

Accept Charitable Donations in Jackrabbit

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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.

[Watch this short video for an overview of the Charitable Donations feature in Jackrabbit.](#)

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**.
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Add Vendor

*Vendor Name:

*Vendor ID:

Federal EIN:

Charity: Tax Exempt:

Contact:

Address1:

Address2:

City: State: Zip:

Phone: Fax:

Email:

Website:

Notes:

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.

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**

Last 20 (Most Recent) Transactions

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 FILTER RESULTS

DATE: NEWEST FIRST 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: HFDan-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

Note: Hope Floats \$50 Donation

Billing Information
 Taylor Evans
 28078
 Customer ID: 18238273
 Visa xxxxx-xxxx-xxxx-8886
 SUCCESS
 Authorization Code: 123456
 Transaction ID: 5681356503
 Date Paid: 09/30/2020 07:20 PM (EST)

Parent Portal Give Page

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.

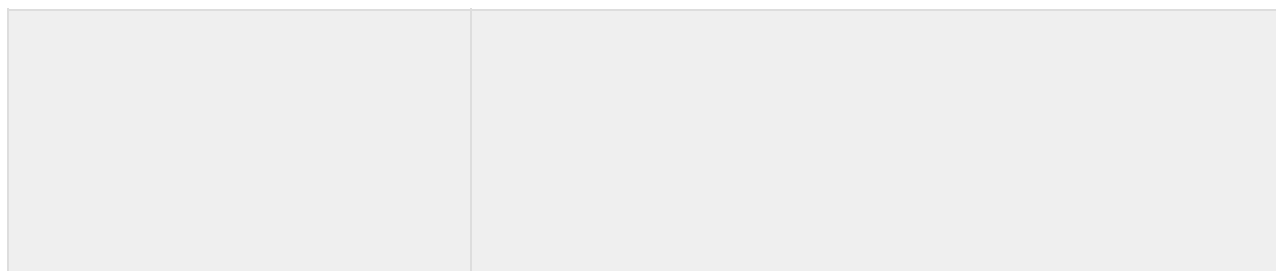
Accepting Donations

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.

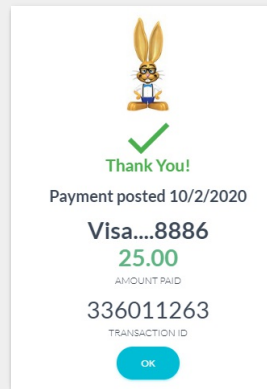
- The credit card authorization modal will open, and the parent will be asked to enter and confirm their security code from the back of their card.

- 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 report](#) 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 Subtotal:	0.00	170.00	
	Tuition Fee Subtotal:	0.00	154.38	
	Dance Total:	0.00	324.38	
Gymnastics				
	Tuition Fee Subtotal:	0.00	75.00	
	Gymnastics Total:	0.00	75.00	
# 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