

User-defined Fields

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Watch a (1:55) video tutorial on User-defined Fields

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What are User-defined Fields?

Family and Student User-defined Fields (5 of each) are custom fields you create that allow you to capture and store additional information that is important to your organization such as coupon numbers, past skill achievement, association membership numbers, etc.

With [Agreement Text \(Legalese\)](#), Jackrabbit requires parents to consent to your policies in order to complete and submit the Online Registration Form. Depending on your settings, parents may also be prompted to agree to your policies prior to enrolling in classes through the Parent Portal.

The Agreement Text offered are checkboxes that your parents must select to indicate their agreement to each of your policies. You may, however, have questions that you would like to ask your families

during registration that require an answer, as opposed to just their indication of agreement, e.g., recital participation. User-defined Fields are perfect for this!

Business Scenario

You want to capture whether or not your parents agree to allow you to use their child's photo in your promotional materials.

Because the Agreement Text in Jackrabbit must all be selected for the parent to be able to continue with online registration, they are not able to answer *Yes* by selecting the policy and *No* by leaving it unchecked. This is where User-defined fields come to the rescue!

Use the Agreement Text to explain what the photo release is for. You can note in the agreement that selecting the checkbox means the parent understands the policy. The actual release question would be answered by the parent in the User-defined field. Consider naming your User-defined Field "Photo Release (Y/N)" or something similar. Including the "(Y/N)" helps to prompt parents to enter more consistent answers.

How are User-defined Fields Created?

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

Edit Settings

← RETURN **SAVE CHANGES**

USER-DEFINED FIELDS

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 Label

Family field1: Coupon #

Family field2: Carpool (Y/N)?

Family field3:

Family field4:

Family field5:

Student User-defined fields Label

Student field1: Photo Release (Y/N)?

Student field2: Recital Participate (Y/N)?

Student field3:

Student field4:

Student field5:

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

User-defined Fields in Online Registration

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	▼	

User-defined Fields in the Parent Portal

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.

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.**

Where are the Answers to the User-defined Fields Stored?

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

← RETURN

SAVE CHANGES

DELETE

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Push Notification Email Schedules Merge Family

Summary Contacts Classes Events Transactions Billing Info **Misc**

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 4/10/2018

Coupon #:

Carpool (Y/N)? N

Field3:

Field4:

Field5:

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

Student: Dani Ager

← RETURN **SAVE CHANGES** **DELETE**

Enroll Email Schedules Info Sheet Absence/Attendance

Family: [Ager](#) First Name Middle Initial Last Name

Summary Classes Events **Medical** Feedback Skills/Levels Sizes Absences **Misc**

Emergency Contact Form Completed Enrollment Form Received

Picture



Roll Notes

*These Roll Notes will print on the Class Rolls.

SSN

Photo Release (Y/N)?:	<input type="text" value="Y"/>
Recital Participate (Y/N)?:	<input type="text"/>
Field3:	<input type="text"/>
Field4:	<input type="text"/>
Field5:	<input type="text"/>

Secret Word

Reporting on User-defined Fields

Families > Search

Use **Search** from the *Families* menu to report on Family User-defined Fields by changing the Display Setting *Show Family User-defined fields?* to Yes.

Optionally, you can enter specific values for a User-defined Field to search for families who have that specific value.

Family User-defined fields

Coupon # Field 4

Carpool? Y/N Field 5

Field 3

Display Settings

Show Family User-defined fields?

Show Contract Date fields?

Show Date Created/Imported/Registered/Updated fields?

Show Portal/Agree fields?

Show Membership Type fields?

Show Source/Referral fields?

Show ePayment fields?

Show Notes/Billing Instructions?

Show Billing Contact fields?

Show Account number?

Search for families who have a specific value in their User-defined Fields.

[Students > Search](#)

Use **Search** from the *Students* menu to report on Student User-defined Fields by changing the Display Setting **Show Student User-defined Fields** to *Yes*.

It is not possible to search for a specific value with Student User-defined Fields.

Display Settings

Show Student Medical Fields

Show Student Sizes Fields

Show Student User Defined Fields

Show Student Address Fields

Show Student Roll Notes

[Parent Portal Log](#)

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.

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

Parent Portal Log

← RETURN

View 1 - 2 of 2 [Print](#) [Export](#) [Refresh](#) [Show/Hide Columns](#)

Date/Time (Local)	Loc	Family/Acct	Contact	Portal User ID	Logins	Contact Email	Message
4/8/2019 4:03:00 PM	EDU	Ager	Holly Ager	hollyager41@gmail.com	125	hollyager41@gmail.com	Student UDF 2: Recital Participate (Y/N)? changed: Y
4/8/2019 4:03:00 PM	EDU	Ager	Holly Ager	hollyager41@gmail.com	125	hollyager41@gmail.com	Student UDF 1: Photo Release (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:

1. In the *Families* section of permissions, *Clear Answers in Family User-defined Fields (UDF)*
2. In the *Students* section of permissions, *Clear Answers in Student User-defined Fields (UDF)*

From each of the *Families* and *Students* menus, the **Clear UDF Answers** option will open a window that will ask you which of the respective User-defined Field(s) you want to clear.

Clear Answers in Family User-defined Fields

← RETURN ✓ SUBMIT

This will clear the User-definable field answers in the Family Misc tab. [?](#)

Which do you want to clear?

- Family field1: Coupon #
- Family field2: Carpool (Y/N)?

✓ Submit