Lesson #8 - Enroll/Register Families/Students into Events from Within Your Database

Review (Optional)

The eighth lesson in this Learning Series, Front Desk Staff, is designed to get you familiar with enrolling/registering families or students in events from within the database. 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
- Work With All Families View, Search, and Mass Actions
- Work With All Students View, Search, and Mass Actions
- Search for People in your Database

Events



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for Events**.

Jackrabbit's Events Management feature is great for handling birthday parties, parent's night out, workshops, and more.

Using Events, you can:

- Add questions specific to the event that registrants can answer prior to submitting registration.
- Add agreements (policies) specific to the event that must be accepted prior to submitting the registration.
- right Post an Event Calendar on your website.
- Allow customers to register themselves for an event via your website.
- 🜟 Auto-post the Event Fee and email the event registrant.
- reate a Calendar Notice (example: Studio Holiday Closing) that is viewable on the Calendar.



Jackrabbit classes and events are treated very differently, both in terms of how they are created and how they are managed. Visit **Compare Events & Classes** in Jackrabbit for a summary of the similarities and differences between them.

Add an Event

Expand/Collapse All

- **⊗** Registration and Enrollment for Events
- Post Event Fees
- ▼ Take Your Events Online
- Other Ways to Use Events
- **Event Reports**

Add an Event - Step 1-Create the Event Type

The first step in creating an event in your database is to create the Event Type. Think of this as the umbrella and all of the specific occurrences of that type of event (dates and times) are held under that umbrella. The Event Dates & Times are created in the second step.

Create an Event Type

- 1. Go to Events (menu) > Add Event Type.
- 2. Give the Event Type aName, Location, and Category 1.
- 3. Click Save.



- 4. Enter specifics about the event on the *Summary* tab of the *Event Type* record. Each field on the Summary tab is explained in detail below. While the fields are optional, we recommend you complete as many as possible. **Save Changes**.
 - ▼ <u>Click here</u> to see **Event Type Summary Fields** Explained

Fee	Enter the cost of the event per registrant as the Event Fee .			
Allow Enrollment For	Select Family if you prefer to allow a customer to enroll their Family and fill 1 Event opening. Select Student to allow the customer to enroll up to 5 students and fill 1 event opening per student. Note: What you enter here will be the default for all Event Dates/Times but it can be changed for any of the event dates individually.			
Min Age/Max Age	Enter a minimum and maximum age for the event, including years and months. The min/max age can be used to set age restrictions for event registrations. Note: Minimum Age and Maximum Age are only factored in if Allow Enrollment For is set to Student.			

Cut Off Date	Optionally, enter a Cut Off Date . If a cut-off date is entered, the student's age on the cut-off date is used to determine if the student meets the event's age requirements. Note: Cut Off Date is only factored in if Allow Enrollment For is set to Student.			
Category 1	Select a Category 1 to have assigned to all of the event fees.			
Cat 2/Cat 3	Add a Category 2/Category 3 if applicable. These fields will further classify the event fees.			
Maximum Size	Enter a Maximum Size for the event. Note: For a Birthday Party or Private Event, enter the Maximum Size as 1. This ensures that the event is booked by only one customer.			
Payment Method Information	Do you require parents to save a payment method before enrolling in this Event Type? • If ePayments is not set up, this section is NOT visible. • If ePayments is set up, you will see aPayment Method Information section with Credit/Debit Card Information field and a Bank Account Information field (Yes/No/Optional). If payment in the Parent Portal is required, they will also see a checkbox for Omit this Event Type from requiring payment during Parent Portal enrollment. Select Yes to require that the credit card fields be completed. SelectNo to not display the credit card fields. Select Optional to display the fields but allow the registrant to choose whether or not to add credit card details. Note: The option to pay via bank account is not available when registering for an event. This field would only be capturing that information to secure the booking.			
Post Event Fee Per	Select Family to auto-post the Event Fee once per Family. Select Student to auto-post the Event Fee once per student. Select Do Not Post Fee if you do not want the event fee to automatically post when a customer registers.			

