# Lesson #2 - Searching in Jackrabbit

Search for People or Classes in Jackrabbit

Located above the *Menu Bar*, Jackrabbit offers two fields to help you quickly search and find people and classes. These fields are referred to as the *Global Search Fields* or *Quick Search Fields.*

- The **find a family...** field allows you to search a name, email (when the '@' symbol is included), or phone number.
- The **find a class...** field allows you to search for active classes.

By default these searches are a "starts with" search, however, you can make it a wildcard search using an asterisk. With this, you can search for a name that **contains** the characters you define.
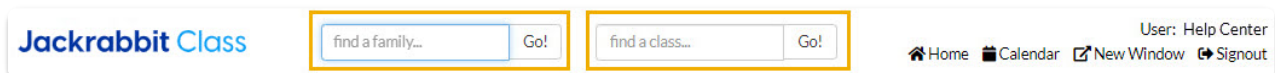
⬜ Example

What does Jackrabbit search?

Jackrabbit will search phone numbers in your system when 10 digits (phone number and area code), 7 digits (no area code), or the last 4 digits of the phone number are entered in the search field.

A non-numeric search term will search:

- Family name
- Student first name
- Student last name
- Student email address
- Contact first name
- Contact last name
- Contact email address

The type of search is always a "starts with" search unless you prefix your search with an asterisk "*". One slight exception is if you enter two search terms separated by a space, Jackrabbit assumes this to be a first and last name and will search on the family name as a "contains" search even without an asterisk.

Advanced Searches

The *Families (menu) > All Families, Students (menu) > All Students, and Classes (menu) > All Classes* offer advanced filtering options that allow you to narrow your search to a specific group.

Refer to these articles to learn more about these searches:

Work with All Families - View, Search, and Take Action
Work with All Students - View, Search, and Take Action
Work with All Classes - View Search, and Take Action
Search Staff

Active vs. Inactive Families

A family is considered*Active* when it has at least one student enrolled in a class that has not been **archived**. The class start date does not affect this. When a student has an enrollment date in the future, even when the class has already started, the family is considered inactive until the future enrollment date occurs and the student actually starts the class.

The family status will remain active until the class is completed and has been archived. This is automatic and cannot be changed.

Family: Ager

← RETURN	🖫 SAVE CHANGES	🗑 DELETE

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

| Summary | Contacts | Classes | Events | Transactions | Billing Info | Misc | Notes (5) | Resources (1) | Policies (4) |

Primary Contacts

View 1 - 2 of 2   🖨 Print   ↻ Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Holly Ager	Mother	(704) 555-2415		(704) 555-2415	hollyager41@gmail.com	Yes	Yes	hollyager41@gmail.com	4/8/2022 1:53:00 PM
Victor Ager	Father	(704) 555-2415		(704) 374-2415	agingvictor@gmail.com	No	Yes	agingvictor@gmail.com	2/1/2023 2:46:00 PM

Students

View 1 - 3 of 3   🖨 Print   ↻ Refresh

First Name	Last Name			Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Barbie	Ager		Enroll	Y	Female	11/17/2011	11 yrs, 2 mths			Cheer Ready - Fri 6pm(Stephanie A.)(75), Tumbling L1 - Mon 6pm(Livy W.)(70), Ballet L1 - Tues 6pm(Dianne H.)(70)	0	
Dani	Ager	✚	Enroll	Y	Non-Binary	7/11/2008	14 yrs, 7 mths			Tumbling L2 - Mon 5pm(Livy W.)(85), Hip Hop L1 - Wed 7pm(Dianne H.)(75)	0	
Dave	Ager		Enroll	Y	Male	7/11/2008	14 yrs, 7 mths			Tumbling L2 - Mon 5pm(Livy W.)(85)	0	

Current Balance 606.00   ☐ Problem Account [?]

Location [CCD ▾]
Status [Active ▾]
Registration Date [11/5/2016] 📅
Primary Phone [(704) 555-2415] 🌐

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.

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)

Work with All Students - 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 Students**.

All Students, located in the *Students* menu, generates a list of all active and inactive student records in Jackrabbit. From here you can use the powerful grid to access all your student data.

- ⭐ Optional **data visuals** offer key student information at a glance with interactive charts.
- ⭐ Drill down to specific students **using filters** organized in a slide-out filter drawer.
- ⭐ Save your **favorite view** (filters, selected columns, etc.) as your default view.
- ⭐ List of students displays in a **powerful grid**: you can group, sort, and customize the information.
- ⭐ Take action - send a message, work with an **individual student,** or apply a **mass action to multiple students** at once.

