

Process Class Registrations Report

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

The **Process Class Registrations** report allows you to review all registrations and class enrollments including those coming in through Online Registration, from the Parent Portal, and those done from within Jackrabbit. Additions to waitlists are also displayed.

This one-stop shop provides you with a report to work through registrations and class enrollments, giving your team visibility so they can work together efficiently.

- ★ Streamline registration workflow and improve efficiency.
- ★ Review pertinent information and process registrations and class enrollments from a centralized location.
- ★ Identify families who did not have fees posted with their registration or class enrollment.

Note: The date range for this report is limited to 60 days.

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Business Scenario

The Process Class Registrations report is perfect for verifying that registration fees are posted for all Parent Portal enrollments. With the ability to see the registration source on this report, easily find Parent Portal enrollments and post fees accordingly.

To create this report use these three search filters:

- *Session* = **2019 Fall 1**
 - *Date from* **8/1/2019** through **10/1/2019**
 - *Registration Source* = **Portal**
-

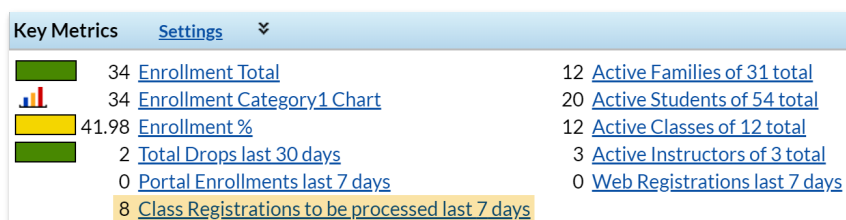
Access the Report

Jackrabbit Users with the *Process Registrations* permission (in the *Reports* category of **User ID Permissions**) can access the Process Class Registrations report from either the *Executive Dashboard* or from the *Reports* menu.

From the Executive Dashboard

In the *Key Metrics* section of the *Executive Dashboard*, the **Class Registrations to be processed last 7 days** link will take you to the report that covers the number of days you define with the *Last X Days* Dashboard setting.

Using these settings, you can customize which class registrations will be included in the report when you access it through the link. For this business scenario, we are looking at enrollments created in the last 7 days.



When you access the report from the Dashboard you will have the option of omitting registrations marked *Complete*, from within report results. Refer to **Key Metrics on the Dashboard** for more details on *Settings*.

From the Reports Menu

The **Process Class Registrations** report can also be accessed from the *Reports* menu. Go to **Reports > Families/Students > Students (tab) > Process Class Registrations**.



Make this report a **Favorite** so you can find it quickly and easily!

Search Criteria

When you access Process Class Registrations from the *Reports* menu, you can use search criteria to narrow down your results to a very specific group of registrations, class enrollments (including trials), or waitlist additions.

Search Criteria [Favorites](#) [Save Favorites](#) [Refresh](#) [?](#)

Search all Family registrations, Class enrollments, and Waitlist additions made via the Portal, Online Web Registration, and within Jackrabbitt. This does not include Event enrollments.

Family Location

Class Location

Session

Date from* through

Type* ☒ Enrollments
☒ Trial Enrollments
☒ Registrations
☒ Waitlists

Registration Status

Registration Source

Created by

The Search Criteria selected here will return all enrollments and registrations for the 2009 Fall 1 Session. This includes trials and waitlists that were completed in the Parent Portal.

Report Results

Process Class Registrations

← RETURN [EMAIL](#)

Customize your report by selecting which columns of information to display.

Legend ■ No valid Card/Acct by the end of next month

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	Registration Status	Type	Student	Age	Gender	Class	Enroll Date	Family/Acct	Primary Contact	Primary Contact Email	Card/Ac on File	Fee(s) Posted	Balance	Registration Source	
	New	Enrollment	John Madigan	13	Male	Ballet - Pointe - T	8/28/2019	Madigan	Keira Madigan	mad17@example.com	1	52.67	0.00	PPortal	More <input type="checkbox"/>
	New	Enrollment	Annabelle Welch	11	Female	Little Otters - Beg - T/Th	8/28/2019	Welch	Jean Welch	jeanwelch@example.com	1	375.00	0.00	PPortal	More <input type="checkbox"/>
	New	Enrollment	Toni Ashton	14	Female	Allstars Youth Fall	8/28/2019	Ashton	Barbara Ashton	BarbsAshton@example.com	0	467.50	0.00	PPortal	More <input type="checkbox"/>
	New	Enrollment	Megan Yost	9	Female	Tumbling 101	8/28/2019	Yost	Beth Yost	Byost@example.com	1	181.50	181.50	PPortal	More <input type="checkbox"/>
	New	Enrollment	Jakob Clayton	9	Male	Intro to Piano - Beg - Th	8/28/2019	Clayton	Janice Clayton	jclayton78@email.com	1	75.00	0.00	PPortal	More <input type="checkbox"/>

- Select the check box in the last column to select all, or select check boxes for individual rows, and use the **Email** button to generate a confirmation email to those families.
- Use **Show/Hide Columns** to select which columns of information you want displayed. Available columns are:

Show/Hide Columns - Process Registrations

Uncheck columns and click the "Apply" button to hide columns.
Click the "Apply & Save" button to save these settings for your User ID.


