy buttons. Buttons are shortcuts to places where you can perform actions. See [The Family Record](#) for a more in-depth look.

As you will see, the *Students*, *Classes*, and *Staff* records are set up similar to the *Family* record; each has tabs to organize information and buttons for shortcuts to actions or reports relating to the record.

The Student Record

From the *Student* record > *Summary* tab, you can see the classes the student is currently enrolled in with detail about each class. The *Classes* tab shows current as well as past and future enrollments. You can track medical information, skills the student has attained, sizing, absences, and other information in the *Student* record. See [The Student Record](#) for more details.

The Class Record

The *Class* record > *Summary* tab is all about how the class is set up. The *Enroll List* tab shows who is enrolled in the class; the *Drop List* tab shows the students who have dropped the class and so on. The *Class* record has many buttons that are shortcuts for actions or reports relating to classes. For a complete overview see [The Class Record](#).

The Staff Record


The *Staff* record holds all the information regarding your staff. You are not required to set up staff to get started with Jackrabbit, however, setting them up and using our Staff Portal can help you run your business more effectively. The [Staff Portal](#) enables staff to record their time, see their schedule and class rolls, as well as record absences and skills attained by students. Check out [The Staff Record](#) for a closer look.

The Family Record

The **Family** record provides a centralized area to keep all information related to a specific family. It's like a file cabinet; it stores and organizes important information.

You can access a Family record from the following locations in Jackrabbit:

- *Families (menu)* > *All Families* and click on a family name to open the record.

- *Families (menu)* > *All Families* > row menu  > *View/Edit* to open the record.
- Use the global search at the top of each page to find a family.

Refer to [Work with All Families - View, Search, and Take Action](#) for more information on the *All Families* grid.

In the Family record, the information is grouped and organized on different **tabs**. **Buttons** allow you to perform an action for the family, for example, post a fee, and many links are provided throughout the record for convenient access to additional relevant information. Other links can be used to do things like enrolling a student.

Family: Agar

Buttons are used to perform actions for the family.

RETURN SAVE CHANGES DELETE

Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email Push Notification Email Schedules Submit Absences Merge Family

Summary Contacts Classes Events Transactions Billing Info Misc Notes (0) Resources (2) Policies (5)

Primary Contacts





View 1 - 2 of 2


Tabs organize the family's information. The **Summary** tab is selected here.

Contacts	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Tara Agar Mother (999) 374-6545	(999) 374-6545	dilinth@gmail.com	Yes	Yes	tagar@email.com	08/15/2023 5:13:00 PM

Students


View 1 - 2 of 2 Print Refresh


First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Dianne	Agar	 Enroll	Y	Female	9/10/2010	12 yrs	8th grade	Little Otters - Beg - M(Kendra B.)(65), Guitar - Maxwell - Wed - 1pm(Maxwell B.)(150)		
Melody	Agar	 Enroll	Y	Female	2/8/2008	15 yrs	4th grade	Karate 1 - Tue - 3rd-5th(Erma B.)(152), Piano 101 - Beg - Th(Maxwell B.)(100)		

Current Balance **112.00** ☐ Problem Account 

Location

Status

Registration Date 

Primary Phone 

Links on the page allow you to perform actions or access additional information.



The *Current Balance* displayed here is pulled from the *Transactions* tab. A **black** balance means a zero balance, a **red** balance indicates an amount is owed to you, and **green** balance indicates a credit. This color code feature is applied on the *Transactions* tab as well.

Family Tab Descriptions

Expand/Collapse All

Family Button Descriptions

Frequently Asked Questions




If the *Birth Date* column is highlighted in yellow, this indicates the student's birthday is coming soon.

The Student Record

The Student record lives within the **Family record** and offers a centralized location to house and reference all information related to a specific student. Each student record has its own **tabs**, **buttons**, links, and **user-defined fields**.

You can access a Student record from the following locations in Jackrabbit:

- ★ *Students* (menu) > *All Students* and select a student's name to open the record.
- ★ *Students* (menu) > *All Students* > row menu  > *View/Edit* to open the record.
- ★ *Families* (menu) > *All Families* > click the student's family name > click the student's name listed in the *Family* record under the *Students* section to open the record.

Refer to **Work with All Students - View, Search, and Take Action** for more information on the *All Students* grid.

Student: Barbie Ager

SAVE CHANGES

DELETE

Buttons allow Users to perform specific actions for a student.

Tabs provide Users with specific information about the student and their family. The Summary tab is selected here.

