Lesson #1 - The Basics

Log In and Out of Jackrabbit

Jackrabbit is accessible from any computer or device with internet connectivity through multiple access options.

Our Support Team generates your initial **User ID** and temporary **Password**, which you will receive via email. You will use these credentials to log in to Jackrabbit. If you do not have your User ID and temporary password, contact our Support Team at **support@jackrabbittech.com**.

There are multiple login methods available on the main login page which is accessed from **https://www.jackrabbitclass.com**. Bookmark this page for quick access!

- ⭐ Jackrabbit User ID & Password
- ⭐ Facebook
- ⭐ Google

Expand/Collapse All

◻ Login with Jackrabbit Credentials

◻ Login with Facebook

◻ Login with Google

◻ Log Out

Anti-virus software or a firewall might block you from logging into Jackrabbit using Facebook or Google. To resolve this, open your anti-virus software and find the Web Protection Exception option. Add the following domains: connect.facebook.net and accounts.google.com/gs/client. If you continue to experience login issues, please reach out to **support@jackrabbittech.com**.

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, and passwords are forgotten or need to be updated periodically.

A Jackrabbit **User ID** password can be managed by the account User or another Jackrabbit User who has been given the required **User Permissions**.

Change Your Own Password Option 1	**Change Password** Old Password* [ ] New Password* [ ] Password must contain: ✕ 9 characters ✕ 1 lowercase ✕ 1 uppercase ✕ 1 number Re-enter Password* [ ] Save Cancel • Select the **Gear** icon > **Account** > **Change Password**. • Enter the **Old Password** and select a **New Password** that meets the requirements. Complete the **Re-enter Password** field and select **Save**.

Change Your Own Password Option 2

- Navigate to the Jackrabbit login page at **https://app.jackrabbitclass.com/jr4.0/Login** and select the **Forgot Password** link.

- Enter the **User ID** and **Email Address** related to the User ID.

  - Use the email address provided when the User ID was created or last modified in Jackrabbit.

- Select **Reset My Password**, and the reset password link will be valid for 2 hours.

- If the User ID or email address on file is unknown, another Jackrabbit User with the required permissions can help or contact **support@jackrabbittech.com**. The Support Team will need the User's full name and the organization's name to assist.

Change Another User's Password	**User: LBARNHARDT** ← RETURN 🖫 SAVE CHANGES 🗑 DELETE **USER DETAILS** USER PERMISSIONS USER ACCESS-LOCATIONS USER ACCESS-CATEGORY1 USER ACTIVITY **User Details** Reset Password Clone User Permissions Revoke User ID UserID **LBARNHARDT** Org **Ed's Recreational Center** First Name* Lisa Last Name* Barnhardt • Select the **Gear** icon > **Settings** > **Users & Permissions** > **User IDs** (left menu) and select a **User ID**. • Select the **Reset Password** button to create 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, Jackrabbit will block a User ID's access to your system after three failed login attempts and change the User ID status to locked out. Only a User with both the *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.

⭐ Drag and drop widgets to rearrange your layout.

⭐ Collapse or expand widgets so you can 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 widget 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!

Expand/Collapse All

 Executive Dashboard

 Menu Bar

 Activity Calendar or Classic Weekly Class Calendar

 Quick Search Fields

 Buttons

 Tabs

- Links

- Drop-downs

The Four Main Areas Jackrabbit Stores Data

Jackrabbit organizes and stores your data in**Four Main Areas**: Family records, Student records, Class records, and Staff records. Each record has tabs to organize information and buttons and links for shortcuts to actions or reports relating to the record.

Family Record	The Family record contains all the details related to a family. View information on parents and other contacts, children or adult students and the classes they're enrolled in, billing information, and more. ▶ **Learn more about The Family Record**
Student Record	In the Student record, you can see the classes the student is currently enrolled in, with details about each class. The Classes tab shows current, past, and future enrollments. You can also store medical information, track skills the student has attained, view attendance records, and more. ▶ **Learn more about The Student Record**

Class Record	The Summary tab of the Class record describes 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 additional tabs store even more class information. The Class record has many buttons and links to easily access information and actions, including emailing students or transferring them between classes. ▶ **Learn more about The Class Record**
Staff Record	The Staff record organizes information about a staff person into tabs, including details about pay rates, availability, certifications, and more. Take action using buttons, such as adding a time entry, and use links to access Class records for the classes they teach. ▶ **Learn more about The Staff Record**

The Family Record

The Family record provides a central location for storing and accessing all family information. Each Family record includes tabs to organize information, action buttons for specific tasks, links to related records or actions, and **User-defined fields** for customization.

