

# Lesson #2 - Searching in Jackrabbit

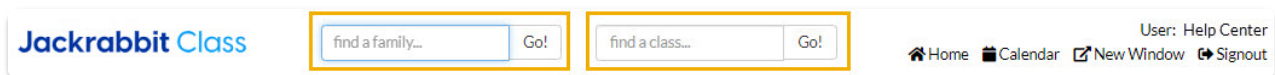
---

## 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 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 database 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

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

Students

First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
<a href="#">Barbie</a>	Ager	<span style="color: green;">Enroll</span> Y	Female	11/17/2011	11 yrs, 2 mths			Cheer Ready - Fri 6pm(Stephanie A.)(75); Tumbling L1 - Mon 6pm(Livvy W.)(70), Ballet L1 - Tues 6pm(Dianne H.)(70)	<a href="#">0</a>	
<a href="#">Dani</a>	Ager	<span style="color: red;">+</span> <span style="color: green;">Enroll</span> Y	Non-Binary	7/11/2008	14 yrs, 7 mths			Tumbling L2 - Mon 5pm(Livvy W.)(85), Hip Hop L1 - Wed 7pm(Dianne H.)(75)	<a href="#">0</a>	
<a href="#">Dave</a>	Ager	<span style="color: green;">Enroll</span> Y	Male	7/11/2008	14 yrs, 7 mths			Tumbling L2 - Mon 5pm(Livvy W.)(85)	<a href="#">0</a>	

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

The screenshot shows the 'All Families' dashboard. At the top, there are breadcrumbs (1) showing 'Family status: Active' and 'Location: EDU'. Below this is a row of data visualizations (2) including donut charts for 'Families by location', 'Families by status', 'Families w/ unpaid fees', 'Top 5 Balances', 'Families by policy status', and 'Families by ePayment status'. A filter drawer (3) is open on the right. Below the visualizations, it says 'Showing 55 of 184 Families'. A table (6) lists family details with columns for LOCATION, FAMILY, BALANCE, STATUS, ADDRESS, CITY, STATE, ZIP, PRIMARY PHONE, and STUDENTS. A row menu (6) is open for the first row, showing options like 'ePayment Schedule', 'Family Discount', 'Family Fixed Fee', 'Membership Type', 'Clear UDF Answers', 'Print', and 'Export to Excel'. A search field (5) is visible in the table header.

	LOCATION	FAMILY	BALANCE	STATUS	ADDRESS	CITY	STATE	ZIP	PRIMARY PHONE	STUDENTS
<input type="checkbox"/>	EDU	Agar	540.00	Active	234 Eldridge Lane	Huntersville	NC	28078	(999) 874-7991	Melody, Whitne
<input type="checkbox"/>	EDU	Ager	0.00	Active	1105 Holly Lane	Cornellius	NC	28031	(999) 999-6545	Dani, Dave, Bart
<input type="checkbox"/>	EDU	Alberts	0.00	Active	4897 Holt Street	Davidson	NC	28036	(999) 815-2485	Taylor, Brandon
<input type="checkbox"/>	EDU	Ashton	0.00	Active	9883 Annabelle Lane	Davidson	NC	28036	(999) 999-8259	Leigh, Linda, Lor
<input type="checkbox"/>	EDU	Bailey-Skidmore	300.00	Active	10098 Poppy Lane	Huntersville	NC	28078	(999) 999-2688	Anne
<input type="checkbox"/>	EDU	Bangor	0.00	Active	1961 Sycamore Road	Huntersville	NC	28078	(999) 999-4387	C.J.
<input type="checkbox"/>	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.

---

- ☑ 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

## 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

---

The screenshot shows the 'All Students' dashboard. At the top left, a breadcrumb trail (1) shows 'ALL STUDENTS' > 'Student status: Active' > 'Category 1: Ballet'. Below this are data visualizations (2) for Absences (0/37), Drops (1/37), and Makeups Owed (7/37). A filter drawer (3) is open on the right. The main grid (4) has columns for Location, Student Name, Family, Age (5), Current Classes, Total Weekly Hours, and #Enrolls. A row menu (6) is open for the first student, showing options like 'View / Edit', 'Enroll', and 'Add a note'. A 'More' menu (4) is also open, showing options like 'Student fixed fees' and 'Export to Excel'.

- 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.

- 👇 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

Expand/Collapse All

## ☑ 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 the ability of your Users to see certain data and take specific actions. Before moving forward 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

---

## All Classes

ALL CLASSES > Class Status: Active > Session: 2023

3

STATUS: Classes by status (Donut chart)

SESSIONS: With active enrollments (Donut chart)

CATEGORY 1: With active enrollments (Donut chart)