Enroll | Email Schedules | Info Sheet | Absence/Attendance | Submit Absences | Mass Drop Classes | Statement


Family: Ager: First Name Middle Initial Last Name


Summary | Classes | Events | Medical | Feedback | Skills/Levels | Sizes | Absences | Misc | Notes (0) | Resources (0)


Current Enrollment


View 1 - 2 of 2 | Print | Refresh



Class	Session	Cat1	Type	Class Description	Days	Room	Time	Duration	Instructor	UserID		Future Drop
Tumbling L1 - Mon 6pm	Spring 2022	Gymnastics	Enrolled	Beginner Tumbling	M	Floor A	6:00pm - 6:30pm	:30	Coach Stephanie	Portal	Transfer	Drop
Ballet L1 - Tues 6pm	Spring 2022	Dance	Enrolled	Introductory Ballet	Tu	Studio B	6:00pm - 6:30pm	:30	Ms. Dianne	Portal	Transfer	Drop
Total:								1:00				


Status: Active 

Birth Date:  Age: 10 yrs, 5 mths

Gender: Female 



Grade Level: 

Email:  ☒ Mass Email Opt-Out 



Cell Phone: 


Transportation:

School:

Start Date:  Date Quit: 

Student/Barcode ID:

Student Fixed Fee Amount:  Exp Date:  Note:

Fixed Fee Category1: 

Click links to perform actions or to open new information and screens.

Expand the sections below to see the *Student* record tab and button descriptions.

📁 Student Tab Descriptions

Expand/Collapse
All

📁 Student Button Descriptions

📁 Frequently Asked Questions



A picture of the student can be added in the Misc tab.

The Class Record

The Class record stores vital information about your classes and can be accessed from these locations in Jackrabbit:

- ★ *Classes (menu) > All Classes* > click the class name link in the grid
- ★ *Classes (menu) > All Classes* > click the row menu: > *View/Edit*
- ★ Use the global search at the top of each page to locate a class.

Every Class record has its own tabs, buttons, and links. See [Class Fields Explained](#) for additional information on the various class detail fields.

Class: Ballet - Foundations - Th

Buttons are used to perform actions for the class.

Class Roll	Enroll Student	Email/Text Class	Enter Absences	Absence/Attendance	Post Class Transactions	Copy Class	Mass Drop	Sizes/Measurements	Archive Class				
Summary	Enroll List	Drop List	Absences	Makeups	Wait List	Instructors	Lesson Plan	Skills/Levels	Misc	Costumes	Notes (0)	Resources (0)	Policy Groups (2)

Class Name: Status:

Location: Room:

Session:

Class Start Date: End Date: Registration Start Date:

Days: ☐ Mon ☐ Tue ☐ Wed ☒ Thu ☐ Fri ☐ Sat ☐ Sun

Start Time: End Time: Duration:

☒ Has a Registration Fee

Tabs provide specific information about the class. Currently, the **Summary** tab is displayed.

-
- ⌵ Class Tab Descriptions
 - ⌵ Class Button Descriptions
 - ⌵ Frequently Asked Questions

Expand/Collapse
All

Class Fields Explained

The *Class Summary* tab contains all the details for a class. Expand each section for a brief description of the field on this tab.

- ⌵ Class Name
- ⌵ Status
- ⌵ Location
- ⌵ *Room
- ⌵ *Session
- ⌵ Class Start/End /Registration Start Dates
- ⌵ Days
- ⌵ Start/End Times & Duration
- ⌵ Has a Registration Fee?
- ⌵ Tuition Fee
- ⌵ Per Day
- ⌵ Exclude from requiring payment during Parent Portal enrollment
- ⌵ Tuition Billing Method

Expand/Collapse
All

- ⌵ Exclude from Multi-Class Discount
- ⌵ Exclude from Total Hours Count
- ⌵ Tuition Billing Cycle
- ⌵ Tuition Discount Rule
- ⌵ Prorate Tuition
- ⌵ Gender
- ⌵ Min Age / Max Age
- ⌵ Cutoff Date
- ⌵ *Category 1, 2, and 3
- ⌵ Enrollment Max Size / Max Wait
- ⌵ Class Description
- ⌵ Display on Website
- ⌵ Allow Online Registration
- ⌵ Allow Portal Enrollment
- ⌵ Allow Trial Enrollment
- ⌵ Allow Makeups in Class
- ⌵ Class ID
- ⌵ Virtual Class / Video Link URL
- ⌵ Virtual Class / Video Link Text

***The drop-down lists for the class fields marked with an asterisk above are all customizable. Use the Gear (icon) > Settings > General > Drop-down Lists (left menu) to customize these drop-downs.**

Legal Policies & Policy Groups - An Overview


Every organization has policies, or waivers, families must agree to prior to attending classes or using their facility. We recommend you consult with your insurance carrier or legal counsel to determine if the policies you create cover your business needs and how often the policies need to be updated.