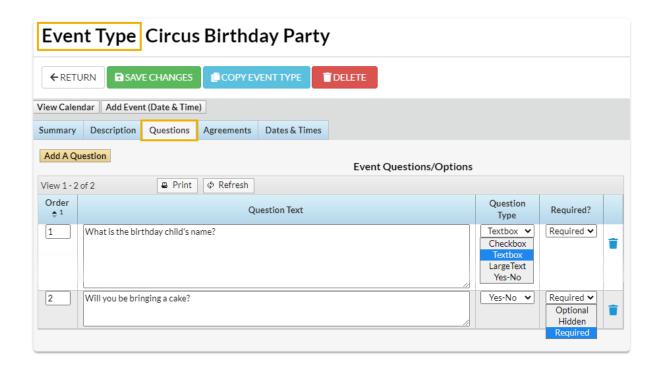
Session	Add a Session from the Session drop-down choices.				
Transaction Type / Sub-Type / Note	If Post Event Fee Per is either Family or Student , include a Transaction Type . Optionally, include a Sub-Type and Note .				
Display on Internal Calendar	Select Yes/No depending on whether this Event should display on the internal Event Calendar. This calendar can only be seen by a User logged into Jackrabbit.				
Calendar Label	Whatever you type here will display as the Event Name on the Event Calendar.				
Background Color	Click the crayon icon to choose a color. This color will display as a background for the <i>Calendar Label</i> on your Event Calendar. We recommend using lighter colors as they make the calendar easier to read.				
Display to Customers	 How do you want this Event Type to display on your Event Calendar: Select No if you do not want the event to display on your Event Calendar. Select Open Dates Only if you prefer only open events to be displayed on your Events Calendar. Select Open & Booked Dates if you prefer that both open & booked dates display on your Event Calendar. Note: An Invitation Only Event will not display on your Event Calendar, regardless of this setting. 				
Calendar Header	Create a header for your Event Calendar that displays when it has been filtered for a specific Event Type. The Event Calendar below is filtered for the Event Type Circus Birthday Party. It has a Calendar Header				

Online Reg Form Graphic URL	Customize your event registration form with special images or graphics for specific events. In order for the image to be displayed on your registration form, it needs to reside somewhere on the internet and have a URL (a web address that usually starts with https:// or http://). Enter that URL here. See Frequently Asked Questions below for more details.			
Notification Email(s)	An email notification will be sent to the email address(es) entered here whenever a customer registers for an event. Separate multiple email addresses with a comma.			

- 5. Go to the **Description** tab and add the *Internal Description* (this description is seen by Users within Jackrabbit) and the *Registration Form Description* (this description will be seen by customers). **Save Changes**.
 - ▼ Click here to see a sample Event Registration Form



- 1 Customize your registration form with a graphic of your choice. It must 'live' online and have a URL and that URL is added to the **Event Type** > **Summary** tab, in the **Online Reg Form Graphic URL** field.
- 2 Add a description of the event to your registration form.
- 6. Add questions that you would like event registrants to answer on the Questions tab, for example, "Will you be bringing cake?" Questions can be formatted as Check box, Text box, Large Text, and Yes-No. Questions can be set to Optional, Hidden, or Required, with the exception of checkbox questions that can't be made required.
 Answers are stored in the Event Date/Time record on the Questions/Optionstab. From there, you can print the answers for that event date or export them (Excel, .csv, or PDF).
 - ▼ Click here to see a sample Event Type Questions tab



- 7. Select the **Agreements** tab. Enter any legal policy or verbiage you'd like the customer to agree to prior to registering for an event. Each agreement text record will be followed by its own *I Have Read and Agree checkbox* on the Event Registration Form. The customer must check these boxes and enter their e-signature in order to submit the registration form.
 - ▼ Click here to see a sample Event Type Agreements tab



Click **Copy Event Type** to quickly create another similar Event Type. This will copy all information on the Event Type Summary tab to the new Event Type with the option to copy questions and agreements.

