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.

I 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 T. 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.

| Event Type Circus Birthday Party |
|--|
| ← RETURN SAVE CHANGES COPY EVENT TYPE COPY EVENT TYPE |
| View Calendar Add Event (Date & Time) |
| Summary Description Questions Agreements Dates & Times |
| Name Circus Birthday Party |
| Location Main |
| Fee |
| Allow Enrollment For Family 🗸 |
| Minimum Age years V months V Maximum Age years V months V Cut Off Date mm/dd/yyyy |
| Category1 Birthday Parties V Category2 V Category3 V |
| Maximum Size 1 |
| Payment Method Information |
| Do you require parents to save a payment method before enrolling into this Event Type? |
| and the second |
| |
| Online Reg Form Graphic URL |
| Notification Email(s) |
| |

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

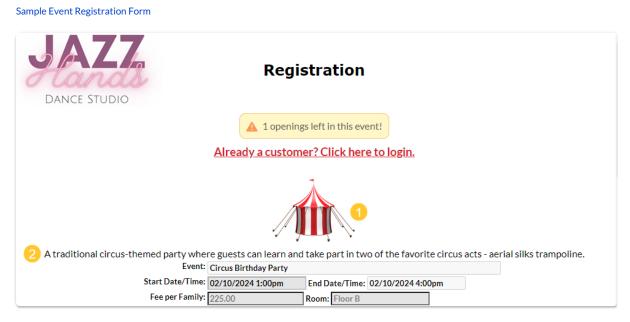
| Fee | Enter the cost of the event per registrant as the Event Fee. |
|-------------------------|---|
| Allow Enrollment For | Select Family if you prefer to allow customers to enroll their Family and fill 1 event opening. Select Student to allow the customer to enroll up to 5 students and fill 1 event 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 <i>Allow</i> <i>Enrollment For</i> 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: <i>Cut Off Date</i> is only factored in if <i>Allow Enrollment For</i> 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 <i>Credit/Debit Card Information</i> field and a <i>Bank Account Information</i> field (Yes/No/Optional). If payment in the Parent Portal is required, they will also see a checkbox for <i>Omit this Event Type</i> from requiring payment during Parent Portal enrollment. Select Yes to require that the credit card fields be completed. SelectNo 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 <i>Session</i> 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 <i>Calendar Label</i> 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 <i>Calendar Header</i> assigned, Birthday Parties. Calendar View AllEvents Circus Birthday Parties Circus Birthday Parties Kervious Month Pebruary 2024 Next Month >> Sunday Monday Tuesday Wednesday Thursday Friday Saturday |

| 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**.



- 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

| Ever | nt Type Circus Birthday Party | | | |
|--------------|--|--|--|---|
| ← RET | JRN SAVE CHANGES COPY EVENT TYPE DELETE | | | |
| View Caler | ndar Add Event (Date & Time) | | | |
| Summary | Description Questions Agreements Dates & Times | | | |
| Add A Qu | Event Questions/Options | | | |
| View 1 - 2 | of 2 🕒 Print 🔯 Refresh | | | |
| Order ♣ 1 | Question Text | Question Type | Required? | |
| 1 | What is the birthday child's name? | Textbox Checkbox Textbox LargeText Yes-No | Required 🗸 | T |
| 2 | Will you be bringing a cake? | Yes-No ¥ | Required V Optional Hidden Required | |

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

| Even | t Type Circus Birtl | nday Party |
|--------------|--------------------------------|--|
| ← RETU | RN SAVE CHANGES | Y EVENT TYPE |
| View Calend | dar Add Event (Date & Time) | |
| Summary | Description Questions Agreemen | ts Dates & Times |
| Add Agree | ement Text | Event Agreements |
| View 1 - 2 o | of 2 B Print Ø Refre | sh |
| Order 🗘 1 | Title/Label | Agreement Text |
| 1 | Media and photos/videos | Please be aware that we have a strong online presence and frequently post photos and videos from our birthday parties. This waiver serves as a media release, but please speak to us in person or send us an email if you wish to remain out of all media |
| 2 | Food and beverages | Food and beverages are permitted in designated areas only unless you've received prior written approval. |
| | | |



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.

I 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 <u>Create an Invitation Only Event Date</u>.

