




















# Start Up Checklist

## STEPS FOR SUCCESSFUL SETUP

CLICK ON THE  FOR STEP-BY-STEP INSTRUCTIONS

- Get free expert help setting up your system by scheduling your first Setup Call. 
- Complete Quick Start Wizard - Gear (icon) > Set Up > Quick Start Wizard.
- Set up ePayments. 
- Review and update the Gear (icon) > Settings > General page as needed. 
- Review and edit left hand menu found under the Gear (icon) > Settings > General. 
- Update Drop-down Lists to reflect my business filters and options. 
- Set up Tuition Settings - billing methods, discounting and prorating. 
- Add all staff to database - Staff (menu) > Add Staff. 
- Assign User Ids to those staff who will require admin access to the database. 
- Add classes or email [imports@jackrabbittech.com](mailto:imports@jackrabbittech.com) to request your classes be imported. 
- Set up Staff Portal for instructors to access schedules/classes for attendance/skills tracking. 
- Set up Online Registration Form: 
  - Settings
  - Field Options & Labels
- Create Legal Policies. 
- Test my Registration Form. 
- Set up Parent Portal: 
  - Landing page message 
  - Settings
- Test my Parent Portal. 
- Set up Class Listings Tables. 
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*Let's Get Ready to Go!*

For more great instructions and links, go to our [Getting Started Page](#).