The quickest way to access a family's record is by using the **Global Search** field above the main menu. Enter a name, email address, or phone number to locate the Family record. You can also easily navigate to a family's record from the **All Families** or **All Students** pages.

Family: Ager

[← RETURN] [💾 SAVE CHANGES] [🗑 DELETE]

Buttons are used to perform actions related to the family.

| 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 | Appointments | Transactions | Billing Info | Misc | Notes (0) | Resources (0) | Policies (1) |

The family's information is organized on various tabs. The Summary tab is selected here.

Primary Contacts

View 1 - 1 of 1   [🖶 Print] [⟳ Refresh]

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Holly Ager	Mother	(704) 555-1200		(704) 555-1200	hollyager41@gmail.com	Yes	Yes	hollyager41@gmail.com	10/1/2024 3:24:00 PM

Students

View 1 - 4 of 4   [🖶 Print] [⟳ Refresh]

First Name	Last Name		Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	Wait
Barbie	Ager	Enroll	Y	Female	11/17/2010	13 yrs			Ballet - T - 6pm(Livy W.)(75), Acro - T - 5pm(John L.)(75)	
Danielle	Ager	Enroll	Y	Non-Binary	4/29/2008	16 yrs		200.00	Ballet Jr Comp - T - 7pm(Dianne H.)(115), HipHop Jr Comp - W - 7pm(John L.)(115)	
David	Ager	Enroll	Y	Male	5/15/2007	17 yrs			Tumbling Int - Th - 7pm(Livy W.)(85), Ballet Jr Comp - T - 7pm(Dianne H.)(115), Jazz Jr Comp - T - 4pm(Dianne H.)(115), Acro - T - 5pm(John L.)(75)	
Lisa	Ager	Enroll	Y	Female	1/30/2014	10 yrs		100.00	Cheer Basics - M/W/F - 7pm(Livy W.)(75), Acro - T - 5pm(John L.)(75)	

Current Balance 4302.62   ☐ Problem Account ⦵

Location [Main ▾]

The Family record contains multiple links for accessing related records or performing specific actions for the family and its students.

Status [Active ▾]
Registration Date [12/14/2022] 📅
Primary Phone [(704) 555-1200] 🌐 ⦵
Address 1 [2016 Hummingbird Crescent]
Address 2 [ ]
City [Huntersville]   State [NC]   Zip [28078]
Neighborhood [ ]
Account# [ ]
Family ID [21729166]

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

Expand/Collapse All

 Family Tab Descriptions

 Family Button Descriptions

 Frequently Asked Questions

The Student Record

C

The Student record is located within the **Family record**, providing a central location for storing and accessing all student information. Each Student record includes tabs to organize information, action buttons for specific tasks, links to related records or actions, and **User-defined fields** for customization.

The quickest way to access a student's record is by using the **Global Search** field above the main menu. Enter a name, email address, or phone number to locate the Family record, where you'll find links to each student in the family. You can also easily navigate to a student's record from the **All Students** or **All Families** pages.

Expand/Collapse All

 Student Tab Descriptions

 Student Button Descriptions

Frequently Asked Questions

The Class Record

The Class record provides a central location for storing and accessing all class information. Each Class record includes tabs to organize information, action buttons for specific tasks, and links to related records or actions.

The quickest way to access a Class record is by using the **Global Search** field above the main menu. In the *find a class...* field, enter a class name or use a * wildcard search to locate the record. You can also easily navigate to a Class record from the **All Classes** page (Classes menu).

| Expand/Collapse All |

 Class Tab Descriptions

 Class Button Descriptions

 Frequently Asked Questions

Class Summary Tab - The Fields Explained

The Class Summary tab includes all class details. Expand each section for a brief description of the fields.

The field options on the Class Summary tab will vary based on the Tuition & Discounting Settings

(Gear icon > Settings > Tuition & Discounting).

Note: The drop-down lists for the Class fields marked with an asterisk * below are customizable. To customize them, select the **Gear** icon > **Settings** > **General** > **Drop-Down Lists** on the left menu and select the **Class**.

Expand/Collapse All

 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

 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

- 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

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	The *Policy* tab is located under the *Gear* icon *> Settings > Policies. O*n the *Policy* 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. Once individual policies are created, move to *Step 2* to add Policies to Policy Groups.
Step 2 - Create a Policy Group	The *Policy Groups* tab is located under the *Gear* icon *> Settings > Policies > Policy Groups*. On the *Policy Groups* (tab), you can create a policy group and use the row menu ⋮ to edit and remove groups. Optionally, you can select a basic or default policy group that customers need to agree to when there is *no class enrollment*. Proceed to *Step 3* to assign the Policy Groups to classes.