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.

| Add Event Type |
|---|
| Event Type Name: New Year's Day - Studio Closed |
| Examples: Birthday Party, Parents Night Out, etc. |
| Location: EDU 🗸 |
| *Category 1: Special Event |
| Save Cancel |
| 1 |

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 **i** to open the color picker)
- Select the drop-down Open & Booked Dates for Display to Customers

| Event Type: New Year's Day - Studio Closed | |
|--|----------------------------------|
| ← RETURN SAVE CHANGES | |
| View Calendar Add Event (Date & Time) | |
| Summary Description Questions Agreements Dates & Times | |
| Name New Year's Day - Studio Closed | |
| Location EDU | |
| Fee | |
| Allow Enrollment For Family | |
| Minimum Age years V months Maximum Age years V | months V Cut Off Date mm/dd/yyyy |
| Category1 Special Event Category2 Category2 | Category3 |
| Maximum Size 1 | |
| Payment Method Information | |
| Do you require parents to save a payment method before enrolling into this Event Type? | |
| Credit/Debit Card Information No | |
| Bank Account Information No V | |
| Omit this Event Type from requiring payment during Parent | Portal enrollment |
| Transaction Details | |
| Post Event Fee Per Do not post fee 🗸 Session 🗸 | |
| Transaction Type Sub-Type | • |
| Transaction Note | |
| Display On Calendar | |
| Display on Internal Calendar Yes 🗸 | |
| Calendar Label | Background Color #33FFFF |
| Display to Customers Open & Booked Dates 💙 ? | |
| Calendar Header Studio Calendar | |
| | |
| | <i></i> |

- 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.

| Ad | id Event Dates |
|--|---|
| Create Events From Date: | 1/1/2022 🛗 Through Date: 1/1/2022 🛗 |
| Start Time: | (example 2:30pm) |
| End Time: | (example 4:30pm) |
| Room: | ~ |
| Status: | Notice 🗸 |
| Show Notice Events After the End Date: | Yes 🗸 |
| Allow Enrollment For: | Family 🖌 |
| Max Size | 1 (overrides max size on the Event Type page) |
| Select days of the week | |
| Monday | |
| Tuesday | Sunday 🗌 |
| Wednesday | |
| Thursday | |
| Friday | |
| Instructor 1: | ` |
| Instructor 2: | ~ |
| Instructor 3: | ~ |
| Instructor 4: | ~ |
| | Saye Cancel |

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 Now or Save Fee to post the fee to the family's account.

| Family Details | 5 | | Sale Summary | |
|-----------------|-----------------------|--------------------------|-------------------------|--------------|
| | _ | Current Balance 190.00 | Sub-Total | 95.00 |
| Woodland | Store/Family Search | View Transaction History | Тах | 0.00 |
| Address | 648 Fieldstone Place | | Total | 95.00 |
| | Vancouver, BC V3V 1V1 | | Payment Options | |
| Transaction Dat | e 2/15/2022 🗰 | | Save Fee & Pay Now Save | e Fee |
| Select Store It | CIIIS * | | | |
| Return Item | | | Note Price Disc | count Amount |
| | Item Name Qty | Student Class/Event | 11000 11100 0151 | |
| | Item Name Qty 0 | | | |
| Item # | ~ ~ ~ | | | |

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.

| Post Class Transactions | | | | | | | | | | |
|--|-----------------|---|--|--|--|--|--|--|--|--|
| ← RETURN ✓ SUBMIT | | | | | | | | | | |
| Search Criteria 🔍 Favorites 🖬 Sa | ave Favorites 🗙 | Refresh ? | | | | | | | | |
| | Selected Event: | Aerial Workshop | | | | | | | | |
| Transaction Details to Post: | | | | | | | | | | |
| Within this function, duplicate detection preven | | licate fees based on the same Transaction Date, Type, Subtype, Orig. Amount, Discount and Note. | | | | | | | | |
| | Post Date: | 2/15/2022 | | | | | | | | |
| | Trans Type: * | Birthday Parties (Debit) V Subtype: | | | | | | | | |
| | * Category1: | Events Session: Winter 2022 V | | | | | | | | |
| | Orig. Amount: | 95.00 | | | | | | | | |
| Prefilled with the Event Fee. | Discount: | 0.00 | | | | | | | | |
| | Tax: | 0.00 | | | | | | | | |
| | Amount: | 95.00 | | | | | | | | |
| | Taxable?: | | | | | | | | | |
| | Note: | Event Fees for Circus Birthday Feb 15/22 | | | | | | | | |
| Required field | | ✓ Submit | | | | | | | | |
| Optional field | | 1 | | | | | | | | |

