

Weekly Procedures that will Keep your Jackrabbit House in Order

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Keeping your data updated ensures accurate reporting, empowering you to provide trustworthy information to your customers and staff.

Approve/Unapprove Time

If you are using Jackrabbit's **Time Clock** feature, you may find it beneficial to approve time on a weekly basis, rather than at the end of the pay period.

Approving time weekly helps you to:

- Identify and address concerns with time entries early on.
- "Lock in" time entries so the entries cannot be edited at a later time.
- Save time in advance of payroll deadline.



Use the **Save Favorites** button to save the search criteria, making it easy to run weekly.

Notify Customer of Expired Credit Cards

Conduct an All Families search to see which customers have expired credit cards. This will address your customers' ability to pay their account balance prior to processing ePayments. You can **email families** who have a missing or expired credit card using the pre-made template in your database. Add the **link to your Parent Portal** in the **email template** allowing parents to login and update the existing card or add a new card on file easily.





Notifying customers that their credit card is expired or is not saved on file can reduce the amount of time spent on **accounts receivable** collections by up to 30%!

Transaction Clean Up

Fixing transactions in your database regularly ensures correct data. You can do this on a daily basis if you prefer but we suggest doing this on a weekly basis, at the least.

Transaction clean up includes:

- Finding transactions that need to be linked
- Linking unapplied credits (payments) to corresponding fees, if applicable

Check out our Best Practice article [Maintaining Accurate Revenue Reports](#) for more details on this process.

New Registrations and Enrollments

The [Key Metrics](#) section of your Dashboard is a great place for you to see a snapshot of new registrations and enrollments. If you are in a slower period of registrations, you can do this weekly rather than daily.

Use the *Class Registrations to be processed in the last X days* link to process registrations from new families and enrollments from existing families, all in one place. It is important to verify all related fees have been posted (registration fee, tuition, etc). Depending on your settings, fees may post automatically. We recommend you review the [Process Class Registrations Report](#) article for more detailed information and instructions.

As you confirm registrations and enrollments are correct and have been processed, you can mark them as complete!



Registration fees for Parent Portal enrollments will need to be posted by a Jackrabbit user. Use **Post Annual Fees** to post registration fees to all enrollments within a chosen date range at once!

Weekly Checklist

Staying consistent with the frequency of vital tasks will set you up for success. Use these suggestions to devise the best weekly routine for you and your office staff.

Check out our sample weekly checklist below!

Weekly Procedures Checklist

- ☐ Approve / Unapprove time
 - ☐ Notify customers of expired credit cards
 - ☐ Transaction clean up
 - ☐ Check Dashboard for new registrations and enrollments
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