Now that the Event Type is set up, you can move on to the second step of adding an event, which is to create the specific dates and times that this Event Type will occur.



Expand/Collapse All

Add an Event - Step 2-Create Event Dates/Times

Once you have completed the first step in adding an event, adding an Event Type, you'll need to add

specific dates & times when the event will occur so they can show up on your Event Calendar.

Expand/Collapse All

- **⊘** View Event Dates
- **⊗** Frequently Asked Questions



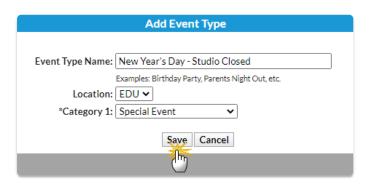
Create an Event Type and send a private direct link to specific people to invite them to enroll in specific dates/times. Learn how to <u>Create an Invitation Only Event Date</u>.

Event Notices (Event Date Status = Notice)

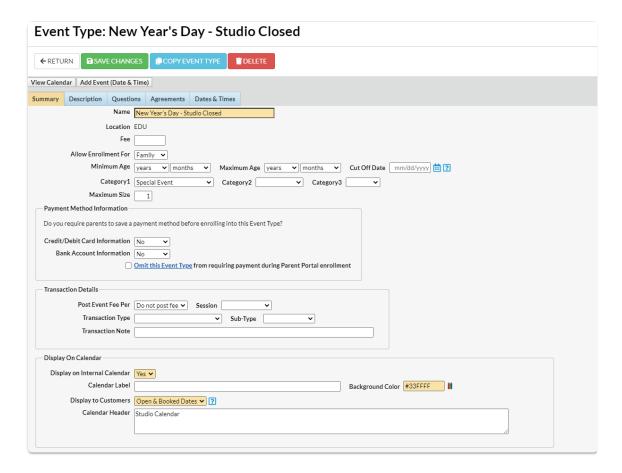
An Event with the *Status = Notice* allows your organization to add viewable information to your Event Calendar that does not allow registration. For example, you can add an announcement that your facility will be closed on a specific day.

Add an Event Notice

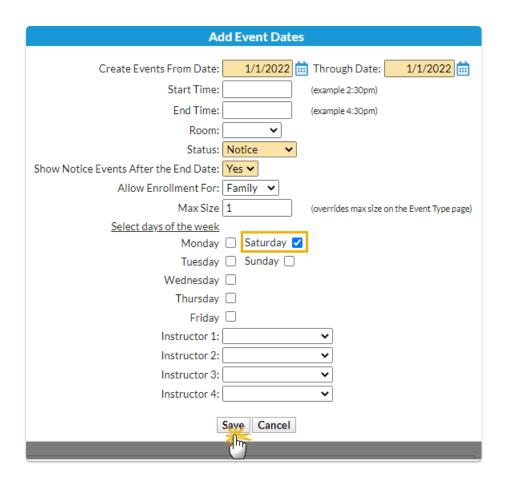
- 1. Point to the Events (menu) and click Add Event Type.
- 2. Add an **Event Type Name**. Category 1 is not relevant since this event won't allow for enrollment or revenue, however you must enter one.
- 3. Click Save.



- 4. When the Event Type page opens, complete the following:
 - o Give the Event Type a Name
 - Set Display on Internal Calendarto Yes
 - Select a Background Color (click on the crayon icon to open the color picker)
 - Select the drop-down Open & Booked Dates for Display to Customers



- 5. Click Save Changes.
- 6. Click the Add Event (Date & Time) button.
- 7. Add the specific date and select Status = Notice.
- 8. Select **Show Notice Events After the End Date = Yes**to keep the Notice on the Calendar after the date has passed; leave as **No** to have the event removed from the Calendar after the event date has passed.
- 9. Click Save.



Event Calendar

The *Notice* displays on the *Event Calendar*, however, the event is not a clickable link that opens a registration form.

