Accept Charitable Donations in Jackrabbit

Last Modified on 02/25/2025 4:47 pm EST

Jackrabbit offers your organization the ability to select a charity and collect donations from families in the Parent Portal.

- Use the Store feature to set up the charity you have selected.
- Set donation amounts in unlimited increments.
- Donations are easily collected in the Parent Portal.
- Reporting provides you with the donation amounts, and you simply send a check to the designated charity when it's convenient for you.

> We recommend downloading, printing, and reviewing the **Managing Charitable Donations with Jackrabbit** checklist.

Getting Set Up to Accept Donations

Follow these steps to get Jackrabbit set up to accept charitable donations using the Store feature.

Expand/Collapse All

Step 1 - Create a Vendor for the Charity

Once a vendor is defined as a charity, it will be added to the drop-down list in the *Accepting Donations* Parent Portal setting (see Step 4 below). The charity selected from that drop-down list is added to the ♥ Give page in the Parent Portal.

1. Go to the **Store** (menu) > **Item Vendors** and click **Add Vendor.**
2. Enter the charity's name as the **Vendor Name** and create a **Vendor ID**.
3. Enter the charity's tax identification number, set the **Charity** drop-down to *Yes*, and select whether or not the charity is **Tax Exempt**.
4. Complete the contact and address information.
5. Enter details in the **Notes** section.
    - The text entered here will display on the ♥ Give page in the Parent Portal.
    - We recommend you add a website link to the charity so your families can learn more about them.
    - Consider adding the charity Tax ID for tax purposes.
6. Click **Save**.

Step 2 - Create a Transaction Type for Donations

The **Transaction Type** appears in several places (on the *Transactions* tab of the *Family* record, in the transaction history in the Parent Portal, etc.) and helps to identify donation transactions.

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu). Scroll down to the **Transaction** section and select **Transaction Types** (left).
2. Click **Add Row**, add the label for the transaction, e.g., "Donation," and select **Debit** from the drop-down list.
3. Click **Save Changes**. When you refresh the page, the new Transaction Type will appear in the list alphabetically.

Step 3 - Add an Item for Each Donation Amount

Items created with Category 1 = *Charitable Donations*, and a Vendor that has been designated as a charity (Step 1), will be added to the ♥ Give page in the Parent Portal. For each item, a button displays labeled "Give #" where the # is the Item Price. Parents will select a button for the donation amount they want to give.

Note: The Charitable Donations CAT1 value is added automatically by Jackrabbit and is a reserved value (can't be edited/deleted).

1. Go to the **Store** (menu) > **Add Item**.
2. Create an **Item #/Barcode** for the donation.
3. Add an **Item Name**; this appears as a note on itemized receipts, statements, and on the *Transactions* tab of the *Family* record.
4. Set *Track Qty on Hand* to **No** since this is a non-inventory item. Optionally add a *Description* and a *Status* for the donation item.
5. Add the **Item Price**; this is the amount that will display in the Parent Portal on the ♥ Give page. Set *Item Tax* to **No Tax**.
6. Select **Charitable Donations** from the *Category 1* drop-down. Select the *Transaction Type* added in Step 2 and optionally add a *Transaction Sub-Type*.
7. Select the charity for the donation from the *Vendor* drop-down.
8. Click **Save & Add Another Item** to add additional donation amounts or **Save Changes** when done.
    - There is no limit to the number of donation amounts you can add.

Step 4 - Enable Donations in the Parent Portal Settings

When **Accepting Donations** is set to *Yes*, the selected charity will be added to the ♥ Give page in the Parent Portal.

1. Go to the **Gear** (icon) > **Settings** > **Parent Portal** > **Settings** (tab).
2. Scroll down to the **Accepting Donations** section.

3. Set *Would you like to accept donations on behalf of a charity?* to **Yes**.
4. Choose the charity from the *Select charity* drop-down list, and this selection will be added to the ♥ Give page in the Parent Portal.

Don't forget Jackrabbit allows you to collect charitable donations; however, you control how and when to send the donated funds to the charity.

Collect Charitable Donations in the Parent Portal

Once you have completed the Store setup steps outlined above, your families will see the ♥ *Give* option in their Parent Portal when they log in.

Expand/Collapse All

Donation Process in the Parent Portal

Although you can create an unlimited number of donation dollar amounts, you are limited to collecting for one charity at a time in the Parent Portal. The table below outlines the donation process for families in the portal.

• On the ♥ *Give* page, parents will select the **Give #** button for the donation amount they want to make.	
Your organization must be signed up for **ePayments** to collect payment in the Parent Portal. When a donation is made in the Parent Portal, immediate payment by credit card is required.	

• The credit card authorization window opens, and the parent will be asked to enter and confirm their security code from the back of their card.	
• If the family does not have a credit card on file, they will see a notification that their card payment method is not set up. • They will need to either **add their credit card in the portal** or call your office to have the card added before they can make the donation in their portal.	
• Upon credit card approval, a confirmation will display the amount paid with a Transaction ID. • Email notification of the payment will be sent to your organization according to your **Notification Settings**. • The transaction is added to the *Family* record > *Transactions* tab.	

Parent Portal Transaction History

Families can see the donation transaction in their Parent Portal using the*Quicklink - Full Transaction History* under *Billing & Payments*.

Locate a Donation in the Family Record

Once the family has completed the steps to make a donation in the Parent Portal, your organization can locate the donation in the *Family* record > *Transactions* tab.

If a family requests a receipt, recommend they go to the portal, or you can go to the Family record to generate a receipt. Use the pencil icon to open the **Edit Transaction** window and click **Receipt** to print or email the family an itemized receipt for their tax records.

Sample Receipt

Reporting for Charitable Donations

It's quick and easy to run a report to determine the total amount collected for the charity you are collecting for. Either the **Paid Fees** and **Revenue Summary** reports can be generated to include or exclude charitable donations using the **Display Setting** *Show Charitable Donations.* The **Revenue Snapshot** report always displays Charitable Donations as separate line items.

Note: Accepting donations from a family on behalf of a charity may have legal or tax implications. You may want to check with an accountant or an attorney.

Expand/Collapse All

Paid Fees Summary & Revenue Summary Reports

In the body of these reports, donations are clearly identified, and the report's totals are broken out to distinguish between donations accepted and your revenue. This makes it easy to reconcile with your **Deposit Slip** report for the same period, which will always show the total amount of payments collected.

Revenue Snapshot Report

The **Revenue Snapshot** report, as a summary of all payments that reconcile to the Deposit Slip report, will always display charitable donations.

Depending on the volume of donations you collect, we recommend you run one of the reports *mentioned above monthly to determine the donation totals so you can send a check directly to the charity.*