

# Accept Charitable Donations in Jackrabbit

Last Modified on 11/03/2020 12:33 am EST

Jackrabbit offers the ability to collect charitable donations from your families via the parent portal, and allows them to have control over the amount they would like to donate to the charity that you partner with.

## Getting Set Up to Accept Donations

Donations in Jackrabbit are managed using the Store module and the Parent Portal. Follow these steps to get Jackrabbit set up to accept charitable donations.

### 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 **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. Optionally, add **Notes**. The text entered here will display on the ♥Give page in the Parent Portal.
6. **Save**.

*Note: If you are using the Swim edition of Jackrabbit, this step has been completed for you as part of our partnership with the Hope Floats Foundation.*

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**Add Vendor**

\*Vendor Name:

\*Vendor ID:

Federal EIN:

Charity: ☒ Yes ☐ No Tax Exempt: ☒ Yes ☐ No

Contact:

Address1:

Address2:

City:  State:  Zip:

Phone:  Fax:

Email:

Website:

We are partnering with the Hope Floats Foundation to provide scholarships for swimming lessons for children living in poverty. Hope Floats raises money by partnering with individuals, businesses, and foundations that want to be a force for good in their communities. Scholarships and tuition assistance is provided to children who might not otherwise be able to afford swim lessons.

Notes:

This text will appear on the ♥Give page in the Parent Portal

## 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 **Tools** (menu) > **Edit Settings** > **Drop-down Lists** (left menu). Scroll down to the *Transaction* section and select **Transaction Type**.
2. Click **Add Row**, add the label for the transaction, e.g., "Donation", and select **Debit**.
3. **Save Changes**.

## Family: Evans

← RETURN
SAVE CHANGES
DELETE

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

Summary
Contacts
Classes
Events
Transactions
Billing Info
Misc
Notes (0)
Resources (0)

View Transaction History
View Unapplied Credits & Unpaid Fees

Current Balance **102.50**

View 1 - 20 of 20

Print

Refresh

8 columns hidden

Show/Hide Columns

Restore Columns

	Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Cat1
	9/30/2020	Payment	-25.00	0.00	102.50		Visa		
	9/30/2020	Donation	25.00	0.00	127.50	Hope Floats \$25 Donation	Visa		Charitable Donations

TRANSACTIONS

30

PARENT PORTAL TRANSACTION HISTORY

SORT BY

DATE: NEWEST FIRST

FILTER RESULTS

ADD A FILTER

DATE	TYPE	METHOD	AMOUNT	PAID	BALANCE
09/30/2020	Payment	Visa		50.00	102.50
09/30/2020	Donation		50.00		152.50

### Step 3 - Add items for each donation amount

Items created with a 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 labelled "Give #" where the # is the Item Price. Parents will select a button for the amount of donation they want to make.

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

1. Go to **Store** (menu) > **Items** and click **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. Because this is a non-inventory item, set *Track Qty on Hand* to **No**. 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 and **Save Changes**.

### Add Item

Item Info

Item #/Barcode: \* HFD0n-50 [?] [?] Item Name: \* Hope Floats \$50 Donation

Track Qty on Hand: No [?] [?]

Description:

Status: Active [?] [?]

Transaction Defaults

Item Price: \* 50.00 Item Tax: \* No Tax [?] [?]

Category 1: \* Charitable Donations

Transaction Type: \* Donation (Debit)

Transaction Sub-Type:

Vendor Info

Vendor: Hope Floats Foundation

Vendor Item #: [?] [?]