• 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.

| Event Type Circus Birthday Party | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|--|--|
| ← RETURN SAVE CHANGES COPY EVENT TYPE CELETE | | | | | | | | | | | |
| View Calendar Add Event (Date & Time) | | | | | | | | | | | |
| Summary Description Questions Agreements Dates & Times | | | | | | | | | | | |
| Name Circus Birthday Party | | | | | | | | | | | |
| Fee 225.00 | | | | | | | | | | | |
| Transaction Details | | | | | | | | | | | |
| Post Event Fee Per Family Session Winter 2022 | | | | | | | | | | | |
| Family Student | | | | | | | | | | | |
| Transaction Type Birthday Parties (Debit) V Sub-Type V | | | | | | | | | | | |
| Transaction Note | | | | | | | | | | | |

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

Examples:

| Family Woodward Online Registration for event set to Post Fees Per Face | | | | | | | | | | | | Family. | | | | | | |
|---|---------|------|--------|----------|---------------------|----------|--------|---------------|---------|------------------|----------|-------------|--------|-----------|-------------|-------------|--------------------------|--------------|
| ←RETURN ■SAVE CHANGES | | | | | | | | | | | | | | | | | | |
| Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email Email Submit Absences Merge Family | | | | | | | | | | | | | | | | | | |
| Summary Contacts Classes Events Transactions Billing Info Misc Notes (0) Resources (0) Policies (0) | | | | | | | | | | | | | | | | | | |
| View Transaction History View Unapplied Credits & Unpaid Fees | | | | | | | | | | | | | | | | | | |
| urre | nt Bala | ance | 225.00 | | | | | | | | Legen | nd | FEE/CH | IARGE | PAYMENT/CRE | DIT 📕 UNPAI | D FEE 📃 UNA | PPLIED CREDI |
| | | | | | | | | | Last | t 20 (Most Recen | nt) Trar | nsactio | ns | | | | | |
| | | | | | | | | | | | | | | | | | | |
| | | | | Date | Туре | Orig Amt | Amt | Unpaid Amt | Balance | Note | | Pmt Meth | ePmt | Date Paid | Sess | Student | Class/Event | User |
| <i>.</i> | Î | S | 2 | /15/2022 | Birthday Parties | 225.00 | 225.00 | 225.00 | 225.00 | | | | | | Winter 2022 | | Circus Birthday Party | Online |
| urre | nt Bali | ance | 225.00 | | | | | | | | | | | | | | | |

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.

| Fa | Family Ager Parent Portal enrollment for event set to Post Fees Per Student. | | | | | | | | | | | | | |
|--|---|---|-----------|------------|----------|-------|------------|------------|--------------------------|-----------|-------------|------------|-----------------|-----------------------------------|
| ÷ | ← RETURN ■ SAVE CHANGES ■ DELETE | | | | | | | | | | | | | |
| Make Sale/Post Fees Payment/Credit Returd Statement Add Student Add Contact Archive Family Family Name Email Schedules Submit Absences Merge Family Merge Family | | | | | | | | | | | | | | |
| Sumr | Summary Contacts Classes Events Transactions Billing Info Misc Notes (0) Resources (0) Policies (0) | | | | | | | | | | | | | |
| View | View Transaction History View Unapplied Credits & Unpaid Fees | | | | | | | | | | | | | |
| Curre | Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNPAID FEE UNPAPPLIED CREDIT | | | | | | | | | | | | | |
| | | | | | | | | Last 20 (M | ost Recent) Transactions | | | | | |
| | | | | | | | | | | | | | | |
| | | | Date | Туре | Orig Amt | Amt | Unpaid Amt | Balance | Note | Date Paid | Sess | Student | Class/Event | User |
| ø | 1 | ø | 2/15/2022 | Event Fees | 95.00 | 95.00 | 95.00 | 190.00 | | | Winter 2022 | David Ager | Aerial Workshop | Portal - hollyager41@gmail.com |
| 1 | 1 | S | 2/15/2022 | Event Fees | 95.00 | 95.00 | 95.00 | 95.00 | | | Winter 2022 | Dani Ager | Aerial Workshop | Portal - hollyager41@gmail.com |

