

Lesson #2 - Update an Existing Family

Review (Optional)

The second lesson in this Learning Series, Front Desk Staff, is designed to get you familiar with updating existing families/accounts. You may wish to review the articles listed below before beginning.



The review articles in the bullet list below will open the Help article in a new tab. When you are finished reviewing the material, close the tab and return to this page to access the next article using the links below.

- [Active vs Inactive Families](#)
- [The Family Record](#)
- [Work With All Families - View, Search, and Mass Actions](#)
- [Work with All Students - View , Search, and Mass Actions](#)
- [Search for People in your Database](#)
- [Contacts in the Family Record](#)

Add a Student

From within Jackrabbit, adding a student to an existing family is as simple as clicking the **Add Student** button in a *Family* record.

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 (2) Resources (1)

Primary Contacts

View 1 - 2 of 2 Print Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID
Holly Ager	Mother	(704) 374-2415		(704) 374-2415	hollvaser41@gmail.com	Yes	Yes	hollvaser41@gmail.com
Victor Ager	Father	(704) 374-2415		(704) 374-2415	agingvictor@gmail.com	No	Yes	agingvictor@gmail.com

If the family has not yet been created in your Jackrabbit system, you will need to add them. You can add the family and student information in one step from one of the following:

- Families (menu) > All Families > Add New Family (icon)  > Use Quick Registration Form (button)
- Families (menu) > Quick Registration

See [Add Families/Accounts](#) for more information.

Merge Duplicate Family Records

Occasionally you may find a duplicated Family record in your system. Jackrabbit attempts to prevent possible duplications with a detection utility; however, there may be instances where a duplicate family is produced. These duplicate records can be combined using *Merge Families under the Families (menu)*.

Note: A user must have the Merge Families/Accounts permission in the Families category to have the ability to merge duplicate Family records.



Caution should be used when merging families; there may be a fee involved to have the families restored.

Merge Families moves information from one Family record to another Family record. Not all information is moved, so the designation of which Family record to move information **FROM** and the Family record to move the information **TO** is very important.

This information in the FROM family will be merged into the TO family:

- *Students and Contacts - **Note:** If the same student/contact exists in both families (same first and last name), the **TO** Student/Contact record is kept and is **not updated***. Any information in the **FROM** Student/Contact record that is not in the **TO** family Student/Contact record must be manually added to the **TO** family Student/Contact record before the merge is done. Example: If the **FROM** Contact record has a Portal User ID and the **TO** Contact record does not, it must be manually added to the **TO** family Contact record before the merge, or it will be lost.
* with the exception of enrollment*
- *Class Enrollment - Current, Past, Future, and Waitlist*
- *Event Enrollment*
- *Transaction History*
- *Web Registrations*

This information in the FROM family will NOT be merged into the TO family (these fields in the TO family are NOT updated):

- *Summary tab*: Registration date, Primary Phone, Address, Neighborhood, Problem Account status.
- *Billing Info tab*: Credit card/Bank account information, Membership Type, ePayment Schedule, Family Discount, Fixed Fees, Billing Instructions.
- *Misc tab*: Email history, Family User-defined fields, Contract dates, Booster, Referral, Emergency Contact, Enrollment Form, Notes, Source, Prospect, Portal messages.



The **FROM** family will be deleted after their information is merged into the **TO** family. All information that does not merge should be manually copied into the **TO** family **prior** to doing the merge.

Merge Two Family Accounts

1. Point to the **Families** (menu) > **Merge Families** or click the **Merge Family** button from within a Family record.
2. Click the **Search** link in the *From* section to open the Family/Account Search pop-up. If the *Merge Families* button was used to start the merge, that family will be populated into the *From* section.
3. Enter the first few letters of the **Family/Account Name** and click **Search**
4. Click to select the Family record that you want to move the information **FROM**.
5. In the *To* section, click the **Search** link and select the Family record that you want to move the information **TO**.

Merge Families

[← RETURN](#)

Merge Families moves information from one family to another family.

This information will be moved

- Contacts
- Students
- Current Enrollment
- Event Enrollment
- Transaction History
- Online Registrations

Billing information will NOT be moved, Last Policy Agreement Date will NOT be moved

From

Move information from this family: [Search](#) [Clear](#) [View This Family](#)

Family ID: 20608430

Date Created: 08/03/2020

Contacts:

Students:

Address:

City: Huntersville

The Family ID is located on the bottom left of each page of the Family record and can be used to confirm the correct families are being selected.

