

# Protect Your Account - Guidelines for User Permissions

A great way to protect your business data and confidential financial information is to be sure all **Users** have the right user **permissions**. Having the right permissions allows each User to access the parts of Jackrabbit they need to perform their tasks successfully.

Almost every permission will be checked off and activated when Jackrabbit first sets up a new account. This initial User ID is intended to be the account **System Administrator**. Once the System Administrator User ID has been completed, they can create additional User IDs as needed.



Create a template for different User ID staff roles. Once a template is created, you can select the template in the User ID column under *Manage Users* and click the **Clone User** button to duplicate a User ID and create a new User ID with the same permissions. This saves lots of time and you won't have to select the permissions each time.

We have indicated which User permissions are related to the following in the tables below:

- **Financial information** - Credit card information, transactions, family balances, fees, and credits/payments fall into this category.
- **Areas of caution** - These permissions are sensitive and may not be appropriate for general staff access.
- **Areas requiring extreme caution** - Deleting data, classes, events, students, and leads. These permissions can significantly affect your account and should be assigned to the appropriate administrator.

**NOTE:** Permissions without a check mark must be checked off manually once a User ID is created. Contact the Support Team if you need help with User permissions.

---

**Legend:** Financial Information Use Caution Use Extreme Caution Financial Info & Use Caution

Expand each section to view the permissions by category and see what the permission controls.

⌵ **General**

⌵ **Families**

⌵ **Students**

⌵ **Classes**

⌵ **Events**

Expand/Collapse  
All

☑ EVENTS

☑ Staff

☑ Transactions

☑ Store

☑ Reports

☑ Tools

☑ Partners

☑ Staff Portal

☑ Automation

---