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

I Frequently Asked Questions

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.

| Family A | very | | | | | | | | | | | | | |
|---------------------|-------------|------------|---------------|------------------|--------|-------------|----------------|--------------|--------|-----------------|--------|----------------|----------|--------|
| ← RETURN | SAVE CH | NGES | DELETE | | | | | | | | | | | |
| Make Sale/Post Fees | Payment/Cre | dit Refu | ind Statement | Add S | tudent | Add Contact | Archive Family | Family Na | me l | Email Email Sch | edules | Submit Absence | es Merge | Family |
| ummary Contact | s Classes | Events | Transactions | Billing Info | Misc | Notes (0) | Resources (0) | Policies (4) | | | | | | |
| | | | | | | Enro | ollment | | | | | | | |
| /iew 1 - 3 of 3 | a F | rint ø | Refresh | | | | | | | | | | | |
| Student | | Event Ty | pe | Date | | Time | Room | | Fee | Enroll Date | | Ву | | |
| | | Birthday P | Party. | <u>1/13/2024</u> | 2:30 | pm-4:30pm | | : | 250.00 | 1/3/2024 | | Iwallace | Transfer | 1 |
| Georgia Avery | E | arents Nig | ht Out | 1/12/2024 | 5:00p | om-10:00pm | | | 25.00 | 1/3/2024 | | Iwallace | Transfer | 1 |
| Adriano Avery | P | arents Nig | ht Out | 1/12/2024 | 5:00n | om-10:00pm | | | 25.00 | 1/3/2024 | | Iwallace | Transfer | - |

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.

| Show Details Openings (1 Less details - |
|---|
| |
| |
| Dianne Harris |
| |
| Save |
| |

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.

| Search Criteria Q Favorites Save Favorites X | Refresh ? |
|--|--|
| | all students enrolled across all events matching the criteria below. To produce a sheet for a single o print a sheet for all students enrolled in Events of a specific Category 1, select a Category 1 value. |
| Event Location | Room V |
| Enrolled in Category1 | τ |
| Event Type Event Date From | Dance Fever Birthday (EDU) Namaste Birthday Party (EDU) Parent's Night Out (EDU) Select one or more classes by holding the CTRL key 2/22/2020 iii Through Date mm/dd/yyyy iii |
| Display Settings | |
| Sub-heading | Saturday, February 22, 2020 |
| Show Home Phone | Yes Yes Yes Yes Yes Yes Yes Yes |
| Show columns for Staff Sign In/Out | No V ? |
| Separate Sign In/Out Sheet for Each Event | No • |
| Sort in Event Start Time Order | No • Submit |

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

| Si | Sign In/Out Sheet (Events) | | | | | | | | | | | |
|-----|--|----------|---------------|---------------|--------------|--|-----------|---|-----------|--|--|--|
| • | ← RETURN | | | | | | | | | | | |
| Vie | View 1 - 6 of 6 Print Export φ Refresh 1 columns hidden Show/Hide Columns P Restore Columns | | | | | | | | | | | |
| | Family/Account | Lastname | Firstname 🗢 1 | Home Phone | e Time In | | Signature | | Signature | | | |
| | Search | Search | Search | Search | | | | | | | | |
| 1 | Owers | Owers | Ashlee | (704) 555-772 | 721: | | | : | | | | |
| 2 | <u>Ager</u> | Ager | Barbie | (704) 374-24: | 15: | | | | | | | |
| 3 | Zackmann | Zackmann | Cindy | (704) 555-49 | 54: | | | | | | | |
| 4 | Harding | Harding | Coreen | (704) 555-468 | 35: | | | | | | | |
| 5 | Unger | Unger | Olivia | (704) 555-342 | 20: | | | | | | | |
| 6 | Evans | Evans | Shawna | (704) 555-547 | 78: | | | | | | | |

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 | Total | Points | Points | Points |
|-----------|----------|------------|-----------|-----------|
| of | Possible | Needed for | Needed | Needed |
| Questions | Points | an "A" | for a "B" | 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