

Set Up Your Parent Portal

Last Modified on 01/14/2022 3:50 pm EST

Parent Portal Settings are divided into several sections. You can customize the information your families can access, and the functions you will allow them to perform. As you go through the sections, make selections by checking the boxes and **saving changes**.

Go to *Gear (icon) > Settings > Parent Portal* and follow the instructions in this article to help you set up your Parent Portal.



Be confident that your Parent Portal is set up exactly the way you want using [Preview Parent Portal](#).

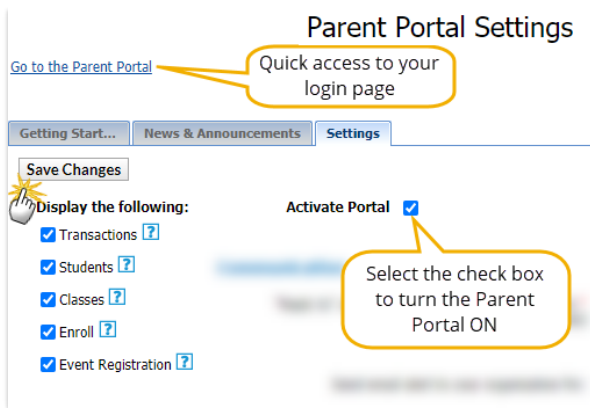
Expand each section below to see the details for setting up your Parent Portal.

[Expand/Collapse All](#)

Display Settings

Click *Go to the Parent Portal* quick link to access the portal login page. Be sure **Activate Portal** check box is checked, this activates the Parent Portal access and will automatically add a link *Already a customer? Click here to login* to the top of your Online Registration form too!

These settings control what your families will be able to see when they are logged into their Portals.



Transactions	<p>Controls what is displayed on the <i>Billing & Payments</i> page. When selected, recent account activity is displayed and the parent has an option to generate a transaction history which they can sort or filter.</p>
Students	<p>Controls whether the <i>Students</i> section is available under <i>Account</i>. When selected, the parent is able to see a 'card' for each student with summary information and a photo of the student if it has been added to your database. They will be able to click the card(s) to view more detailed information about the student(s). In addition, students can be added to the <i>Students</i> section.</p>
Classes	<p>Controls <i>My Schedule</i> on the <i>Dashboard</i> and <i>Enrollment</i> on the <i>Student</i> page. When selected, <i>My Schedule</i> will display on the <i>Dashboard</i> and an <i>Enrollment</i> option will be available on the <i>Student</i> page. Both will display information about the class(es) the student(s) are currently enrolled in and any waitlist classes.</p>
Enroll	<p>When enabled, the <i>Enroll</i> menu option will allow the parent to search for classes by going to <i>Classes & Events > Find Classes</i> button. If you opt to not allow student enrollment in the Portal the parent will be able to view the class information and will see a message that prompts them to contact you directly to enroll in classes.</p>
Event Registration	<p>Controls the ability to enroll in an Event. When selected, the <i>Classes</i> menu option becomes <i>Classes & Events</i>, and <i>Find Events</i> option is available. Parents are able to view and enroll either their students or the family, in an Event.</p>

Communication Settings

These settings control your email communications, Login Message, and allows the Parent Portal video to display on the login page.

Communication

"Reply to" and "Send Alert to" Email Address(es):*
(email; email2)

(For portal emails to be sent to location email instead, go to the Gear Icon > Settings > Online Registration > Settings and set the 'Use location email if available' to 'yes')

Send email alert to your organization for: Updates to Policies [?](#)
 Updates to Payment Method
 Student Enrollments

Send email alert to parent for: Student Enrollments

Show Class Dates in Email Confirmation

Show Category 1 in Email Confirmation

Login Page Message:
(max 500 characters)

Welcome to your Help Center Parent Portal

Show link to Portal video on Login Page? [Click here](#) to preview video.

Portal Video Message:
(max 500 characters)

New to our Portal? Watch this quick video to see how to access and manage your account with us.