Step 3 - Assign Policy Groups to Classes	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. Policy groups can be added to an individual class or multiple classes. For multiple classes, go to the *Classes* menu > *All Classes*, filter the classes as needed, and add the policy groups. Add a policy group to a single class using the *Policies* tab in the *Class* record.
Step 4 - Select Parent Portal Setting	The *Parent Portal* setting is located under the *Gear* icon > *Settings* > *Parent Portal* > *Settings* (tab) > *Class Enrollment Settings* section. Check the box for *Require policy agreement for each enrollment* 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.

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.

Expand/Collapse All

 Policies & Policy Groups User Permissions

 Policies in the Family Record

 Policies and the Lead File

 Frequently Asked Questions

A set of Default Policies is added to each Jackrabbit system 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 the Information in Grids

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

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.

Expand/Collapse All

 Group Your Data

 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	Once filters are selected, it's simple to save your favorite views:
	
	1. Filter the grid for the information you are looking for.
	    ◦ Use the *filter (icon)* ▽ or click on a data visual.
	    ◦ Adjust column widths as needed.
	2. Click the **Save as favorite** (icon) 🖫 .
	    ◦ 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	Load or open a saved favorite: 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. 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 *Make this your default view?* to the right. Click **Save**.

Delete a Favorite	If you created a Favorite, you will be able to delete it: 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 **Notes** feature, you can create and keep detailed and searchable notes regarding your families, students, classes, and staff.

The Family, Student, Class, and Staff records each include a Notes tab where you create and store your related notes, and the Notes report 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.

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

The Notes Tab

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

Pin important notes to the top of the list. The most recently pinned note will appear at the top of the list for all Users.

Expand/Collapse All

Expand each section below to learn more about working with Notes.

 Add a Note Directly to the Family, Student, Class, or Staff Record

 Add a Note from the Families (menu) > All Families

 Add a Note from the Students (menu) > All Students

 Add a Note from the Classes (menu) > All Classes

Edit or Delete a Note

 The Notes Report

 Tag Notes

Jackrabbit offers several ways to note important business information. 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

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

⭐ Add a resource to a Class record to share with both parents through the Parent Portal and staff via the Staff Portal, or add it to a Student record to share with parents in the Parent Portal.

⭐ Limit access to sensitive documents to only Users with the required permissions.

⭐ Retain resources when a family is placed in the Lead File and later restore them.

Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review **User Permissions for Jackrabbit Resources**.

The Resources Tab

Each record features a Resources tab where you can upload files and add links (URLs). For example,

add a Google Doc link with instructions in the Class record or upload a permission form document to the Family record.

- The Resources tab in each of the Family, Student, Class, and Staff records displays the number of resources on file. Resources (2)
- Each record type can store up to 15MB of data, with usage shown as a progress bar and available space counted down.
- Sort the resources by date created, modified, or alphabetized by resource title or filename.
- Each resource card displays a timestamp for the date created, the User who added the resource, the resource name, file name or URL, time/date, and the name of the User who last modified the resource.
- A badge indicates 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.
- A resource shared to the Parent or Staff Portal will display a badge in the Class record to indicate that it has been published. STAFF PARENTS
- A resource shared to the Parent Portal will display a badge in a Student record to indicate that it has been published. PARENTS
- **Manage** each resource via the links in the Resource card to Edit, View, or Delete.

Class: Allstars Youth

The number of resources displays on the tab.

| SAVE CHANGES | DELETE |

| Summary | Enroll List | Drop List | Absences | Makeups | Waitlist | Instructors | Lesson Plan | Skills/Levels | Misc | Costumes | Notes (0) | Resources (2) | Policy Groups (1) |

2 Resources

Sort all resources in the record.

TOTAL SPACE: 15MB   15.0MB left   + NEW

⇅ Date Modified: Newest to Oldest ▼

Added August 31, 2023 9:36 PM // by solsoneds   PARENTS
Virtual Class Info
Virtual Class Info - Mondays.docx

Manage the resource.

EDIT   VIEW   DELETE

Expand/Collapse All

◻ Add a Resource in a Family or Staff Record

◻ Add a Resource in a Student Record

◻ Add a Resource in a Class Record

◻ Add a Resource to a Single Class in the All Classes Grid

◻ Add a Resource to Multiple Classes in the All Classes Grid

◻ Add a Class Resource in the Staff Portal

Manage Resources (Edit, View, Delete)

 Review **Jackrabbit's Terms of Use**. Uploading a file confirms you have agreed to the terms and that you have consent to possess the resource you are uploading.

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