Depending on your organization, and the programs offered, you may need to create specific policies for classes, summer camps, travel leagues, team competitions, etc. in addition to default general policies.

Jackrabbit Policies are easy to set up and give you great flexibility!

- ★ Create an unlimited number of policies and update them as needed.
- ★ Policy Groups are created from individual policies and assigned to classes.
- ★ New customers can agree to your policies when they register using the [Online Registration](#) form.
- ★ Customers can be automatically prompted to reagree to the policies in the [Parent Portal](#).
- ★ The [User Activity Report](#) reflects User actions taken for both policies and policy groups.

These steps will help guide you through the process of creating and managing the legal policies for your organization.

Step 1 - Create a New Policy	<p>The <i>Policy</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i>. On the <i>Policy</i> tab, you create and edit individual policies, add brief descriptions (optional), see if a policy has been assigned to a policy group, and review previous versions.</p> <p>Once individual policies are created, move to <i>Step 2</i> to add Policies to Policy Groups.</p>
Step 2 - Create a Policy Group	<p>The <i>Policy Groups</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i> > <i>Policy Groups</i>. On the <i>Policy Groups</i> (tab), you can create a policy group and use the row menu  to edit and remove groups.</p> <p>Optionally, you can select a basic or default policy group that customers need to agree to when there is <i>no class enrollment</i>.</p> <p>Proceed to <i>Step 3</i> to assign the Policy Groups to classes.</p>

Step 3 -Assign Policy Groups to Classes	<p>Once you have created individual policies and added them to a policy group, it's time to assign the group of policies to a class.</p> <p>Policy groups can be added to an individual class or multiple classes. For multiple classes, go to the <i>Classes</i> menu > <i>All Classes</i>, filter the classes as needed, and add the policy groups. Add a policy group to a single class using the <i>Policies</i> tab in the <i>Class</i> record.</p>
Step 4 -Select Parent Portal Setting	<p>The <i>Parent Portal</i> setting is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Parent Portal</i> > <i>Settings</i> (tab) > <i>Class Enrollment Settings</i> section.</p> <p>Check the box for <i>Require policy agreement for each enrollment</i> if you want parents to agree to your policies for all class enrollments. If not, leave the box unchecked and they will be prompted to agree to any policies related to a new enrollment or policies that have been updated from the last policy agreement date.</p>



We recommend you review and update your legal policies at least once a year! Parents will be prompted to reagree to any updated policies when they sign into the Parent Portal. Contact [Jackrabbit Support](#) if you need any help with your policies.

⌵ [Policies & Policy Groups User Permissions](#)

[Expand/Collapse All](#)

⌵ [Policies in the Family Record](#)

⌵ [Policies and the Lead File](#)

⌵ [Frequently Asked Questions](#)



A set of Default Policies is added to each Jackrabbit database when it is created; these include Assumption of Risk, Release of Liability, Medical Emergencies, and Payment Policy. They are created to help you get started and can be modified under the *Gear* icon > *Settings* > *Policies* > *Policies* tab at any time.

Work with Grids in Jackrabbit

Throughout Jackrabbit, you will see grids, which are sometimes referred to as tables. These grids display the data you have entered into Jackrabbit; they are incredibly robust - allowing you to group, sort, filter for specific information, and more. **Note: the features available in each grid throughout Jackrabbit may vary.**

Sample Grid

Staff Certifications 7 [MANAGE CERTIFICATIONS](#)

[← RETURN](#)

ALL STAFF CERTIFICATIONS 1 Type: REQUIRED Names: 3 Items Names: CPR, First Aid, CPR - Infant/Child

Showing 7 of 16 Staff Certifications [HELP WITH GRIDS](#) 8 [Grid](#) [Filter](#) [Refresh](#) [Add](#) [More](#)

[Export to Excel](#)