Check All Uncheck All

<input checked="" type="checkbox"/> Registration Status	<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> New Family as of 8/1/2019	<input type="checkbox"/> Home/Primary Phone
<input type="checkbox"/> Internal Notes	<input type="checkbox"/> ClassLocation	<input type="checkbox"/> Family Reg. Date	<input checked="" type="checkbox"/> Card/Acct on File
<input type="checkbox"/> Last Updated By	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Primary Contact	<input type="checkbox"/> Family Fixed Fee
<input checked="" type="checkbox"/> Type	<input type="checkbox"/> Session	<input checked="" type="checkbox"/> Primary Contact Email	<input type="checkbox"/> Student Fixed Fee
<input type="checkbox"/> Family Loc	<input type="checkbox"/> Category1	<input type="checkbox"/> Primary Contact Phone	<input checked="" type="checkbox"/> Fee(s) Posted
<input type="checkbox"/> Date/Time	<input type="checkbox"/> Instructor	<input type="checkbox"/> Address	<input checked="" type="checkbox"/> Balance
<input checked="" type="checkbox"/> Student	<input type="checkbox"/> Comments	<input type="checkbox"/> City	<input checked="" type="checkbox"/> Registration Source
<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Enroll Date	<input type="checkbox"/> State	<input type="checkbox"/> Source
<input type="checkbox"/> Birthdate	<input checked="" type="checkbox"/> Family/Acct	<input type="checkbox"/> Zip	<input type="checkbox"/> Referral Name
			<input type="checkbox"/> User

Apply Apply & Save Cancel

- Select **Apply** to have these selections applied to only the report you are currently viewing.
- Select **Apply & Save** to have these selections applied and saved for your User ID. When logged in as your User ID, you will see only the columns of information you chose previously. Other Users will see the columns they selected and saved, which may differ from yours.
- Use **Restore Columns** to view all available columns.

Process New Class Registrations

The **Registration Status** column indicates the status of each registration or enrollment. All statuses default to **New** when the registration/enrollment is created. Use the **In Progress** status to indicate that work has been started on that registration/enrollment. Click the  **Pencil** to edit and process new enrollments.

Registrations/enrollments are automatically changed to **Complete** if a student is dropped or transferred out of the class. You can change the status from either **New** or **In Progress** to **Complete** when you have finished working with a row.

Process Class Registrations

← RETURN

✉ EMAIL

Leg

View 1 - 14 of 14

Print

Export

Refresh

23 columns hidden

Show/Hide Columns

Restore Column

	Registration Status	Internal Notes	Type	Date/Time	Student	Class	Comments	Family/Acct
	▼	Search	Search	Search	Search	Search	Search	Search
	New		Waitlist	8/25/2019 4:02:43 PM	Barbie Ager	Ballet L1 - Mon 5pm	Waitlisted - Portal	Ager
	Complete	Dropped Class.	Enrollment	8/25/2019 4:01:11 PM	Betty Golding	Ballet L1 - Mon 5pm		Golding
	New		Enrollment	8/25/2019 3:49:44 PM	Shawna Evans	Tap L2 - Tues 7pm		Evans
	New		Trial	8/25/2019 3:37:55 PM	Shawna Evans	Tap L1 - Mon 6pm		Xanders
	New		Registration	8/25/2019 3:37:55 PM	Liam Xanders			Xanders
	In Progress	Emailed - waiting on reply from Holly	Enrollment	8/25/2019 3:33:13 PM	Dave Ager	Hip Hop L2 - Thurs 7pm	Prev Hip-Hop taken at LA Studio	Ager
	In Progress		Enrollment	8/25/2019 3:19:42 PM	Miguel Verdejo	Hip Hop L2 - Thurs 7pm	Looking forward to meeting you all!	Verdejo
	New		Enrollment	8/25/2019 3:06:59 PM	Dani Ager	Artistic Gymnastics L3 - Thurs 7pm	Dani and Dave have both competed in the Provincials previously.	Ager

- **Internal Notes** are automatically populated when a student is dropped from a class or when a student is enrolled from a waitlist. When you edit a row, you have the option of adding a note which will display in the **Internal Notes** column.
- **Process multiple class registrations** at one time! Use the check box column to select the registrations/enrollments you want to update and then select the **Edit** icon to change the status of each row and optionally keep, delete, or replace all Internal Notes for those registrations.

Process Class Registrations

← RETURN ✉ EMAIL

5 selected CLEAR SELECTIONS

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	Registration Status	Internal Notes	Type	Date/Time
	New		Waitlist	8/25/2019 4:02:43 PM
	Complete	Dropped Class.	Enrollment	8/25/2019 4:01:11 PM
	Complete	Confirmed (SO)	Enrollment	8/25/2019 3:49:44 PM
	New		Trial	8/25/2019 3:37:55 PM
	New		Registration	8/25/2019 3:37:55 PM
	In Progress	Emailed - waiting on reply from Holly	Enrollment	8/25/2019 3:33:13 PM

Legend ■ No valid Card/Acct by the end of next month

Process 5 Class Registrations

Registration Status: Complete

Note:

☐ Keep all notes
☐ Delete all notes
☐ Replace all notes

Confirmed (SO) 8/26/19

177 Characters Left

CANCEL SAVE

More

More

More

More

More

More

- The **Type** column provides detail about the type of each enrollment or registration (Waitlist,

Enrollment, Registration, Trial).

- Comments that a parent makes during Online Registration, or during Parent Portal enrollments, will display in the **Comments** column.
 - The **New Family as of** column identifies families that are new to your facility. This makes it quick and easy to send those families a welcome email!
 - The **Card/Acct on File** column lets you know which families have ePayment information on file and alerts you to those whose payment information is expiring soon.
 - Select the **More** button to view additional information for the family.
 - Use the **links** throughout the report for quick access to related records.
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