<< Previous Month			January 2022			Next Month >>
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1 New Year's Day - Studio Closed
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Post Event Fees

Event Fees can be posted manually for an individual event enrollee or for all students/families at once. When you take your events online, you can set Event Fees to post automatically for enrollments done through Online Registration or through the Parent Portal.

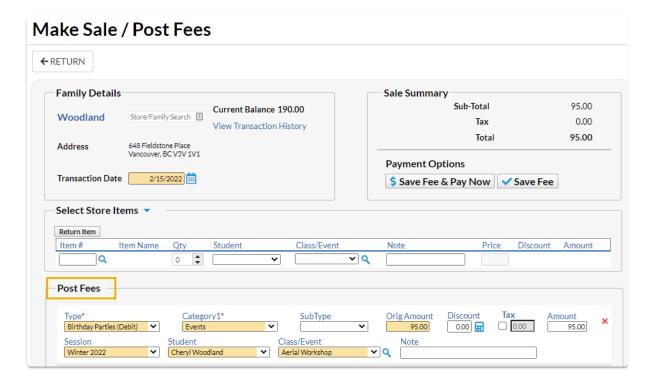
Post Event Fees Manually



If you prefer to post fees manually, set the *Post Event Fee Per* field to **Do Not Post Fee** on the *Summary* tab in the *Transaction Details* for the event.

Post an Event Fee to an Individual Event Enrollee

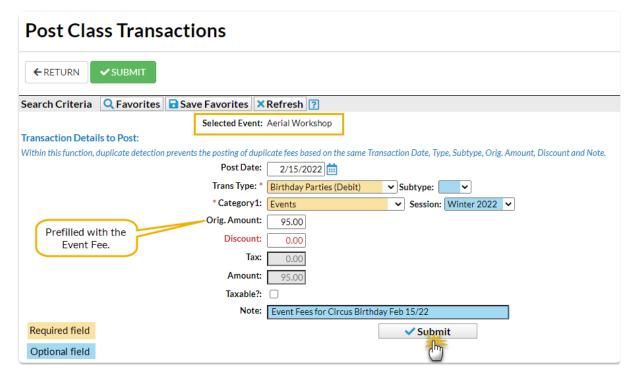
- 1. Go to the **Enrollment** tab of the Event (Date/Time) record.
- 2. Use the **link** in the *Family* column to open the *Family* record.
- 3. Click the Make Sale/Post Fees button in the Family record.
- 4. In the Post Fees section, select the (Transaction) Type and Category 1 and enter the Event Fee in the Orig Amount field.
- 5. We also recommend adding the optional fields *Session*, *Student* (if posting by student), and *Class/Event* selection.
- 6. Click Save Fee & Pay Nowor Save Fee to post the fee to the family's account.



Post an Event Fee to all Event Enrollees

1. Go to the Events menu and select List Dates & Times.

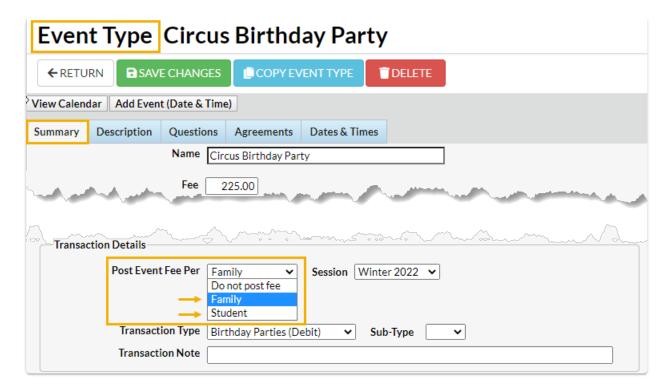
- 2. Enter a single date or date range and optionally filter by (Event)Status. Click Submit.
- 3. Locate the event you want to post fees for and use the link in the Date column to open the Event (Date/Time) record.
- 4. Click the **Post Event Fees** button to open the *Post Class Transactions* page where the event is preselected.
- 5. Select the **Trans Type** and **Category 1** and optionally add a **Subtype** and **Session**.
- 6. The Orig. Amount field will be prefilled with the Event Fee but can be edited if needed.
- 7. Optionally add a Note and Submit.
- 8. Use the link in the confirmation to view the transactions that were posted.



