User-defined Fields

Family and Student User-defined Fields (UDF), 5 of each, are custom fields you create that allow you to capture and store additional important information to your organization. These are a few examples:
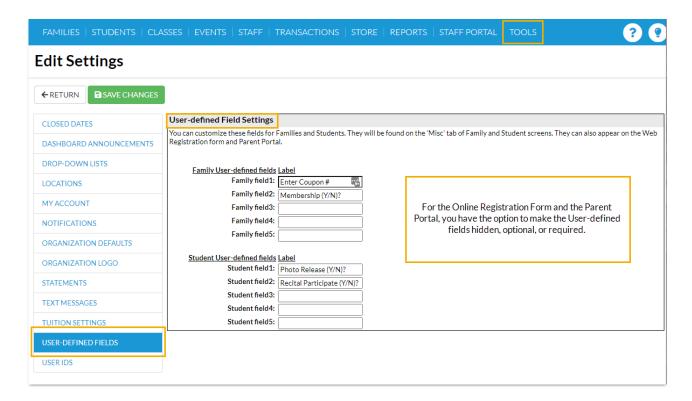
- ⭐ Parents agreement to allow you to use their child's photo in your promotional materials
- ⭐ Coupon numbers
- ⭐ Past skill achievements
- ⭐ Association membership numbers

Expand each section for more details on User-defined fields.

> Expand/Collapse All

Create User-Defined Fields

The *Family* and *Student* User-defined Fields are created and edited from the*Tools* menu > *Edit Settings > User-defined Fields.*
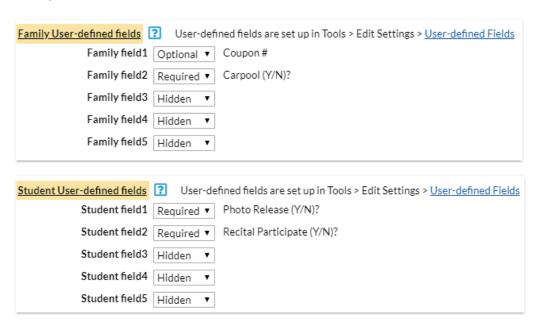
Online Registration Form Settings

On your **Online Registration** form, you can set a User-defined Field to:

- *Hidden* (field doesn't show on the registration form)
- *Optional* (field shows but the parent can leave it blank)
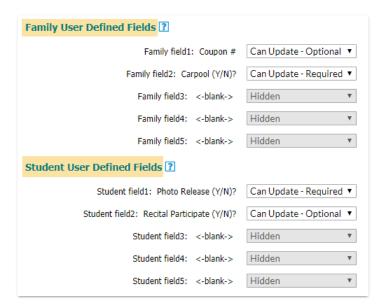- *Required* (parent must provide a response).

These settings are accessed from the *Tools* menu > *Online Web Registration* > *Field Options/Labels* in the *Family Information* and *Student Information* sections.

Parent Portal Settings

In the **Parent Portal**, you can set a User-defined Field to:

- *Hidden* (field will not appear in the portal)
- *View Only* (field will be visible in the portal but the parent cannot edit it)
- *Can Update - Optional* (field shows and the parent has the option to edit it)
- *Can Update - Required* (parent must complete the field).

These settings are accessed from the *Tools* menu > *Parent Portal* > *Settings* tab.

In the Parent Portal, making a User-defined Field required will notify the parent that they need to give you more information. A notification badge will appear in their portal indicating that additional information has been requested. *Note:* It does not prevent the parent from enrolling their student(s) in classes.
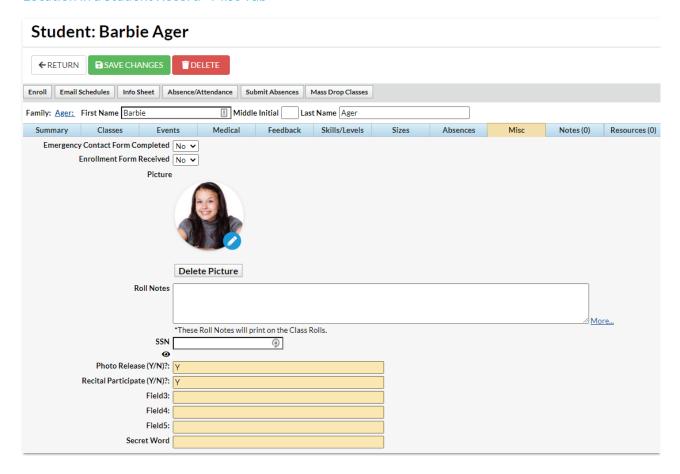
Locate UDF Answers

Location in a Family Record - Misc Tab

Answers to the Family User-defined Fields are saved and stored on the *Misc* tab of the *Family* record. These fields will also appear in several searches and reports throughout Jackrabbit.

