Lesson #9 - Parent (Customer) Portal - The Basics

The Parent Portal - An Overview

The Jackrabbit Parent Portal is a wonderful tool that allows your existing customers to manage their account with you online, at any time of day! You control what features are available inside your Portal.

Add a link to your Parent Portal on your website, share it on Facebook, or send the link out to your families in an email for them to bookmark.

Depending on the **Parent Portal settings** you select, existing customers can:

- ⭐ Enroll students into classes and events
- ⭐ Schedule absences and makeups
- ⭐ Access class resources such as videos and PDFs
- ⭐ View the fees and payments posted to their account
- ⭐ Make online account payments
- ⭐ Update their contact information
- ⭐ Upload student photos
- ⭐ See news updates that you post
- ⭐ See and read past sent emails, registrations, and texts (if your organization uses texting)

Contacts with a valid email address in your main database can access the Parent Portal unless you specifically block them.

Families located in your Lead File do not have access to the Parent Portal.

To look around inside a "demo" sample portal that we have set up, go to this **Parent Portal DEMO** login page.

Use Login ID: mbestie@example.com
Use Password: BestTraining1

Remember, the information shown inside your own organization's Portal is controlled by YOU using the

settings in your database and may be different than what our Demo portal highlights.

🔽 Frequently Asked Questions

To start using this great feature see **Get Started with the Parent Portal**.

Introduce Your Parent Portal / Instructional Video

🔽 Portal Instructional Video

🔽 Introduce Your New Parent Portal

🔽 To ensure that your parents are able to log into their Portals, confirm the following:

Parent Portal - Your Customers' First Log In

Your families log into their Portals using their email address as their Login ID. They must select a password for their Login ID. There are a few ways a parent can get a Portal password.

🔽 During Online Registration

🔽 Reset Password Link on Login Page

🔽 Reset Portal Password Button on the Contact Record

Use the Parent Portal Log to View Portal Activity

Found in the *Family Reports* (from the *Families* menu), the **Parent Portal Log** allows you to quickly see all activity in your Parent Portal over a specified date range.

⭐ Troubleshoot for parents who might be attempting to log in to Jackrabbit with the incorrect password.

⭐ Search for a specific activity in a parent's portal, such as updating a student's date of birth.

⭐ Monitor absences and makeups that have been scheduled by parents in their portals.

Parent Portal Log

← RETURN

Date/Time (Local)	Family/Acct	Contact	Portal User ID	Contact Email	Message
11/9/2023 3:13:00 PM	Brown	Gabby Brown	gbarrett@email.com	gbarrett@email.com	Login successful for UserID: gbarrett@email.com
11/9/2023 3:12:00 PM	Brown	Gabby Brown	gbarrett@email.com	gbarrett@email.com	Incorrect Password for UserID: gbarrett@email.com
11/9/2023 3:12:00 PM	Brown	Gabby Brown	gbarrett@email.com	gbarrett@email.com	Incorrect Password for UserID: gbarrett@email.com
11/9/2023 3:11:00 PM	Gunnar	Deanne Gunnar	dgunnar@email.com	dgunnar@email.com	Agreed to Policies: Deanne Gunnar
11/9/2023 3:11:00 PM	Gunnar	Deanne Gunnar	dgunnar@email.com	dgunnar@email.com	Account: Gunnar Amount: 115.95 Response Code: Approved
11/9/2023 3:11:00 PM	Gunnar	Deanne Gunnar	dgunnar@email.com	dgunnar@email.com	Billing information changed: Credit card added; Last 4: 0008
11/9/2023 3:09:00 PM	Gunnar	Deanne Gunnar	dgunnar@email.com	dgunnar@email.com	Login successful for UserID: dgunnar@email.com
11/9/2023 3:01:00 PM	Ager	Holly Ager	hollyager41@gmail.com	hollyager41@gmail.com	Registered for Event: Aerial Workshops - Date/Time: 11/11/2023
11/9/2023 2:57:00 PM	Ager	Holly Ager	hollyager41@gmail.com	hollyager41@gmail.com	Birthdate for Barbie Ager set to 11/17/2010
11/9/2023 2:52:00 PM	Ager	Holly Ager	hollyager41@gmail.com	hollyager41@gmail.com	Login successful for UserID: hollyager41@gmail.com

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⊙ Search Criteria

⊙ Report Results

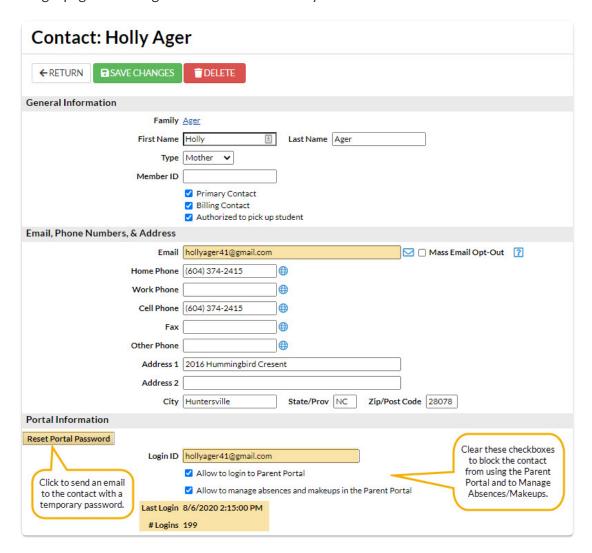# Parent Portal Information on the Contact Page

At the bottom of the *Contact* page you can view Parent Portal information including the following:

- Login ID.
- Number of times a parent logged into the portal .
- Last login date.
- You can also reset the contact's portal password using the **Reset Portal Password** button. This will generate a temporary password and immediately email it to the contact's email.
- Check boxes to allow portal access and manage absences/makeups.