 Duplicate detection will prevent a fee from posting when another transaction has already been posted on the same *Transaction Date* (Post Date), *Transaction Type*, *Transaction Subtype* (if any), *Orig. Amount*, *Discount*, and *Note* (if any).

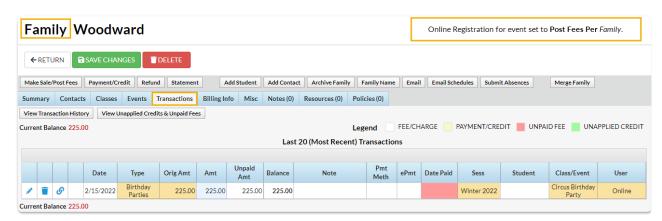
Post Event Fees Automatically for Online and Portal Registrations

When an Event Type is set to **Post Fees Per** either *Family* or *Student*, enrollments through Online Registration and from the Parent Portal will automatically be charged the Event Fee once per family or once per student.

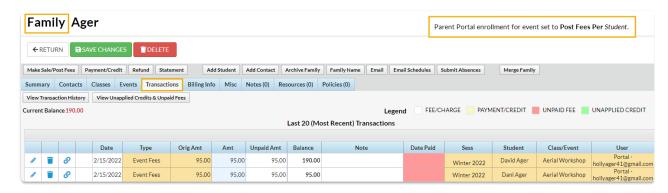


The fees will be posted to the Family record > Transactions tab.

Examples:



When set to **Post Fees Per** Family, one fee will post to the Family record (*Transactions* tab) for each enrollee. No name will appear in the *Student* column of the transaction because the registration was done for the family.



When a customer enrolls in an event set to **Post Fees Per** Student from their Parent Portal, the Event Fee will post once for each enrolled student and their name will appear in the transaction in the

Event Registration and Enrollment from Within Jackrabbit

Enroll an Existing Customer in an Event Date/Time

Follow the steps below to enroll an existing customer (family or student) in an event.

- 1. Go to the **Events** menu > **Calendar**.
- 2. Locate the appropriate date and time and click the Event Name.
- 3. Select **Enroll Existing Family** or **Enroll Existing Student** to enroll a family or student who already exists in your Jackrabbit system.
- 4. Click the Search link in the Event Enroll pop-up box to locate the family or student's existing record.
 - Once a student or family name has been selected, the name will appear in the Event Enroll window.
- 5. Click Enroll and OK to confirm.



Instructors for Events do not automatically receive an email enrollment notification. Event enrollments can be viewed on the *My Schedule* tab in the Staff Portal (see View Events Schedule). In addition, the instructor's email address can be added to the *Notification Email(s)* on the *Event Type > Summary* tab.

Register and Enroll a New Customer in an Event Date/Time

Follow the steps here to register and enroll a new customer (family or student) in an event.

- 1. Go to the Events menu > Calendar.
- 2. Locate the appropriate date and time and click the Event Name.
- 3. Select Quick Registration to register the new family.
- 4. Complete the fields on the *Registration Form* for this family or student. *Note:* The *Registration form* will allow students to be enrolled only if the event is set to allow for Student Enrollment. See Add an

Event for details on the difference between student-based and family-based event enrollment.

