Consistent Data Leads to Consistent Results

The data you enter in Jackrabbit directly affects what you get out of it. With multiple people working in one database, it's very important to prevent inconsistencies as much as possible. For example, Jackrabbit allows you to **customize drop-down lists** found throughout your database. It is not always apparent what values should be used when completing tasks. Keeping control of these values, how they are used, and when, is best managed by a designated **system administrator**.

Where Data Lives in Jackrabbit

Become familiar with data found on different pages. For example, the **Family record** houses transactions (fees and payments). Since transactions are associated with the family, you know where to locate information to edit.

Discuss the importance of complete and accurate information with your office staff. The more they understand, the better the results. There are many areas where data is entered, including, but not limited to:

Editing drop-down lists	**Adding and assigning skills**	**Adding families**
Adding staff	**Adding classes**	**Enrolling students**
Posting transactions	**Creating & selling store items**	

Check for Data Inconsistencies

Implement daily and weekly procedures to keep an eye on different areas of your database. It is much easier to find and fix inconsistencies within the same day or week instead of waiting until the month or year-end. It also presents a great learning opportunity for your staff while the scenario is still fresh in their mind!

Approve Staff Hours

If you are using Jackrabbit's **Time Clock** feature, you may find it beneficial to approve time entered on a weekly basis rather than at the end of the pay period. **Approving time** weekly helps you to:

- Identify and address concerns with time entries early on.
- "Lock-in" time entries so the entries cannot be edited at a later time.
- Save time in advance of the payroll deadline.

Check for Expired Credit Cards

Conduct an **All Families** search to see which customers have expired credit cards. This will address your customers' ability to pay their account balance prior to processing ePayments. You can **email families** with missing or expired credit cards using the pre-made template in your database. Add the **link to your Parent Portal** in the **email template**, allowing parents to easily log in and update the existing card or add a new card on file.

Clean Up Transactions

Fixing transactions in your database regularly ensures correct data. You can do this on a daily basis if you prefer, but we suggest doing this on a weekly basis, at the least. Transaction clean-up includes:

- Finding transactions that need to be linked.
- Linking **unapplied credits** (payments) to corresponding fees.

As you receive cash or check payments at the front desk, make sure you enter them immediately into Jackrabbit. You can **print a receipt** for your customer if needed.

Review the Executive Dashboard

The **Key Metrics** section of your Dashboard is a great place for you to see a snapshot of new registrations and enrollments. If you are in a slower period of registrations, you can do this weekly rather than daily.

Use the *Class Registrations to be processed in the last X days* link to process registrations from new families and enrollments from existing families, all in one place. It is important to verify all related fees have been posted (registration fee, tuition, etc). Depending on your settings, fees may post automatically. We recommend you review the **Process Class Registrations Report** article for more detailed information and instructions.

Check your Dashboard for **Classes with Incomplete Staff Portal Attendance**. You can add a message to the instructor's portal directly from here, asking them to complete attendance. If your database is set up for texting, you can also text them from this report!

Compare ePayment Transactions to Virtual Terminal

Jackrabbit initiates ePayments (Credit Card and Bank Draft payments) which flow through your **Virtual Terminal**. It is a good idea to make sure both sides match. Compare your ePayment transactions with your Virtual Terminal. Refer to **Bank Reconciliation When Using ePayments** for additional details.

Run Reports

Another recommendation is to spot-check data using *Reports (menu) > Find Reports.*

- If your office staff just created a new session of classes, run the **Classes Search** report. Make sure information is entered in applicable columns.
- If you accept cash at your facility, it is important to reconcile your cash drawer each day. Use the **Deposit Slip** report, filtered to only show cash, to ensure what is entered in Jackrabbit matches the cash on hand.
- The **Paid Fees** Report, showing detail, can help you find unapplied payments that can be linked to unpaid fees. Checking this report daily will help you **locate unapplied payments** quickly so they can be linked easily.
- Run an **Enroll History report** for the previous day to create a list of students who are newly enrolled. The results page allows you to email the students who are new to your program from the list.
- Run a **Drop History report** for the previous day to create a list of students who were dropped from classes. Make sure any related fees are removed from the family's account if needed.

Refer to **Reports in Jackrabbit** to get the most out of using these search reports.

Consistency is a must with data-driven software like Jackrabbit. Contact Support using the question mark ⑦ button in Jackrabbit for any additional questions!

Set **user permissions** for your office staff to cover what is needed for their daily tasks. Fewer hands in the pot will help with consistency!