ⓘ

Parents can reset their own passwords with the **Reset Password** link that is located on the Portal

login page. Encourage them to do this so that your staff does not need to reset it.

Test Access to Your Parents' Portals

In order to troubleshoot for a parent who is not able to log into their Parent Portal, the first step is to test whether or not you are able to log into their portal.

You can easily gain access to a parent's portal by temporarily adding yourself as a contact to that family. You can then generate a password and log in for yourself.

1. Click **Add Contact** in the *Family* record. Add your own name and your own email address as a contact for this family account.
2. Click **Save Changes**.
3. Select the **Reset Portal Password** button.
    - The temporary password that is generated is displayed in a screen confirmation and emailed. Copy the password.

4. Go to the **Gear** icon > **Settings** > **Parent Portal** > use the **Go to Parent Portal** link to log in using the password you copied. You will then be inside that family's portal. *Note:* Be sure you do not agree to Policies when you are testing access to the Parent Portal.

When you are finished, remember to delete your testing contact from that family record.

If you are able to log in, but the parent cannot access their portal this way, then there is something on the parent's side that is not working.

If You Can Access Their Portal but They Can't

Ask the customer the following questions:

- Is the contact email address correct?
- Ask them to add app.jackrabbitclass.com to their list of secured sites from within their internet browser. This is typically found in the browser Tools > Internet Options > Security.
- What internet browser are they using? (It should be the most recent version of Chrome, Microsoft Edge, or Firefox. If their version is old, please ask them to update it.)
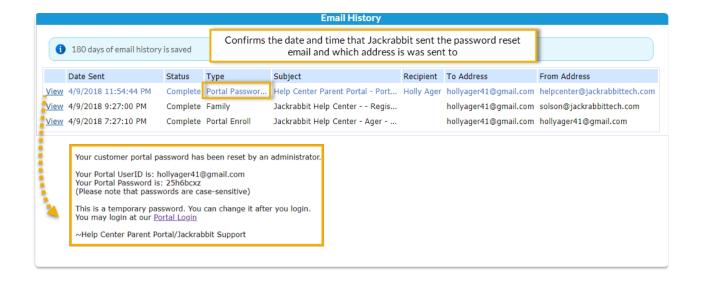
Something Else to Check

Another condition that can cause portal login errors is the manner in which your portal is connected to your website. If it is embedded, it can cause "session timed out" issues as well as many other problems.

Instead, make sure the portal is a link from your web page, not embedded directly into it. See the green box at the bottom of the **Link to Your Parent Portal** page for complete details.

Parent Portal Password Reset Issues

If a parent advises you that they are not receiving a password reset email, you can verify that it was sent by viewing the email history on the *Misc* tab of the *Family* record.

Click the **View Sent Emails** button and look for emails with the Type=Portal Password. These will confirm that the password resets were sent. You can even view a copy of the sent email.

Multiple Incorrect Parent Portal Password Attempts

If a parent attempts to log into their Portal using an incorrect password five times, all subsequent attempts will be blocked, even if the correct password is then used. Access to their Portal will be suspended and they will continue to receive the Invalid user ID /password combination error until they reset their password.

They can use the **reset your password** link in the login error window to generate a password reset email. Alternatively, you can reset it for them from their *Contact* record in the *Family* account. Click the **Reset Portal Password** link to generate a temporary password which will display briefly and also will be emailed to the parent.

Legal Policies and the Parent Portal

The Parent Portal is a great way for your customers to agree to your legal policies or renew their agreement to your current policies. With customers agreeing to policies online, you have the ability to access the last agreement date for each family, as well as a copy of the agreement with the date and time stamp. This eliminates the need to keep paper-signed agreements!

Jackrabbit captures your customer's agreement and stores it. *Note:* Registration information is stored in Jackrabbit for up to 5 years. There is a fee to retrieve records older than 5 years.

Having your customers renew their agreements at least annually and more if needed is recommended. This ensures you have current e-signatures on file to fulfill the requirements of the **Electronic Signatures in Global and National Commerce Act (E-Sign Act)**, which recognizes consent in the form of digital approval.

To create or manage your policies go to the *Gear (icon) > Settings > Policies (tab)*. See our Help article **Legal Policies & Policy Groups** for more information.

Whenever a **NEW** customer registers online coming in via the Online Registration Form, your current legal policies are displayed at the bottom of the registration form and they **must** agree to each one by checking the boxes and typing their full name, which Jackrabbit stores in the *Family* record > *Policies* (tab) for easy access.

⊙ Agree to Policy Agreements

⊙ View Policy Agreements

⊙ Send Families an Email Request to Agree to Policies

| Expand/Collapse All |

QUIZ - Lesson #9 - Parent (Customer) Portal - The Basics

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #9 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 #9 - The Parent (Customer) Portal - The Basics

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"

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

⌄ Return to Front Desk Staff Menu

⌄ Click here to provide feedback for this lesson