Family: Ager

[SAVE CHANGES] [DELETE]

[Make Sale/Post Fees] [Payment/Credit] [Refund] [Statement] [Add Student] [Add Contact] [Archive Family] [Family Name] [Email] [Email Schedules] [Submit Absences] [Merge Family]

| Summary | Contacts | Classes | Events | Transactions | Billing Info | Misc | Notes (2) | Resources (2) |

[View Registrations] [View Sent Emails]

Contract Start Date [mm/dd/yyyy] 📅   Contract End Date [mm/dd/yyyy] 📅

Booster [No ▾]   Referral [No ▾]

Emergency Contact Form Completed [No ▾]   Enrollment Form Received [No ▾]

Notes [   ]   More...

Source [▾] (How they heard about us)   Referral Name [   ]

Prospect [No ▾] (Not automatically Updated)

Parent Portal Login Message [   ]   More...

Portal Message Expiration Date [mm/dd/yyyy] 📅 ❓

Last Policy Agreement Date 5/5/2020

Enter Coupon #: [   ]

Membership (Y/N)?: [Y   ]

Field3: [   ]

Field4: [   ]

Field5: [   ]

Location in a Student Record - Misc Tab

Student: Barbie Ager

[← RETURN] [SAVE CHANGES] [DELETE]

[Enroll] [Email Schedules] [Info Sheet] [Absence/Attendance] [Submit Absences] [Mass Drop Classes]

Family: Ager: First Name [Barbie   ]   Middle Initial [   ]   Last Name [Ager   ]

| Summary | Classes | Events | Medical | Feedback | Skills/Levels | Sizes | Absences | Misc | Notes (0) | Resources (0) |

Emergency Contact Form Completed [No ▾]

Enrollment Form Received [No ▾]

Picture

[Delete Picture]

Roll Notes [   ]   More...

*These Roll Notes will print on the Class Rolls.

SSN [   ] 🔒
👁

Photo Release (Y/N)?: [Y   ]

Recital Participate (Y/N)?: [Y   ]

Field3: [   ]

Field4: [   ]

Field5: [   ]

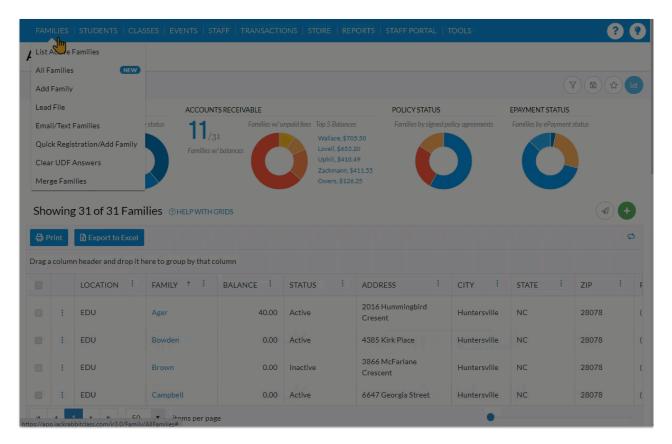Secret Word [   ]

Report on User-defined Fields

All Families List

Go to the *Families* (menu) > *All Families* to report on Family User-defined Fields. Filter for *Family User-Defined Fields*, enter the information in the selected field, click *Apply*, and the filtered list will populate on the page.

To display the column with the user-defined field information, use the column menu ⁝ and select the specific User-defined field column you would like to see on the list. For the example below, you would select *Membership (Y/N)*.