Click View This Family to open the Family record in another window where you can view the family details and verify it is the correct family.

Click to change the order of the FROM and TO families.

To

To this family: [Search](#) [Clear](#) [View This Family](#)

Family ID: 18964418

Date Created: 09/03/2019

Contacts: Samantha Zackmann

Students: Cindy

Address: 385 Great Lakes Blvd

City: Huntersville

This family should have the most up-to-date billing information.

I understand the From family will be deleted after their information is moved to the To family and I cannot undo this action.


[Merge](#) [Cancel](#)

6. Confirm your selections and check the box to indicate that you understand that the FROM family will be deleted after the merge.
7. Click **Merge**.
8. Click **Ok** in the warning pop-up window to complete the merge or click **Ok & View Merged Family** to be taken to the newly merged Family record.

[Expand/Collapse All](#)

Frequently Asked Questions

Edit a Family Name

1. Locate the family you would like to update:
 - Go to **Families** (menu) > **All Families** > select the row menu  for the family >

click *View/Edit* to open the family record.

- Use the global search at the top of each page to locate the family.

2. Click the **Family Name** button.

3. Enter the new name in the *Rename Family* pop-up box. Indicate whether the change should apply to:

- none (leave alone)
- All (Students and Contacts)
- Students Only
- Contacts only

4. Click the **Save** button.

The screenshot shows the 'Family: Norman' interface. At the top, there are buttons for 'Return', 'Save Changes', and 'Delete'. Below that is a navigation bar with buttons for 'Make Sale/Post Fees', 'Payment', 'Refund', 'Statement', 'Add Student', 'Add Contact', 'Archive Family', 'Family Name', 'Email', 'Email Schedules', and 'Merge Family'. The 'Family Name' button is highlighted with a yellow box and a yellow arrow pointing to the 'Rename Family' pop-up box. The pop-up box has a title bar 'Rename Family' and contains the following text: 'Enter New Name: [text input]', 'Change Lastname of: All (Students and Contacts) (if matches current name)', and 'Save' and 'Cancel' buttons. Below the pop-up box, there is a 'Students' table with columns for 'First Name', 'Last Name', 'Active', and 'Gender'. The table contains three rows: 'Alex Norman', 'Carter Norman', and 'Sarah Norman'. The 'Active' column for all three rows is 'Enroll' and 'Y'. The 'Gender' column contains 'Male', 'Male', and 'Female' respectively. At the bottom of the interface, there is a 'Registration Date' of '4/27/2016' and a 'Status' of 'Active'.

Delete a Family

Once you have decided to delete a family from Jackrabbit, it must be done in the following order:

- Drop students from all classes.
- Delete all students.
- Delete the family.

Drop and Delete Students from All Classes

1. Locate the family you want to delete:

- Go to **Families** (menu) > **All Families** > select the row menu: for the family > click *View/Edit* to open the family record.
- Use the global search at the top of each page to locate the family.

2. Click on the student's first name to open their *Student Record* > *Summary* (tab).

3. Click the **Drop** link in the last column.

4. Complete the **Drop from Class** information. Select the *Drop Date* and a *Drop Reason*. Add *Notes* if

applicable.

5. Click **Drop**. The student will be removed from the class on the selected drop date.
6. Click **Delete** after all classes are dropped. The *Student Record* will be deleted.

Repeat the process until all students in the family have been dropped from their classes and their records deleted.

Delete the Family

If a family has no students and no enrollment, it may be deleted by clicking the **Delete** button in the *Family Record*. You also have an option to archive a family. If you choose to archive a family, the family will be moved to the Lead File and the family can be restored at a later date. Families in the Lead File do not count towards your Jackrabbit subscription fee.

When you choose to permanently delete a family you are presented with two options:

- *Delete Family and Save Transactions* - keeps the financial information and it will appear on reports with but no Family/Acct name associated with it.
- *Delete Family and Transactions* - all family information is deleted from the system and can't be restored.

Family: Wallace

← RETURN **SAVE CHANGES** **DELETE**

Click to delete the family account when all the students are removed.

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

Summary **Contacts** Classes Events Transactions Billing Info Misc Notes (0) Files (0)

Primary Contacts

All family contacts are deleted when the family is deleted.

View 1 - 1 of 1 Print Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Livv Wallace	Mother	(704) 555-1241		(704) 555-1241	wallacelivv@gmail.com	Yes	Yes	wallacelivv@gmail.com	3/6/2020 5:40:00 PM

Students

All students must be dropped and deleted **BEFORE** the family account can be deleted.