5. Click Submit Registration.



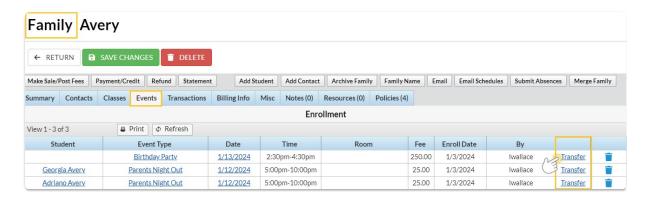
Quick Registration does not display any agreement text as the Jackrabbit user can't e-sign (check I Have Read and Agree) for a customer. For this reason, Jackrabbit recommends that the customer register from the Event Calendar on your website.

Transfer a Student/Family Between Event Type Dates

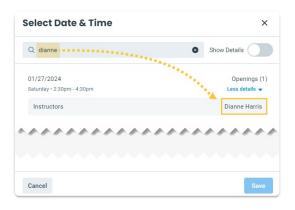
Occasionally, you may have the need to move a student or family's event registration from one date to another. Jackrabbit makes it easy to transfer an enrollment between dates within the same Event Type.

Follow this process to avoid having to delete the event enrollment and recreate it in the new date/time.

- 1. Go to the Family or Student record (depending on the enrollment) and select the Events tab.
- 2. Select the **Transfer** link to open the *Transfer Student* modal.



3. Click Select Date & Time to open a window to search for and select the Event Date/Time to transfer the enrollment to. The only Event Dates/Times that will appear are events that have an Open status. Use Show Details to see the instructor for an Event Date/Time. ClickSave.
TIP: The search field will look for events that contain your search term, e.g., a specific instructor or a specific time of day.



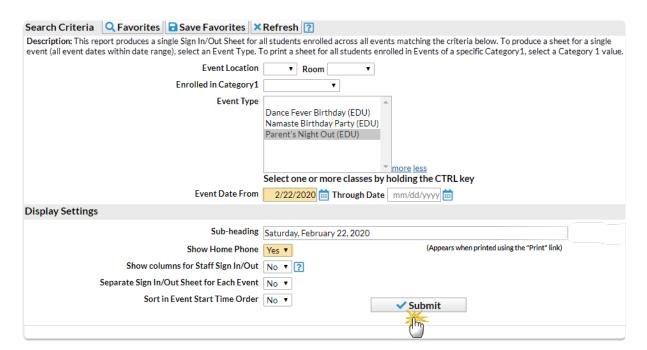
4. The *Transfer Family/Student* window will display the Event Date/Time you've selected in the *Transfer To* section. Confirm your selection and click**Transfer**. The event enrollment, along with answers to any questions recorded during the original event enrollment, are transferred to the new date/time.

Event Sign In/Out Sheets

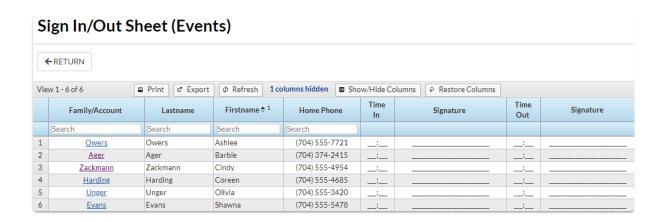
Create customized **Sign In/Sign Out Sheets** for an event. Using a Sign In/Sign Out sheet provides you with an attendance record for the event. You can print directly from Jackrabbit or export the file for another use.

- 1. Go to the Events (menu) > Event Reports > Event Sign In/Out Sheets.
- 2. Select multiple events using any combination of *Search Criteria* or select a single event as shown below.
- 3. Select *Display Settings* including a sub-heading and whether the attendee's home phone should display. Additional settings allow you to sort in event start time order and create a separate sheet for each event.

Note: You can also opt to add columns for your staff to initial when they sign in/sign out of an event.



- 4. Click Submit.
- 5. Print the Sign In/Out Sheet using the **Print** button.



QUIZ - Lesson #8 - Enroll/Register Families/Students into Events from Within Your Database

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 #8 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 #8 - Enroll/Register Families or Students in Events

TAKE THE QUIZ

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

- **Return to Front Desk Staff Menu to continue to next lesson**
- O Click here to provide feedback for this lesson