Item Cost:

Save Changes Copy Item Delete Item Cancel

### Receipt

From: Jackrabbit Help Center  
9820 Northcross Center Ct  
Huntersville, NC 28078

For: Evans  
341 Wildwood Crescent  
Huntersville, NC 28078

Itemized Receipt

Transaction type displays (from Step 2)

Payment Summary

Fee Date	Type	Student	Class/Event	Amount	Amount Paid
09/30/2020	Donation			50.00	50.00
				Payment: 50.00	

Billing Information

Taylor Evans  
28078

Customer ID: 18238273

Visa xxxxx-xxxx-xxxx-8886  
SUCCESS  
Authorization Code: 123456  
Transaction ID: 5681856503  
Date Paid: 09/30/2020 07:20 PM (EST)

## Hope Floats Foundation

We are partnering with the Hope Floats Foundation to provide scholarships for swimming lessons for children living in poverty. Hope Floats raises money by partnering with individuals, businesses, and foundations that want to be a force for good in their communities. Scholarships and tuition assistance is provided to children who might not otherwise be able to afford swim lessons.

GIVE 10 GIVE 25 GIVE 50 GIVE 100

## 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 **Tools (menu) > 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. From the *Select charity* drop-down list; choose the charity to be added to the ♥Give page in the Parent Portal.

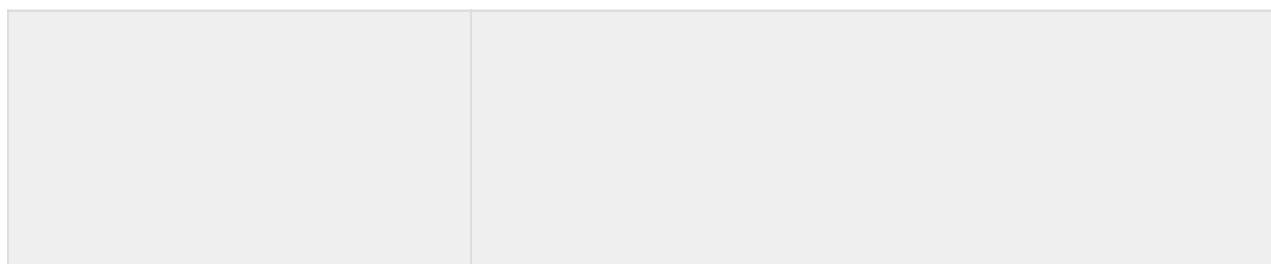
### Accepting Donations

Would you like to accept donations on behalf of a charity? **Yes** ▼

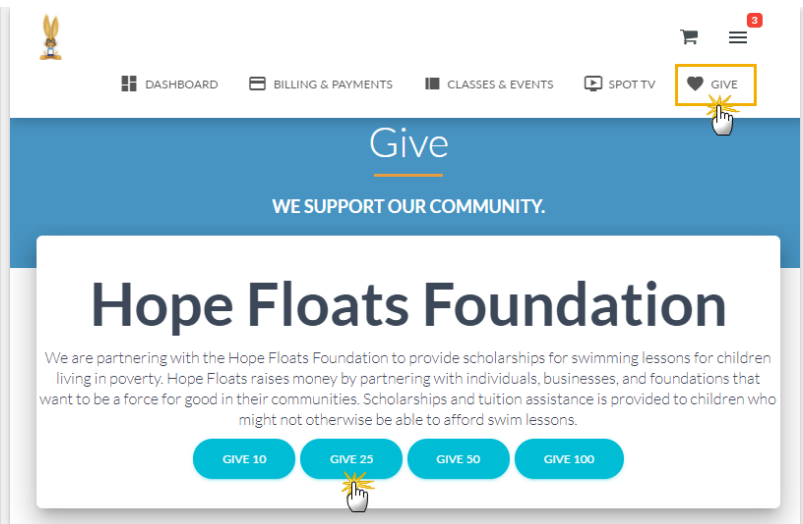
Select charity\* **Hope Floats Foundation** ▼

## The Donation Process in the Parent Portal

Once you have completed the setup above, your families will see the ♥Give option in their Parent Portal.

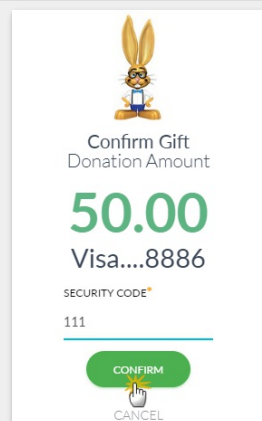


- On the ♥Give page, parents will select the **Give #** button for the amount of donation they want to make.