View 1 - 4 of 4 Print Refresh

First Name	Last Name	Enroll	Activi	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Livv	Wallace	Enroll	Y	Female	1/18/1985	35 yrs, 1 mths			Adult Ninja Parkour(John L.)(100)	0	
Olivia	Wallace	Enroll	Y	Female	7/11/2008	11 yrs, 7 mths			Tumbling L2 - Mon 6pm(Stephanie A.)(67.50)	0	



Once deleted, family information is not recoverable. As a Best Practice, consider archiving a family to the **Lead File** instead. Families moved to the Lead File retain basic information and can be restored. Families in the Lead File are not considered when determining your Jackrabbit subscription fee.

Special Settings - Problem Accounts (Families)

There may be instances where you find it necessary to 'flag' a family/account as a **Problem Account**. A family flagged as a Problem Account can still log in to their Parent Portal to make payments and review their account.

Flag a Problem Account

1. Locate the *Family* record.
 - o Go to the **Families** (menu) > **All Families** to locate the family.
 - o Use the global search at the top of each page to locate the family.
2. Click the **Summary** tab.
3. Select the checkbox for **Problem Account**.
4. Click **Save Changes**.

Family: Owers

← 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 (0) Resources (0)

View 1 - 1 of 1 Print Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
David Owers	Father	(704) 555-7721		(704) 555-7721	dowers@email.com	Yes	Yes	dowers@email.com	

Students

View 1 - 1 of 1 Print Refresh

First Name	Last Name	Enroll	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Ashlee	Owers	Enroll	Y	Female	10/22/2007	13 yrs, 4 mths			Tumbling L2 - Mon 6pm(Stephanie A.)(67.50)	0	0

Current Balance **145.00** **Problem Account**

Location: SUP Status: Active Registration Date: 8/23/2019 Home or Primary Phone: (704) 555-7721

When a family account is marked as a *Problem Account* the *Misc* tab turns red.

When a family account is marked as a *Problem Account* it will display as red on the *Summary* tab.

Locate Problem Accounts

To identify Problem Account families, go to the *Families (menu) > All Families* and filter for *Financial Details > Problem Accounts > Is Problem Account?* In addition, any family marked as a problem account will be displayed in **red** in the *All Families* grid or in the list of families located using *Global Search Results*.

Prevent Problem Families from Enrolling

When a family is flagged as a Problem Account, it is possible to prevent them from enrolling in classes and events via the Parent Portal.

Go to the **Gear** icon > **Settings** > **Parent Portal** > **Settings**(tab) > **Class Enrollment Settings** > **Prevent Problem Families from enrolling in Classes and Events** and select the checkbox. **Save Changes**. The family will continue to have access to the Parent Portal but won't be able to enroll. Parents will see this message, "There is a problem with your account and you cannot enroll at this time, please contact us

directly."

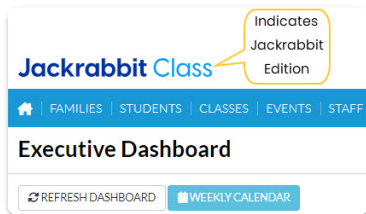


To deny their access to the Parent Portal, open their Contact record, and deselect the **Allow to Login to Parent Portal** field in the Portal Information area.

Practice - Update an Existing Family

Want to practice what you've just learned? Great!

- Go to <https://app.jackrabbitclass.com/jr4.0/Login> and log in with the credentials below for your Jackrabbit edition.
- Go through some or all of the practice scenarios below as they apply to you.



Edition	User ID	Password
Cheer	LMSCheer	Training1
Class	LMSCClass	Training1
Dance	LMSDance	Training1
Music	LMSMusic	Training1
Swim	LMSSwim	Training1



The Practice Database is refreshed each day at approximately 5:00 am Eastern Standard Time. Anything you enter will be erased at that time.

Determine the family/student information your organization requires for each family.



Use fake names, addresses, etc. as any information you add could be viewed by others outside of your organization.

- Make up your own fake names or click [here](#) to open a website that generates fake names.
- Make up your own fake addresses or click [here](#) to open a website that generates fake addresses.

Add a student to an active family.

1. Go to Families > All Families and select a family.
2. Click the Add Student button on the family page.
3. Enter the information for the student in the popup window and click Save.
4. On the Student page, enter more student information as needed.
5. Click Save Changes.