All Students List

Go to the *Students* (menu) > *All Students* to report on Student User-defined Fields. Filter for *User-Defined Fields*, enter the information in the selected field, click *Apply*, and the filtered list will populate on the page.

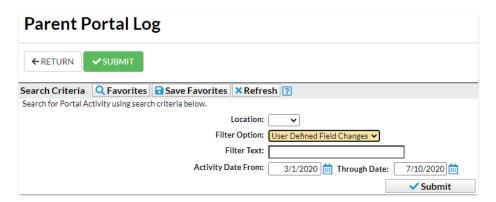To display the column with the user-defined field information, use the column menu ⁝ and select the specific User-defined field column you would like to see on the list. For the example above you would select *Membership (Y/N)*.

Jackrabbit grids allow you to group, sort, filter for specific information, and more. Refer to **Work with Grids (Tables) in Jackrabbit** for helpful information.

Parent Portal Log Report

The **Parent Portal Log,** in the *Families* section of the *Reports* menu, can be used to search for updates to User-defined Fields that parents have made in their portals.

From the *Filter Option* criteria drop-down, select **User Defined Field Changes** and select a date or date range to view activity for. Click *Submit.*

Parent Portal Log

← RETURN	✓ SUBMIT

Search Criteria 🔍 Favorites 💾 Save Favorites ✗ Refresh ❓
Search for Portal Activity using search criteria below.

Location: [▾]
Filter Option: [User Defined Field Changes ▾]
Filter Text: [   ]
Activity Date From: [3/1/2020 📅] Through Date: [7/10/2020 📅]
✓ Submit

Sample Parent Portal Log Results

Parent Portal Log

← RETURN

View 1 - 8 of 8   🖨 Print   ↗ Export   ⟳ Refresh   **3 columns hidden**   ⊞ Show/Hide Columns   ⊙ Restore Columns

Date/Time (Local)	Family/Acct	Contact	Portal User ID	Message
3/2/2020 6:16:00 PM	Ager	Holly Ager	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed:
3/2/2020 6:15:00 PM	Ager	Holly Ager	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y
3/2/2020 6:14:00 PM	Ager	Holly Ager	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y
3/2/2020 6:13:00 PM	Ager	Holly Ager	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y

Clear Answers in User-defined Fields

A User ID, with the required permissions, can mass clear Family and Student User-defined Fields. This is helpful when starting a new session that requires updated information.

There are two User ID permissions required:

- In the *Families* Category of User Permissions, *Clear Family User-defined Fields*
- In the *Students* Category of User Permissions, *Clear Student User-defined Fields*

To clear all User-defined fields go to *Families* (menu) > *All Families* **or** *Students* (menu) > *All Students,* click the first column checkbox to select all. Click the mass actions icon ⋮ and select *Clear UDF Answers.* In the pop-up window, toggle the user-defined fields you want to clear and click *Clear.*

Note: Use the checkboxes in the 1st column of the grid if you want to select a group of families or students to clear their User-defined field answers only.

All Families

LOCATIONS
Families by location

STATUS
Families by status

ACCOUNTS RECEIVABLE
11 /31

Families w/ balances

Families w/ unpaid fees   Top 5 Balances

Wallace, $705.50
Lovell, $653.20
Uphill, $418.49
Zackmann, $411.55
Owers, $126.25

POLICY STATUS
Families by signed policy agreements

EPAYMENT STATUS
Families by ePayment status

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31 Selected   CLEAR SELECTIONS

ePayment Schedule
Family Discount
Family Fixed Fee
Membership Type
Clear UDF Answers

🖨 Print   📄 Export to Excel

Drag a column header and drop it here to group by that column

☑		FAMILY ↑ ⋮	STATUS ⋮	ADDRESS ⋮	CITY ⋮	STATE ⋮	ZIP ⋮	PHONE
☑	⋮	Ager	Active	2016 Hummingbird Cresent	Huntersville	NC	28078	(704) 374-2415
☑	⋮	Bowden	Active	4385 Kirk Place	Huntersville	NC	28078	(704) 555-4773
☑	⋮	Brown	Inactive	3866 McFarlane Crescent	Huntersville	NC	28078	(704) 555-1313
☑	⋮	Campbell	Active	6647 Georgia Street	Huntersville	NC	28078	(704) 555-6671