ABSENCES (LAST 14 DAYS): 0/55 # of absences Top 5

DROPS (LAST 21 DAYS): 0/55 # of drops Top 5

CLASSES WITH OPENINGS: 45/55 Classes with openings

Showing 55 of 62 Classes

4

5

6


7

8

CLASS	STATUS	SESSION	START DATE	END DATE	DAYS	START TIME	END TIME	INSTRUCTORS	CAT 1			
	Active	2023	Jan 1, 2023	Dec 31, 2023	Mon, Wed, Fri	04:00 PM	05:00 PM	Hannah S., Dianne H.	Ballet			
	Active	2023	Jan 1, 2023	Dec 31, 2023	Mon, Wed	11:15 AM	12:15 PM	Dianne H.	Ballet			
	Active	2023	Jan 1, 2023	Dec 31, 2023	Thu	05:00 PM	06:00 PM	Hannah S.	Ballet			
	Active	2023	Jan 1, 2023	Dec 31, 2023	Wed, Fri	04:30 PM	05:30 PM	Heather B.	Swim			
	Active	2023	Jan 1, 2023	Dec 31, 2023	Thu	08:30 PM	09:30 PM	Lisa O.	Ballet			
	Active	2023		Dec 31, 2023	Wed	04:00 PM	05:00 PM	Hannah S.	Ballet	6	0	0
	Active	2023	Jan 1, 2023	Dec 31, 2023	Fri	07:00 PM	08:00 PM	Heather B.	Cheer	5	0	0
	Active	2023	Jan 1, 2023	Dec 31, 2023	Fri	07:00 PM	08:00 PM	Dianne H.	Cheer	7	0	0
	Active	2023	Jan 1, 2023	Dec 31, 2023	Thu	03:30 PM	04:30 PM	Hannah S.	Cheer	10	0	0
	Active	2023	Jan 1, 2023	Dec 31, 2023	Mon	05:00 PM	06:00 PM	Hannah S.	Cheer	5	0	0


- 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.

- ☑ Use Filters to Search for Specific Classes
- ☑ Save your Favorite Filtered Grid Views
- ☑ View 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.

## The Search Staff Report

The **Search** function, in the *Staff* menu, is a customizable report of your staff members. It allows you to search through all of your staff to find only those that meet the criteria you select.

- ★ Create a list of employees who have been with you for 5+ years for service awards (*Start Date* criteria).
- ★ Ensure your staff's certifications are up to date (optional to use *Staff Certifications* criteria, *Show Staff Certifications* setting).
- ★ Generate a list of your staff with birthdays in the coming month and email them a birthday greeting (*Birth Month* criteria, *Email* button in report results).

---

## Search Criteria

All of the search criteria in Search Staff pull information from fields in the **Staff record**.



## Search Staff

← RETURN

Search Criteria Favorites Save Favorites Refresh ?

First Name  Last Name

Status

Birth Month

Department Default

Instructor

Staff Type  Position

Staff Availability Note/Label

Review Date From  Through

Start Date From:  Through:

Staff Skills

Staff Certifications

Save your criteria and selections as a Favorite for consistent reporting.

Leaving a selection field blank will include all.



The more criteria you select, the fewer staff will be included in the report because a staff member must meet all the criteria.

## Instructors Assigned to Classes

The selections made in this section apply only to staff members who are instructors that are assigned to classes. These selections will pull from fields located in the [Class record](#).

Instructors Assigned to Classes

Class Location  (Select one or more by holding the CTRL key)

Assigned to Class Session  Room

Assigned to Class Category 1

Category 2

Category 3

Class Meets: Mon Tue Wed Thu Fri Sat Sun

## Display Settings

Use these settings to optionally add a column(s) to the report results to display Staff Skill and/or Staff Certifications.

**Display Settings**

Show Staff Skill:

Show Staff Certifications:

## Report Results

**Search Staff**

← RETURN    ↗ EMAIL

View 1 - 1 of 1    Print    Export    Refresh    Show/Hide Columns    Expand

First Name	Last Name	Status	Positions	Classes	Home Phone	Work Phone	Cell Phone	Instruct	Type	Email	Address1	City, ST	Zip	Birth Date	Email All		
Search	Search	Search	Search					Search	Search	Search	Search	Search	Search	Search	<input type="checkbox"/>		
Dianne	Harris	Active	Instructor	<a href="#">Classes</a>				<a href="#">Weekly Schedule Calendar</a>	h: w: c: (704) 374-2415	Yes	Full-Time	dlinth@email.com	7516 Holly Road	Huntersville, NC	28078	7/11/1971	<input type="checkbox"/>

Use this link to create a work calendar of the instructor's classes.

- The **Show/Hide Columns** button allows you to customize your report by selecting which information to display.

**Show/Hide Columns - Search Staff** ✕

Uncheck columns and click the "Apply" button to hide columns. Click the "Apply & Save" button to save these settings for your User ID.

Check All    Uncheck All

<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Address1
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> City, ST
<input type="checkbox"/> Status	<input checked="" type="checkbox"/> Zip
<input type="checkbox"/> Positions	<input checked="" type="checkbox"/> Birth Date
<input checked="" type="checkbox"/> Classes	<input type="checkbox"/> Skills
<input type="checkbox"/> Home Phone	<input checked="" type="checkbox"/> Certifications
<input type="checkbox"/> Work Phone	
<input type="checkbox"/> Cell Phone	
<input type="checkbox"/> Instructor	<input checked="" type="checkbox"/> Email All
<input type="checkbox"/> Type	
<input checked="" type="checkbox"/> Email	

Apply    Apply & Save    Cancel

- Select **Apply** to have these selections applied to only the report you are currently viewing.
  - Select **Apply & Save** to have these selections applied and saved for your User ID. When logged in as your User ID, you will see only the columns of information you chose previously. Other Users will see the columns they selected and saved, which may differ from yours.
  - Use **Restore Columns** to view all available columns.
  - **Email** directly from the report results. Use the *Email All* column to send to only selected staff or send to all.
  - The **Weekly Schedule** link will open the **Weekly Calendar** filtered for that instructor.
  - Use the **Calendar** link to go to open the **Monthly Calendar** filtered for that instructor.
- Note:** If the staff member is not an instructor and you have set their *Instructor* setting (on the *Summary* tab of the *Staff* record) to **No**, they will not appear on the calendars.

# Search Transactions Report

**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

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







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](#)