<p>"Reply to" and "Send Alert" to Email Address(es)</p>	<p>Provide the email address where you want to receive notifications, enrollments, payments, etc. This will also show as the "from" address when customers receive their email notifications.</p> <p>If you prefer the portal emails be sent to the Location email instead, use the Gear (icon) > Settings > Online Registration > Settings > Email Confirmation Settings and set Use location email address if available to Yes.</p>
<p>Send email alert to your organization for</p>	<p>Select which Parent Portal activities you would like to receive an email alert for - Updates to Policies, Updates to Payment Method, and/or Student Enrollments.</p>
<p>Send email alert to parent for</p>	<p>Select the check box to send an email to the parent's email address on file when a student is enrolled in a class.</p> <p>Optionally:</p> <ul style="list-style-type: none"> • Show Class Dates in Email Confirmation When set to Yes, the Class Start and End dates will be included in the email. Set this to No if you use perpetual classes. • Show Category 1 in Email Confirmation This setting defaults to No. If you would like to include the Category 1 value of the class in the email confirmation, set this to Yes.

Login Page Message	Text entered here (500 characters max) is displayed in a window that is seen by all Portal users. It appears on the Parent Portal login page before the parent is able to log in. This is a great place to add a welcome message or to add information that you want to broadcast to everyone. This text box supports HTML.
Show link to Portal video on Login Page	When selected, a <i>Watch Video</i> link will be available for your parents to watch a quick (3:03) instructional video on the Parent Portal. Refer to Introduce Your Parent Portal/Instructional Video for more information.
Portal Video Message	This text field is only available when the <i>Show link to Portal video on Login Page</i> is selected. Text (up to 500 characters) entered here will appear before the <i>Watch Video</i> link and can be used to bring attention to what the video offers.

Family Information Settings

This section determines what you will allow your parents to DO inside their Parent Portal.

Family / Student Information

Update Contact and Student Information Add Students

Update ePayment Schedule Show Student Skills

Update Membership Type Show Student Absences/Attendance

Hide School/Grade Fields Show Attendance Issues

Gender Can Update - Optional ▼

Can Update - Optional

Can Update - Required

Hidden

Select the *Gender* option that matches your company policy. The *Gender* option will not be displayed if *Hide Gender* is set to *Yes* in Organization Defaults.

Update Contact and Student Information	Controls the ability to update phone numbers, email, addresses, etc.
Update ePayment Schedule	Allows the parent to update the family's <i>ePayment Schedule</i> (located on the <i>Billing Info</i> tab of the family record).
Update Membership Type	Allows the parent to update the family's <i>Membership Type</i> (located on the <i>Billing Info</i> tab of the family record).

Hide School/Grade fields	Option to hide these fields in the student information.
Gender	Controls the options for student <i>Gender</i> selection. Select <i>Hidden</i> and the <i>Gender</i> option will not be displayed in the Parent Portal. Note: The gender option setting will not be shown if the <i>Organization Default > Student Settings</i> for <i>Hide Gender</i> is set to <i>Yes</i> .
Add Students	Allows the parent to add new student information in the portal.
Show Student Skills	If you track skills in Jackrabbit, allow your parents to see the skills and instructor notes on each Student's page.
Show Student Absences/Attendance	Controls whether or not the Absence or Attendance tab is available in the student record in the portal.
Show Attendance Issues	Attendance Issues are when a student has been marked Present and additional details have been added (Late, Left Early, Observing). You can choose to show this information to parents in the Parent Portal or hide it.

Family and Student User Defined Fields

Define which of your custom *User Defined Fields* are able to be seen and edited in the portal. User-defined Fields are customized from *Gear (icon) > Settings > General > User-defined Fields* and can be used on the Online Registration Form as well as shown inside the Portal. The responses entered in the Parent Portal are shown on the *Misc* tab of the *Family* and *Student* records.

Family User Defined Fields [?](#)

Family field1: Enter Coupon #	Can Update - Optional ▼
Family field2: <-blank->	Hidden ▼
Family field3: <-blank->	Hidden ▼
Family field4: <-blank->	Hidden ▼
Family field5: <-blank->	Hidden ▼

Student User Defined Fields [?](#)

Student field1: Photo Release (Y/N)?	Hidden ▼
Student field2: Recital Participate (Y/N)?	Can Update - Optional ▼
Student field3: <-blank->	Hidden ▼
Student field4: <-blank->	Hidden ▼
Student field5: <-blank->	Hidden ▼

These settings control how the fields are used in the Parent Portal.