Sample All Students Grid

All Students

① Breadcrumbs display the currently selected filters.

② Data Visuals provide student 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, and More (click for actions that can be taken with one or more students).

⑤ Column Search - enter a search term in the search field. The column will be searched for results containing that term.

⑥ Row Menu - use the row menu to perform an action for an individual student.

Click the Adjust columns ⊞ icon to squeeze the grid columns closer together.You will be able to see all the columns in the grid.

***

Expand/Collapse All

▯ Data Visuals - Key Information at a Glance

▯ Use Filters to Search for Specific Students

▯ Save your Favorite Filtered Grid Views

▯ Work with the Information in the Grid (Table)

▯ Take Action for an Individual Student

Take Action for Multiple Students (Mass Actions)

Student information in the *All Students* grid lives in the **Student record**. Click a *Student* link in the grid to open the student's individual record.

Work with All Classes - View Search, and Take Action

Permissions control your Users' ability to see certain data and take specific actions. Before proceeding, review **User Permissions for All Classes**.

All Classes, located under the Classes menu, generates a list of all active and inactive classes in the All Classes grid. From here, you can access all your class data.

- ⭐ View optional **data visuals** for key information at a glance with interactive charts.
- ⭐ Drill down to specific classes using filters organized in a slide-out **filter drawer**.
- ⭐ View classes in a **filtered calendar** (daily, weekly, or room view) and enroll students.
- ⭐ Save your **favorite view** (filters, selected columns, etc.) as your default view.
- ⭐ Display a list of classes in a powerful **grid**: you can group, sort, and customize the information.
- ⭐ **Take Action** - add/copy classes, enroll students in classes, send messages, archive classes, and apply **mass actions** to multiple classes.

Sample All Classes Grid

1 Breadcrumbs display the currently selected filters (from the Open Filters icon).

2 Interactive Data Visuals provide class information at a glance.

3 Icons: Open filters (filter drawer), Save as favorite, Favorites, Hide/Show Data Visuals.

4 Horizontal Scroll Bar - scroll to view more Data Visuals.

5 Icons: Adjust columns, Send a Message, Filtered Calendar, Refresh Grid, Add New Class, More actions (drops down a menu).

6 Column Search - enter a term in the search field for each column to locate specific records. For e.g., enter 2023 in the Session Column Search field to find all classes with that Session value.

7 Use the Time Selectors to search for classes that start or end during a specified time. For e.g., search for classes that start between 3:00 pm - 5:00 pm or classes that end after a specific time (enter a From date and leave the To field blank).

8 Row Menu - use the row menu to perform an action for a single class.

Click the Adjust columns ⊞ icon (*see #5 above*) to squeeze the grid columns closer together. You will be able to see all the columns in the grid.

Expand/Collapse All

▯ Data Visuals - Key Information at a Glance

▯ Use Filters to Search for Specific Classes

Save your Favorite Filtered Grid Views

 View the Classic Class Calendar and Enroll Students

 Work with the Information in the Grid (Table)

 Take Action for a Single Class

 Take Action for Multiple Classes (Mass Actions)

 Frequently Asked Questions

The Send Message icon ⊲ can be used to send **emails**, **text messages**, and **push notifications** (through the Jackrabbit Plus mobile app) to a single class or to multiple classes.

Search for Staff Members

The **Search** option, under the Staff menu, is a customizable report of your staff members. It allows you to search through all of your staff and find only those who meet your criteria.

- ⭐ Create a list of employees who have been with you for 5+ years for service awards.
- ⭐ Find all staff with a specific certification.
- ⭐ Generate a list of your staff with birthdays in the coming month and email them a birthday greeting.

Expand/Collapse All

 Select Search Criteria

 Define Instructors' Classes

 Choose Display Settings

 Work with Report Results

Search Transactions

Search Transactions, located under the **Transactions** menu, is a powerful tool to help you locate fees, payments, credits, and refund transactions.

- ⭐ Choose from more than 20 filters (Search Criteria) to drill down to the transactions you are looking for.
- ⭐ Edit multiple transactions at once from the search results.
- ⭐ Email families or export to Excel directly from the search results.
- ⭐ Quickly locate ePayment transactions, including declined payments with **Declined Reason Codes**.
- ⭐ Search within columns in the results.

Processing multiple ePayments at once is a time saver! You can even take it one step further and **schedule ePayments to process later**! Whether you are processing multiple ePayments now or scheduling them to be processed later, reviewing those transactions is an important step.

