

# Checklists for Success in Jackrabbit

Last Modified on 07/24/2025 4:15 pm EDT

We know you and your staff are busy taking care of business, trying to make sure everything gets done in a timely manner and done right! We've created these checklists (PDFs) to help you be successful along the way.

***After all, who doesn't love a checklist?***

## Getting Started Checklists

### **Start Up Checklist - Steps for Successful Set Up-**

Step-by-step instructions for setting up your Jackrabbit system are listed in this checklist. Everything from creating drop-down lists, adding classes, creating legal policies, the Parent Portal, and much more is covered in this checklist.

Just click the green question marks in the checklist to link to additional information.

### **Online Registration Form - Checklist for a Successful Rollout -**

All the tasks you need to set up your Online Registration form are included in this checklist. Hyperlinks are embedded in the checklist so you can link to Help Center articles related to Online Registration.

### **Parent Portal Setup - Checklist for a Successful Rollout-**

Existing families have the ability to manage their accounts online with the Parent Portal. Parents love the ease and convenience of having their account online, and you control the options for what they can see and do in the portal!

Use the links in the checklist to visit Help Center articles for setup and other suggestions.

### **Class Listings Tables - Checklist for a Successful Rollout-**

Display your class offerings in real-time on your website. The Class Listings Tables can be customized to allow enrollment directly from the table for both new and returning families.

The checklist links out to additional Help Center articles, including an overview of the Class Listings Tables and how to customize the tables with HTML code.

### **Online Events Calendar - Checklist for a Successful Rollout**

-

Take your events online with an integrated calendar offering registration online. Create a simple link, and add it to your website.

Review the checklist for all the information you need to put your events online.

### **Store Setup Checklist - Steps for a Successful Store Rollout -**

Things to consider and tasks to complete are outlined in this Store checklist. The checklist links out to additional Help Center articles with instructions and additional information.

## **Additional Checklists**

### **Daily/Weekly Checklists -**

Implementing a consistent routine helps you manage your Jackrabbit account more effectively. Here are some suggested daily and weekly procedures to help you stay "on top of things," including links to Time Clock articles.

### **Transition to a New Session of Classes -**

As you get closer to starting a new session and you still have a session in progress, this checklist will help make it a smooth transition.

Just follow the steps and optional tasks outlined in this checklist.

### **Registration & Enrollment Checklist -**

Recommendations for opening registration, ensuring student enrollments are correct, fees and payments are processed accurately, and communicating with families along the way.

Use the links in the checklist to visit Help Center articles for registration and enrollment.

### **End of Year Checklist -**

Use the rich reporting features in Jackrabbit to prepare for the year-end. Check revenue and enrollment to determine your business's financial health. Provide tax information for families and prepare for your business tax preparation.

Use the links in this checklist to review and clean up family balances, review end-of-year reports, and archive families to the lead file.

## **Not Exactly a Checklist**

### **4 Steps to Tuition Billing -**

It's not exactly a checklist, so let's call it a step-list! The 4 Steps to Tuition Billing steps out the process for posting tuition fees to families, checking tuition fees, finding and applying unapplied credits to fees, and how to process payments. And, of course, communicating with families before processing payments.

Each step in the checklist has links to Help Center articles with additional information to guarantee successful billing.

---

If you have questions about any information included in this Topic Hub, don't hesitate to contact us. Click on the [icon](#) in Jackrabbit to request assistance, or [click here](#) to book a call with one of our Support Specialists.

---

---