

# User-defined Fields

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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*.

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FAMILIES
STUDENTS
CLASSES
EVENTS
STAFF
TRANSACTIONS
STORE
REPORTS
STAFF PORTAL
TOOLS

?

## Edit Settings

← RETURN
SAVE CHANGES

CLOSED DATES
DASHBOARD ANNOUNCEMENTS
DROP-DOWN LISTS
LOCATIONS
MY ACCOUNT
NOTIFICATIONS
ORGANIZATION DEFAULTS
ORGANIZATION LOGO
STATEMENTS
TEXT MESSAGES
TUITION SETTINGS
**USER-DEFINED FIELDS**
USER IDS

### User-defined Field Settings

You can customize these fields for Families and Students. They will be found on the 'Misc' tab of Family and Student screens. They can also appear on the Web Registration form and Parent Portal.

**Family User-defined fields**

Family field	Label
Family field1:	Enter Coupon #
Family field2:	Membership (Y/N)?
Family field3:	
Family field4:	
Family field5:	

**Student User-defined fields**

Student field	Label
Student field1:	Photo Release (Y/N)?
Student field2:	Recital Participate (Y/N)?
Student field3:	
Student field4:	
Student field5:	

For the Online Registration Form and the Parent Portal, you have the option to make the User-defined fields hidden, optional, or required.

## 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.

**Family User-defined fields**
?
User-defined fields are set up in Tools > Edit Settings > [User-defined Fields](#)

Family field1	Optional ▼	Coupon #
Family field2	Required ▼	Carpool (Y/N)?
Family field3	Hidden ▼	
Family field4	Hidden ▼	
Family field5	Hidden ▼	

**Student User-defined fields**
?
User-defined fields are set up in Tools > Edit Settings > [User-defined Fields](#)

Student field1	Required ▼	Photo Release (Y/N)?
Student field2	Required ▼	Recital Participate (Y/N)?
Student field3	Hidden ▼	
Student field4	Hidden ▼	
Student field5	Hidden ▼	

## 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.

The screenshot shows two sections of a settings interface. The first section, titled 'Family User Defined Fields' with a help icon, contains five rows. Each row has a label for a family field and a dropdown menu for its update setting. The second section, titled 'Student User Defined Fields' with a help icon, contains five rows with similar labels and dropdown menus.

Family User Defined Fields	
Family field1: Coupon #	Can Update - Optional ▼
Family field2: Carpool (Y/N)?	Can Update - Required ▼
Family field3: <-blank->	Hidden ▼
Family field4: <-blank->	Hidden ▼
Family field5: <-blank->	Hidden ▼

  

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

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  [Calendar](#) Contract End Date  [Calendar](#)Booster  Referral Emergency Contact Form Completed  Enrollment Form Received 

Notes

[More...](#)Source  (How they heard about us) Referral Name Prospect  (Not automatically Updated)

Parent Portal Login Message

[More...](#)Portal Message Expiration Date  [Calendar](#) [?](#)

Last Policy Agreement Date 5/5/2020

Enter Coupon #:

Membership (Y/N):

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  [ID](#) Middle Initial  Last Name [Summary](#) [Classes](#) [Events](#) [Medical](#) [Feedback](#) [Skills/Levels](#) [Sizes](#) [Absences](#) [Misc](#) [Notes \(0\)](#) [Resources \(0\)](#)Emergency Contact Form Completed Enrollment Form Received 

Picture

[Delete Picture](#)

Roll Notes

[More...](#)

\*These Roll Notes will print on the Class Rolls.

SSN  [ID](#)

Photo Release (Y/N):

Recital Participate (Y/N):

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).

Showing 31 of 31 Families

Print Export to Excel

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

	LOCATION	FAMILY	BALANCE	STATUS	ADDRESS	CITY	STATE	ZIP
	EDU	Ager	40.00	Active	2016 Hummingbird Crescent	Huntersville	NC	28078
	EDU	Bowden	0.00	Active	4385 Kirk Place	Huntersville	NC	28078
	EDU	Brown	0.00	Inactive	3866 McFarlane Crescent	Huntersville	NC	28078
	EDU	Campbell	0.00	Active	6647 Georgia Street	Huntersville	NC	28078

Items per page

## 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:  [📅](#) Through Date:  [📅](#)

[✓ 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	<a href="#">Ager</a>	<a href="#">Holly Ager</a>	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed:
3/2/2020 6:15:00 PM	<a href="#">Ager</a>	<a href="#">Holly Ager</a>	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y
3/2/2020 6:14:00 PM	<a href="#">Ager</a>	<a href="#">Holly Ager</a>	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y
3/2/2020 6:13:00 PM	<a href="#">Ager</a>	<a href="#">Holly Ager</a>	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

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



31 Selected [CLEAR SELECTIONS](#)



Print

Export to Excel

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

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

<input checked="" type="checkbox"/>		FAMILY ↑ ⋮	STATUS ⋮	ADDRESS ⋮	CITY ⋮	STATE ⋮	ZIP ⋮	PHONE
<input checked="" type="checkbox"/>	⋮	Ager	Active	2016 Hummingbird Crescent	Huntersville	NC	28078	(704) 374-2415
<input checked="" type="checkbox"/>	⋮	Bowden	Active	4385 Kirk Place	Huntersville	NC	28078	(704) 555-4773
<input checked="" type="checkbox"/>	⋮	Brown	Inactive	3866 McFarlane Crescent	Huntersville	NC	28078	(704) 555-1313
<input checked="" type="checkbox"/>	⋮	Campbell	Active	6647 Georgia Street	Huntersville	NC	28078	(704) 555-6671