QUIZ - Lesson #2 - Update an Existing Family

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 Review questions.

Quiz #2 - Update Existing Families/Accounts

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 Front Desk Staff Menu to continue to next lesson](#)

[Click here to provide feedback for this lesson](#)

Optional Topics - Lesson #2

Review the following articles if they apply to your organization.

Assign Sizes to Students

Student sizes can be entered directly into Jackrabbit or recorded on a [Measurement Worksheet](#) to be entered into Jackrabbit at a later date.



When you use the Staff Portal, you can enable staff to view and update student sizes through the Portal. Learn more about [General Staff Portal Settings](#).

**Expand/Collapse
All**

- ▢ [Enter Sizes/Measurements in a Class Record](#)
- ▢ [Enter Sizes/Measurements for a Student in a Student Record](#)
- ▢ [Mass Delete All Student Sizes](#)




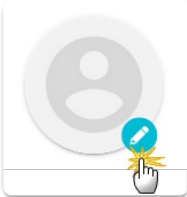
A student's girth must be entered for Jackrabbit's Costume (Apparel) [Auto-Size](#) feature to work properly.

Add a Student's Picture to the Student Record

A student's picture can be added to their record so that it is displayed in the Parent Portal, the Staff Portal, and when using the Barcode Scanner for attendance tracking. As well, it is possible to display a picture on Student Information Sheets if it has been uploaded to the student's record.

When you upload a picture, Jackrabbit will automatically resize the image and center it. A student

picture can be added from several areas in Jackrabbit:

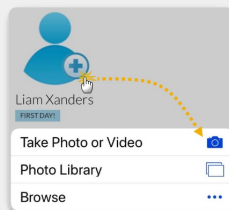
<p>The Student record</p>	<ol style="list-style-type: none">1. Go to the Misc tab in the student's record.2. Click the Pencil icon on the photo placeholder to upload the picture.  <ol style="list-style-type: none">3. Select the student picture from a file.4. Click Save Changes.
<p>The Parent Portal</p>	<ol style="list-style-type: none">1. Select Billing & Payments in the Parent Portal <i>Dashboard</i>.2. Select Students and then click View (student name).3. Click the Pencil icon to edit the student information.4. Click the Pencil icon on the photo placeholder to upload the picture. 

The Staff Portal

1. Click the **Attendance** button in the Staff Portal **Manage Classes** tab.
2. Click the **+** icon to upload a student's picture.



When the Staff Portal is launched from a smart device, such as an iPad or iPhone, staff can take a student's photo and add it on the spot!



Change Student Grade Levels

The *Grade Level* field on the Summary tab of the Student record can be increased or decreased by one grade level for all students at once. Any Jackrabbit User with the Student permission *Clear Answers in Student User-defined Fields and Update Student Grades* can update grade levels.





If you opted to use Custom Grade Levels in your [Organization Default Settings - Student Settings](#), you won't have the option to update the grade levels in mass. The Update Grade Levels option is only visible in the Students menu when the *Custom Grade Level* setting is set to No (Gear icon > Settings > General > Organization Defaults > Student Settings).

1. Go to the **Students** menu > **Update Grade Levels**.
2. Select your **Action** - Increase Grade Levels by One or Decrease Grade Levels by One.
3. Select a date **For Students Created Before**. Students who were added after this date will be ignored because their grade level is assumed to be correct for the coming year.
4. Click **Submit**.

☐ Mass Clear Student Grade Levels

Can I mass delete information that is filled in under a Family's or Student's User-defined fields?

Yes, you can mass delete all answers in User-defined fields from the *All Families* menu. From the *Families (menu) > All Families* select multiple families in the 1st column you wish to update or leave the 1st column unchecked to select all the families. Click *More (Mass Actions button)*  and select *Clear UDF Answers*.

You can mass delete the User-defined fields for ALL students at once from *All Students*. Go to *Students (menu) > All Students* leave the check box blank in the 1st column to select all students. Click the *More (Mass Actions button)*  and select *Clear UDF Answers*.

User Permissions

The User ID must have the permission under Families to process a mass delete: *Clear Family User Defined Fields* and *Family/Student Fixed Fees and Discounts*.

QUIZ - OPTIONAL - Update an Existing Family

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.

Quiz - Optional - Update an Existing Family

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
9	9	8	7	6

[Return to Front Desk Staff Menu to continue to next lesson](#)

[Click here to provide feedback for this lesson](#)