Permissions control the ability of your Users to see certain data and take specific actions. Search Transactions requires the *Transaction Search* permission in the *Reports* category. Learn more about **Permissions for Jackrabbit Users**.

Search Criteria

There are many filters available in Search Transactions. By default, the search will include all non-deleted transactions for the current date or date range selected. Along with the filters you can use to search transactions, Search Criteria options allow you to search specifically for transactions for a specific family, student, or class.

For this example, the **Transactions Date from/through** was set for 15 days. Leave all the other Search Criteria selections blank. Click **Submit**. The grid will display all the transactions recorded for the time period selected.

Search Results

The search results grid displays all the transactions for the timeframe. In this grid, there are 367 transactions.

- Click the **Edit Transactions** icon ✏️ (pencil in the upper right) to open the **Edit Transactions** page and make updates as needed.
- To edit a single transaction, use the row menu icon ⋮ > **Edit** to open the **Edit Transaction** window.

Search Transactions

← RETURN

ALL RECORDS

Showing 367 of 367 Transactions ⓘ HELP WITH GRIDS

Legend: ☐ Fee/Charge ☐ Payment/Credit ☐ Unpaid Fee ☐ Unapplied Credit

Drag a column header and drop it here to group by that column

☐		DATE	TYPE	AMT	FAMILY/ACCT	NOTE	PMT METHOD	EPMT	STUDENT	CLASS/EVENT	JACKRABBIT FAMILY ID
☐	⋮	Sep 1, 2023	Payment	0.00	Prowl	RC=3,Reason=(300) Duplicate transaction REFID:3157053862	Discover	❗			23603398
☐	⋮	Sep 1, 2023	Tuition Fee	75.00	Prowl	September			Danielle Prowl	Fairytale Art - T - 6:00	23603398
☐	⋮		Edit Delete Link Details Refund	-75.00	Quincey		Visa	✅			23603451
☐	⋮		Fee	75.00	Quincey	September	Visa		Lee Quincey	Fairytale Art - T - 6:00	23603451
☐	⋮			-75.00	Skinner		Amex	✅			23603412
☐	⋮	Sep 1, 2023	Tuition Fee	75.00	Skinner	September	Amex		Olivia Skinner	Fairytale Art - T - 6:00	23603412
☐	⋮	Sep 1, 2023	Payment	-145.00	Clayton		Visa	✅			12936239
☐	⋮	Sep 1, 2023	Tuition Fee	145.00	Clayton		Visa		Taylor Clayton	Tumbling 101 - T/Th - 5:00	12936239
☐	⋮	Sep 1, 2023	Payment	-145.00	English		MC	✅			21805437

Click an ePayment icon to view the details.

Click a Family name to open the Family record.

Print
Export to Excel

When you click one of the icons ✅ ❗ ↩ in ePayment (EPMT) column, a movable window opens with the ePayment transaction information. Place your cursor near the top of the window and click to move the window around the page.

The report results can be further customized to show or hide columns of information, sort and filter columns, or modify column width. You can send an email or print directly from the report results.

Save time and effort each time you open a grid page to view your data! After you have edited column settings and set the grid column widths, you can save the filtered data as a **Favorite**. A saved Favorite can be set as a default view and shared with other Jackrabbit Users in your organization.

Use the action icons in the upper right to work with the information in the grid.

- **Adjust Columns** - click **Adjust columns > Squeeze grid** ⊞ to view the entire grid on the page.
- **Send Message** - leave the 1st column unchecked and click on the **Send Message** icon ⌖ to send an email to all the contacts/families in the report. You can also use the 1st column to select a single family or group of families to send a message to. If you have **texting** enabled, you'll have the option to send a text; if you have **Jackrabbit Plus**, you'll be able to send push notifications.
- **Refresh the data** - click the **Refresh Grid** (icon) ↻ to update results in the grid if you make updates.
- **Print** or **Export to Excel** - click the **More** (icon) ⋮ to print or export the data to Excel.

Note: Depending on the width of the report, reduce the size/scale of the report so all the columns print.

For additional information on working with this type of report, refer to **Work with Reports - Grid Style**.

QUIZ - Lesson #2 - Searching in Jackrabbit

When you have worked through all of the articles outlined in the lesson above, select the Take the Quiz button to be taken to the Lesson #2 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. The quiz includes a Review question.

Quiz #2 - Searching in Jackrabbit

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
8	8	7	6	5

 Return to Jackrabbit Basics Menu to continue to next lesson

 Click here to provide feedback for this lesson