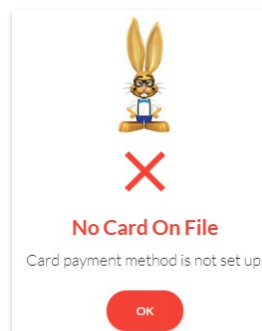


*Immediate payment by credit card is required when a donation is made in the Parent Portal.*

- The credit card authorization modal will open, and the parent will be asked to enter and confirm their security code from the back of their card.

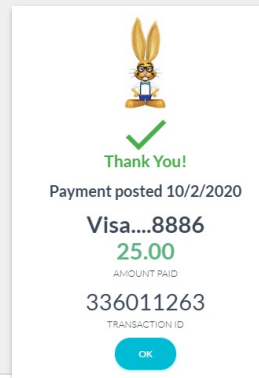


- If the family does not have a credit card on file, they will see a notification that their card payment method is not set up.
- They will need to either **add their credit card in the portal** or call your office to have the card added before they will be able to make the donation in their portal.



- Upon credit card approval, a confirmation will display the amount paid with a Transaction ID.

- An 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.



## Reporting for Charitable Donations

The [Paid Fees](#) and [Revenue Summary](#) reports can be generated to either include or exclude charitable donations using the **Display Setting Show Charitable Donations**.

In the body of the report, 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.

Date: 10/2/2020 7:49:27 PM		Paid Fees Summary		Page 1	
10/2/2020 - 10/2/2020					
Cat1				Tax	Pmt Amt
Charitable Donations					
		Donation Subtotal:		0.00	150.00
		Charitable Donations Total:		0.00	150.00
Dance					
		Costume Fee		0.00	170.00
		Total:			
# of Items: 12		Total Revenue:		0.00	399.38
# of Items: 3		Total Charitable Donations:		0.00	150.00
# of Items: 15		Total Payments Received:		0.00	549.38

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Date: 10/5/2020 12:27:37 PM

## Revenue Summary

Page 1

10/2/2020 - 10/2/2020

Cat1	Cat2	Cat3	Class/Event	Enrollment	Discount	Amount
Charitable Donations						
			--No Class/Event Name--	0	0.00	150.00
			Cat3 Subtotal:	0	0.00	150.00
			Cat2 Subtotal:	0	0.00	150.00
			Charitable Donations Subtotal:	0	0.00	150.00
Dance						
			Advanced			
			Tuition:	0	0.00	
			Totals:	3	110.00	549.38
			Total Revenue*:			399.38
			Total Charitable Donations:			150.00
			Total Payments Received:			549.38

The [Revenue Snapshot](#) report, as a summary of all payments that reconciles to the Deposit Slip report, will always display charitable donations.

Date: 10/5/2020 12:26:39 PM

## Revenue Snapshot

Page: 1

10/2/2020 - 10/2/2020

Date	Location					
		Payment Method				Amount
10/02/2020	EDU	Visa				524.38
10/02/2020	SUP	Visa				25.00
		Daily Payment Method Subtotal				549.38
		Category	Type	Pmt Mthd	Amount	Amount
10/02/2020	CCD	Gymnastics	Tuition Fee	Visa	-75.00	
10/02/2020	CCD	Gymnastics			Subtotal:	-75.00
10/02/2020	EDU	Charitable Donations	Donation	Visa	-150.00	
10/02/2020	EDU	Charitable Donations			Subtotal:	-150.00
10/02/2020	EDU	Dance	Costume Fee	Visa	-170.00	
10/02/2020	EDU	Dance			Subtotal:	-170.00
10/02/2020	EDU	Dance	Tuition Fee	Visa	-154.38	
10/02/2020	EDU	Dance			Subtotal:	-154.38
		Daily Revenue Subtotal				-399.38
		Daily Charitable Donation Subtotal				-150.00
		Daily Payments Received				-549.38
		Report Subtotal				549.38
		Report Total				549.38