2 ↑ NAME 5 TYPE 6 FIRST NAME LAST NAME EMAIL STAFF STATUS CERT STATUS CERTIF

Name: CPR

3	CPR	REQUIRED	Stephanie	Andrews	dilanth@gmail.com	Active	OVERDUE	Nov 1, 2
	CPR	REQUIRED	Dianne	Harris	dilanth@gmail.com	Active	EXPIRED	Aug 15,
	CPR	REQUIRED	Dianne	Harris	dilanth@gmail.com	Active	CURRENT	Dec 4, 2
	CPR	REQUIRED	John	Linton	jilintonjr@outlook.com	Active	OVERDUE	Dec 2, 2

Name: First Aid

4	First Aid	REQUIRED	Stephanie	Andrews	standrews@gmail.com	Active	INCOMPLETE	
----------------	-----------	----------	-----------	---------	---------------------	--------	------------	--

9 1 50 items per page

- 1 Breadcrumbs display the currently selected filters.
- 2 Drag and drop a column header into the grouping bar to group results.
- 3 Click a row menu to open action options for that row.
- 4 Page number displays up to 250 items per page.

- 5 When a column filter is applied, the column menu is highlighted in blue.
- 6 Column menu offers options to sort, display, and filter the data within the column (options in this menu vary depending on the grid).
- 7 Manage Certifications opens the Drop-down List Editor to edit (for the Certifications page only).
- 8 Adjust columns, Send Message, Refresh Grid, Add New icon (action icons available will vary between grids), More (varies by grid).
- 9 Slider shows more columns in the grid.

📁 Group Your Data

Expand/Collapse
All

📁 Sort and Filter Data in the Grid

📁 Take Action

📁 Data Visuals







When you are working with the **All Families**, **All Students**, or **All Classes** grids, you can save all of your grid customizations as a favorite that you can make your default view. Learn how to **Save & Load Your Favorite View**.

Save Your Favorite Filtered Grid Views

Save time and effort each time you open a grid page to view your data! After you have applied filters or clicked on a data visual, set the grid column widths, and you can save the filtered data as a Favorite.

Saved favorites can be set as a default view and shared with other Jackrabbit Users in your organization. There is no limit to the number of filtered grid views you can save.

Save a Favorite	<p>Once filters are selected, it's simple to save your favorite views:</p> <ol style="list-style-type: none"> 1. Filter the grid for the information you are looking for. <ul style="list-style-type: none"> ◦ Use the <i>filter (icon)</i>  or click on a data visual. ◦ Adjust column widths as needed. 2. Click the Save as favorite (icon)  . <ul style="list-style-type: none"> ◦ Enter a favorite name. ◦ Select if you want to set the favorite as the default view. This view will automatically load when you return to the page. ◦ Select if you want to share with your team. 3. Click Save. Your filtered data, column width, and column-locked positions are all saved.
Open a Favorite	<p>Load or open a saved favorite:</p> <ol style="list-style-type: none"> 1. Click the Favorites (icon)  . 2. Select your saved favorite from the drop-down list or start typing in the search field. 3. Choose one of the saved views and click Load. The grid populates the data, and the breadcrumbs indicate the selected filters. <p>If you opened a saved favorite grid view and would like to make it your default view, resave it as a favorite and toggle the <i>Make this your default view?</i> to the right. Click Save.</p>
Delete a Favorite	<p>If you created a Favorite, you will be able to delete it:</p> <ol style="list-style-type: none"> 1. Click the Favorites (icon)  . 2. Select the favorite you would like to delete. 3. Click Delete.



[Contact Jackrabbit Support](#) if you want to delete a Favorite filtered view created by another User.

Notes in Jackrabbit - Family, Student, Class, and Staff

With Jackrabbit's Note feature, you can create and keep detailed and searchable notes regarding your

families, students, classes, and staff.



These notes are not visible in the Parent Portal or the Staff Portal.

The *Family*, *Student*, *Class*, and *Staff* records each include a *Notes* tab where you create and store your related notes, and the Notes grid allows you to work with the information in all of those records simultaneously, from one place!

- ★ Strengthen communication among your staff; alerts highlight new notes to ensure nothing important is missed.
- ★ Search, tag, and filter all of the notes in the various records and work with them as a group.
- ★ Notes are secure and are only viewable within Jackrabbit.

The Notes Tab

The *Notes* tab in the *Family*, *Student*, *Class*, and *Staff* records is where notes are stored. From this tab, notes can be added, edited, or deleted. You can search the notes in that record, filter the notes by **tag**, and sort the notes by the date created or by the date modified.

