Lesson #8 - Events

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 and booking appointments from within Jackrabbit. 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**

Event Management Overview

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

Jackrabbit's Events Management feature handles birthday parties, parent's night out, workshops, and more.

⭐ Customize event registration by adding specific questions, agreements, and policies that must be completed before submission.

⭐ Display an event calendar on your website, allowing customers to register for events and view important notices like studio closures.

⭐ Automate event fee posting and send confirmation emails to registrants.

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.

 Frequently Asked Questions

Add an Event - Step 1-Create the Event Type

The first step in creating an event is to create the **Event Type**.

Think of the Event Type as the umbrella ☂. All the specific dates and times for that event fit under it, and you'll add those details in the **second step** of creating your event.

The Event Type customizes the registration form used for all occurrences of this type of event and defines things like payment policies and legal policies (agreements). These settings will be the defaults; however, they can be overridden for individual Event Dates/Times as needed.

To create an Event Type:

1. Go to **Events** (menu) > **Add Event Type**.
2. Add an **Event Type Name**, **Location**, and **Category 1**.
3. **Save** your changes. The Event Type is created and opens to the Summary tab.
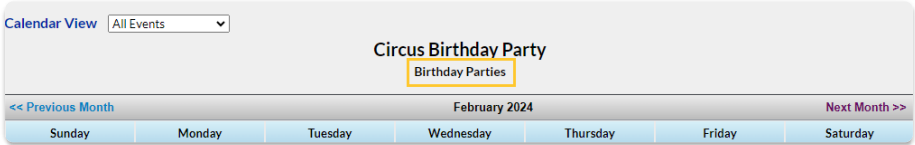
4. Enter specifics about the event on the Summarytab of the Event Type record. While the fields are optional, we recommend you complete as many as possible. **Save Changes**.

Event Type Summary Tab - 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 customers 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 Age** 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 only one customer books the event.

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 a Payment Method Information section with a *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. Select **No** to hide 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 unavailable 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 fee once per family. Select **Student** to auto-post the 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 be displayed 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 be a background for the *Calendar Label* on your internal Event Calendar. We recommend using lighter colors as they make the calendar easier to read.
Display to Customers	Select which event dates to display on your external Event Calendar and in the Parent Portal : ○ Select **No** if you do not want any dates to display. ○ Select **Open Dates Only** to display only those events with an open status. ○ Select **Open & Booked Dates** to display event dates with an open status and allow enrollment. Booked and unavailable event dates will also be displayed but will not allow enrollment. Note: Regardless of this setting, an Invitation-Only Event will not display on your external Event Calendar or in the Parent Portal.
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* assigned, Birthday Parties.

Online Reg Form Graphic URL	Customize your event registration form with special images or graphics for specific events. The image must reside somewhere on the Internet and have a URL (a web address that usually starts with https:// or http://) to be displayed on your registration form. Enter that URL here.
Notification Email(s)	Whenever a customer registers for an event, an email notification will be sent to the email address(es) entered here. Separate multiple email addresses with a comma.

5. On the Description tab, add the **Internal Description** (Users within Jackrabbit see this description) and the **Registration Form Description** (customers will see this description). **Save Changes**.

Sample Event Registration Form

- ○ **1** - Customize your registration form with a graphic of your choice. It must be 'live' online and have a URL, which 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. On the Questions tab, add questions that you would like event registrants to answer, such as "Will you be bringing cake?" Questions can be formatted as checkboxes, text boxes, large text boxes, and yes-no questions. They can also 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/Options tab. From there, you can print the answers for that event date or export them (Excel, .CSV, or PDF).

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.

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.**

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 Frequently Asked Questions

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.

The **Event Dates & Times** are added to the Event Type. Some events may take place only once, or they may be offered on several dates. Families or students are enrolled in a specific Event Date & Time.

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 **Create an Invitation Only Event Date**.

 Add Event Dates & Times

 View Event Dates

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:

- Give the *Event Type* a **Name**
- Set **Display on Internal Calendar** to **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.

January 2022

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 Now** or **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

Student column.

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. Click **Save**.
   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.

Sign In/Out Sheet (Events)

← RETURN

🖨 Print | ⧉ Export | ⟳ Refresh | **1 columns hidden** | ⊞ Show/Hide Columns | ⟲ Restore Columns

	Family/Account	Lastname	Firstname ⬍ 1	Home Phone	Time In	Signature	Time Out	Signature
	Search	Search	Search	Search				
1	Owers	Owers	Ashlee	(704) 555-7721	__:__	_____	__:__	_____
2	Ager	Ager	Barbie	(704) 374-2415	__:__	_____	__:__	_____
3	Zackmann	Zackmann	Cindy	(704) 555-4954	__:__	_____	__:__	_____
4	Harding	Harding	Coreen	(704) 555-4685	__:__	_____	__:__	_____
5	Unger	Unger	Olivia	(704) 555-3420	__:__	_____	__:__	_____
6	Evans	Evans	Shawna	(704) 555-5478	__:__	_____	__:__	_____

QUIZ - Lesson #8 - Events and Appointments

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 - Events and Appointments

TAKE THE QUIZ

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

 Return to Front Desk Staff Menu to continue to next lesson

 Click here to provide feedback for this lesson