Family and Student User Defined fields are customized from *Gear (icon) > Settings > General > User-defined Fields.*



To run a report of all recent changes to these fields that were made in the Parent Portal, go to **Reports (menu) > Find Reports > Families/Students (left menu) > Recommended (tab) > Parent/Customer Portal Log**. Enter a date range and filter for *User Defined Field Changes*.

Fees & Payments Settings

These options control which transaction details are displayed for a transaction in the transaction history in the *Billing & Payments* section of the Parent Portal.

Fees & Payments

- Show Transaction SubType:
- Show Session:
- Show Payment Method:
- Show Check Number:
- Show Discounts:
- Show Tax:
- Show Unpaid Amount:
- Show Balance:
- Show Transaction ID:

← BACK TO BILLING

Transaction History

PRINT

TRANSACTIONS
2

SORT BY
DATE: NEWEST FIRST

FILTER RESULTS
ADD A FILTER

Transaction Type	Date	Amount	Tax	Balance
Payment	10/29/2021	100.00	0.00	0.00
Tuition Fee	10/01/2021	100.00	0.00	100.00

PAYMENT POSTED 10/29/2021

✓ Thank You

CREDIT CARD ENDING IN 9906

100.00 123456 34581789
AMOUNT CONFIRMATION # TRANS ID

OK

TUITION FEE POSTED 10/01/2021

FEE SUBTYPE	CLASS	SESSION	STUDENT
Oct	Ballet - Beg - W	2021	Dani Ager

Subtotal	120.00
Discount	-20.00
Total	100.00
Unpaid Amount	0.00
Trans ID	34543595

OK

My Classes Settings

These settings control what information is displayed in the class 'cards' seen in *My Schedule* (Dashboard) and when you view the student, under *Enrollment*. If a student is on a waitlist for a class, the class will be shown below the enrolled Classes.

My Classes

- Show Instructor Nickname: Yes 1
- Show Student Start Date: Yes 2
- Show Student Drop Date: Yes 3
- Show Class Start and End Dates: Yes 4
- Show Category 1 Value: Yes 5



BARBIE [VIEW BARBIE](#)

CLASSES (1)

Ballet - Beg - F

5:00pm - 6:00pm

M T W T **F** S S

Main

5 Ballet

1 with Ms. Livy

CLASS STARTS 4 CLASS ENDS
01/01/2021 12/31/2021

2 STUDENT STARTS STUDENT DROPS 3
09/03/2021 -

[VIEW RESOURCES](#)

[VIEW DETAILS](#)

Show Instructor Nickname	To have the Public Nickname field of an instructor's Staff record display in the class 'cards' in the Parent Portal, set <i>Show Instructor Nickname</i> to Yes. When set to No, no information about the instructor will display.
Show Student Start Date	Typically this is the student's enroll date. However, if the class hasn't started, the class start date will be shown instead of the student's enroll date.
Show Student Drop Date	If a Future Drop has been scheduled for a student you can choose to display it.
Show Class Start and End Dates	The date that a class starts and finishes, as defined on the <i>Summary</i> tab of the <i>Class</i> record, will display if this is selected.

Show Category 1 Value

When set to Yes, the Category 1 value on the class will be displayed in the Parent Portal on all schedule pages.

Class Enrollment Settings

Class Enrollment Settings

- Enroll Students
- Hide Instructor Filter
- Allow enrollment at any location
- Prevent Inactive Families from enrolling
- Prevent Problem Families from enrolling
- Require policy agreement for each enrollment
- Hide Category 1 Filter
- Hide Category 2 Filter
- Hide Category 3 Filter
- Hide Day Filter
- Show Class Start Date
- Show Instructor Nickname
- Show Category 1 Value

Class Enrollment Openings

Enrollment Comment Label Required:

The Age Filtering setting can be found under the Gear Icon in Settings > Online Registration. This setting prevents students, who are not within a class's age range, from enrolling into that class.

Inactive Family Enrollment Message:
(max 500 characters)

Only families/accounts that have a student currently enrolled may register for a class. Please contact us with any questions.

