



# Daily & Weekly Checklists

IMPLEMENTING A CONSISTENT ROUTINE ALLOWS YOU TO MANAGE YOUR JACKRABBIT ACCOUNT EFFECTIVELY. HERE ARE SOME SUGGESTED PROCEDURES TO HELP YOU STAY "ON TOP OF THINGS."

## Daily Checklist

- Check the Key Metrics on the Dashboard for [Class Registrations to be processed](#).
  - Take action as needed for new enrollments. For example, post fees, send an email, etc.
- Check [Dashboard Alerts](#) and select the quick links to view important reports.
  - Check Waitlists for Class Openings and enroll students from the waitlist.
  - Check for [Incomplete Time Entries](#) and contact staff as needed.
  - Check for [Incomplete Staff Portal Attendance](#) and contact staff as needed.
  - Take action as needed for any alerts.
- Run the [Drop History Report](#) for the previous day to reach out to students who dropped a class. Review the Family Account if needed.
- Run the [Deposit Slip Report](#) to do a check and balance of payments. Does the sum for cash and checks match what you have on hand (your bank deposit slip)?
- Log in to your [virtual terminal](#) and do a [Bank Reconciliation When Using ePayments](#) to ensure your virtual terminal and Jackrabbit reports are in agreement.
- Use Find Unapplied Credits from the Transactions menu to [Locate and Correct Unlinked Transactions](#) to improve the accuracy of Jackrabbit revenue reports and provide clear communication to your clients on how their payments are applied. Alternatively, use the [Paid Fees Report](#). Unapplied payments are at the bottom of the report.

## Weekly Checklist

- Check Data Visuals on [All Classes](#) or review your [Weekly Calendar](#) to look for trends and take action as needed. For example, is it time to add a class, contact a family, or move students from the waitlist?
- Time Clock (depending on your pay period schedule):
  - View time entries and resolve [Incomplete Time Entries](#).
  - [Approve / Unapprove Time Entries](#).
  - [Close pay period](#).
  - Export payroll to [Express Payroll](#) or [Export to Excel \(CSV File\)](#).