Family: Ager

Notes (2)

2 Notes + NEW NOTE

Search: Begin typing... Filter by tags... Sort: Date Modified: Newest to Oldest

March 31, 2022 10:06 PM // by helpcenter
Grandma's Credit Card
Holly's Mom came in today and put her credit card on file to be used for all costumes.
Modified April 27, 2022 5:21 PM by helpcenter EDIT DELETE

March 31, 2022 10:04 PM // by helpcenter
Recital Carpool
Holly is able to drive and can take 6 passengers.
Modified March 31, 2022 10:04 PM by helpcenter EDIT DELETE

Tag notes to enable you to filter for a specific type of note

Sort by Date Created or Date Modified

📌 Create a Note in the Family, Student, Class, or Staff Record

Expand/Collapse All

- 📌 Create a Note in the Families (menu) > All Families
- 📌 Create Notes in the Students (menu) > All Students
- 📌 Create Notes in the Classes (menu) > All Classes
- 📌 Edit or Delete a Note
- 📌 The Notes Grid
- 📌 Add Tags to Notes



Jackrabbit offers several ways to take note of important information for your business. For a complete list, refer to [There are Different Types of Notes in Jackrabbit - Where can I view them?](#)

Resources in Jackrabbit - Family, Student, Class, and Staff



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Jackrabbit Resources](#).

With Jackrabbit's **Resources** feature you can upload files and add links to the *Family*, *Student*, *Class*, and *Staff* records where they are stored on the *Resources* tab.

- ★ No more files full of paper...scan documents, then upload and store them in the record they relate to.
- ★ Resources added to a *Class* record can be shared with both parents ([Parent Portal](#)) and staff ([Staff Portal](#)).
- ★ Resources added to a *Student* record can be shared with parents in the Parent Portal.
- ★ Limit access to sensitive documents to only those Users with the required permissions.
- ★ Resources are retained when a family is placed in the Lead file and can be restored at a later date.



Review [Jackrabbit's Terms of Use](#). Uploading a file confirms you have agreed and that you have consent to possess the resource you are uploading.

The Resources Tab

Each *Family*, *Student*, *Class*, and *Staff* record has a **Resources** tab where you can upload files and add links (URLs). For example, in the *Class* record, add a link to a Google Doc with instructions and video links for a virtual class that you have created.

- The Resources tab in each record shows the number of resources that have been added, e.g., Resources (5).
- Each of the records (Family, Student, Class, and Staff) can store up to 15MB of data. Usage is displayed in a progress bar and available space is counted down.
- Sort the resources by date created or modified, or alphabetically by resource title or filename.
- Each resource card displays a date-created timestamp, the User who added the resource, resource name, file name or URL, and the time/date and name of the User that last modified the resource.
- A badge will display to indicate a restricted resource. **RESTRICTED** **Note:** The card for a restricted resource will not display to Users who don't have the *View Restricted Files* User permission.
- In the *Class* record, a resource that has been shared to the Parent Portal and/or Staff Portal will display a badge(s) to indicate it has been published. **STAFF** **PARENTS**
- In a *Student* record, a resource that has been shared to the Parent Portal will display a badge to indicate it has been published. **PARENTS**
- Each resource is **managed** (edited, viewed, or deleted) using the links in each individual resource card.

Class: Ballet - Beg - F

Resources (5)

5 Resources

Usage indicator: TOTAL SPACE: 15MB, 14.6MB left, + NEW

Sort all resources in the record: Date Modified: Newest to Oldest

Resource added timestamp and User: Added March 26, 2020 6:11 PM // by hbarnhardt

Resource name: Virtual Class Info

File name or URL: Virtual Class Info - Ballet-Fridays.docx

Resource modified timestamp and User: Modified March 26, 2020 6:11 PM by hbarnhardt

Badge indicates resource has been shared to the Staff Portal and/or the Parent Portal: STAFF PARENTS

Manage the resource: EDIT VIEW DELETE

📌 Add a Resource in a Family or Staff Record

Expand/Collapse All

📌 Add a Resource in a Student Record

- 📌 [Add a Resource in a Class Record](#)
- 📌 [Add a Resource to a Single Class in the Classes \(menu\) > All Classes](#)
- 📌 [Add a Resource to Multiple Classes in the Classes \(menu\) > All Classes](#)
- 📌 [Add a Class Resource in the Staff Portal](#)
- 📌 [Manage Resources \(Edit, View, Delete\)](#)

QUIZ - Lesson #1 - The Basics

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #1 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent.

Quiz #1 - The Basics

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
10	10	9	8	7

- 📌 [Return to Jackrabbit Basics Menu to continue to next lesson](#)
 - 📌 [Click here to provide feedback for this lesson](#)
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