Enroll Students	Select to allow parents to enroll students in classes and events in the Portal.
Hide Instructor Filter	Allows you to hide the option to filter classes by an instructor in the <i>Find Classes</i> class listings filter drop-down.
Allow enrollment at any location	Select if you have multiple Loc (location) codes and will allow families from one location to enroll in classes and events in a different location.
Prevent Inactive Families from enrolling	Select to prevent inactive families (no actively enrolled students) from enrolling in classes.
Prevent Problem Families from enrolling	Select if you want to prevent families that are flagged as problem accounts from enrolling.
Require policy agreement for each enrollment	If you want your policies re-agreed to EACH TIME someone enrolls, select this check box.

Class Enrollment Openings	Show the number of openings in the class or hide the count from the class listings. Openings for classes that are nearly full are highlighted in orange. If you will be using online Waitlisting, we recommend that you do not hide the Openings column.
Enrollment Comment Label	Use this text field to ask a custom question during enrollment. The answer will appear in the email notification you receive. It will also be archived in the Portal enrollment. Define whether this is required or not.
Inactive Family Enrollment Message	ONLY use this when you have also selected the 'Prevent Inactive Families from enrolling' above. Text (500 characters max) entered here will display to an inactive family if they attempt to enroll. This message should indicate why are you currently blocking Inactive families from enrolling.

On the right are settings that control the listing of classes in the Parent Portal.

Hide Category 1 Filter

Hide Category 2 Filter

Hide Category 3 Filter

Hide Day Filter

Show Class Start Date

Show Instructor Nickname

Show Category 1 Value

Control the parents' ability to filter the listing of classes and narrow down their search by hiding or showing the Category filters and the Day filter. The actual columns will still be shown, this only takes away the filtering ability. Select a check box to hide a filter and parents will not be able to narrow down the class listings using that filter.

Choose whether or not to show the *Class Start Date*, *Instructor Nickname*, and/or *Category 1 Value* in the listing of classes.

CLASSES 9

SORT BY CLASS: A - Z

FILTER RESULTS ADD A FILTER

Click X to remove the applied filters.

Controlled by the Show Instructor Nickname setting.

Add filters for results here.

CLASS	FOR	SESSION /START	WHEN	WHERE	WITH	TUITION
2 SPOTS LEFT! Artistic Gymnastics L3 - Thurs 7pm	Male & Female At least 13	Winter 2019 12/01/2019	7:00pm - 8:00pm [M] [T] [W] [T] [F] [S] [S]	Jackrabbit Support	Ms. Dianne	85.00
8 SPOTS LEFT! Ballet L1 - Tues 6pm	Male & Female At least 5	Winter 2019 12/01/2019	6:00pm - 6:30pm [M] [T] [W] [T] [F] [S] [S]	Jackrabbit Education	Coach Stephanie	45.00
7 SPOTS LEFT! Class in Concord	Male & Female All Ages	Winter 2019 12/01/2019	6:00pm - 7:00pm [M] [T] [W] [T] [F] [S] [S]	Concord	Ms. Dianne	100.00

Filter results by:

- TYPE
- LEVEL
- CATEGORY 3
- SESSION
- GENDER
- AGE
- START DATE
- TIME OF DAY
- DAYS OF THE WEEK
- LOCATION

Tips regarding filters

- You can change the Category labels to words that are more descriptive to your parents. For example, you can rename Category 1 to "Program" or "Type". Go to the **Gear (icon) > Settings > Online Registration** and scroll down to the *Class Search Settings > Class Search/Filter Settings* section. (This affects *both* the Portal *and* Registration Form display).
- You can eliminate certain Categories from the drop-down selection list. For example, you may have a Category 1 called "Costume Fees" that you use for revenue reporting only and don't want your parents to see this in the Portal. To prevent non-applicable Categories from being listed as a choice in the drop-down filter list, go to the **Gear (icon) > Settings > General > Drop-down Lists (left menu) > Category 1 (or 2 or 3)**, and check the Hide from customers check box by any Category that you do not want to appear as a filter selection (this affects *both* the Portal *and* Registration Form display).
- The gender filter will not be shown if the *Organization Default > Student Settings* for *Hide Gender* is set to Yes.

Accepting Donations

Jackrabbit offers the ability to collect charitable donations from your families in the parent portal and allows you to set the donation amounts.

Accepting Donations

Would you like to accept donations on behalf of a charity?

Select charity*

See our Help Center article [Accept Charitable Donations in Jackrabbit](#) for setup instructions and more details.