Lesson #6 - Post Fees to an Individual Family

Review (Optional)

The sixth lesson in this Learning Series, Front Desk Staff, is designed to get you familiar with posting fees to a single family. You may wish to review the articles listed below before beginning.

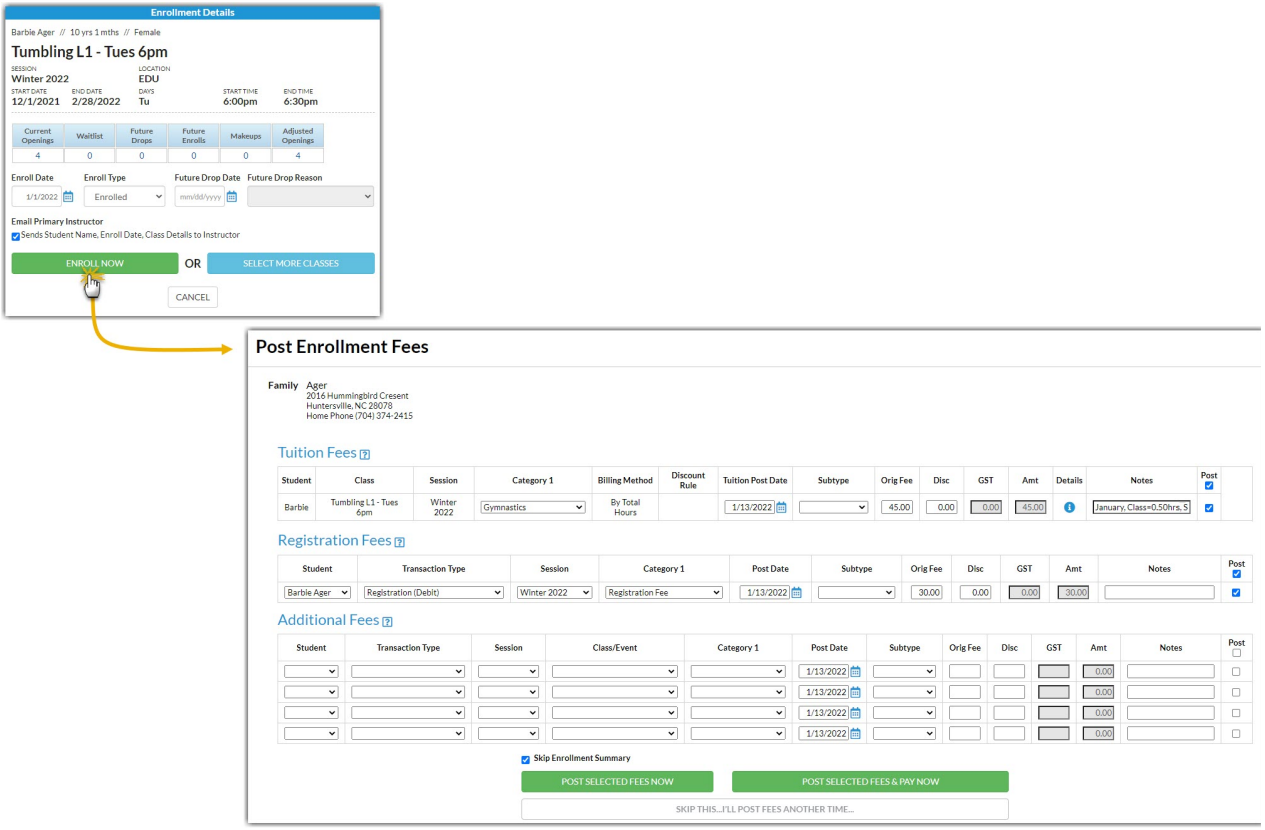
The review articles in the bullet list below will open the Help article in a new tab. When you are finished reviewing the material, close the tab and return to this page to access the next article using the links below.

- **Work With All Families - View, Search, and Mass Actions**
- **Search for People in your Database**

Post Tuition Fees During Enrollment in Jackrabbit

Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for Posting Tuition Fees**.

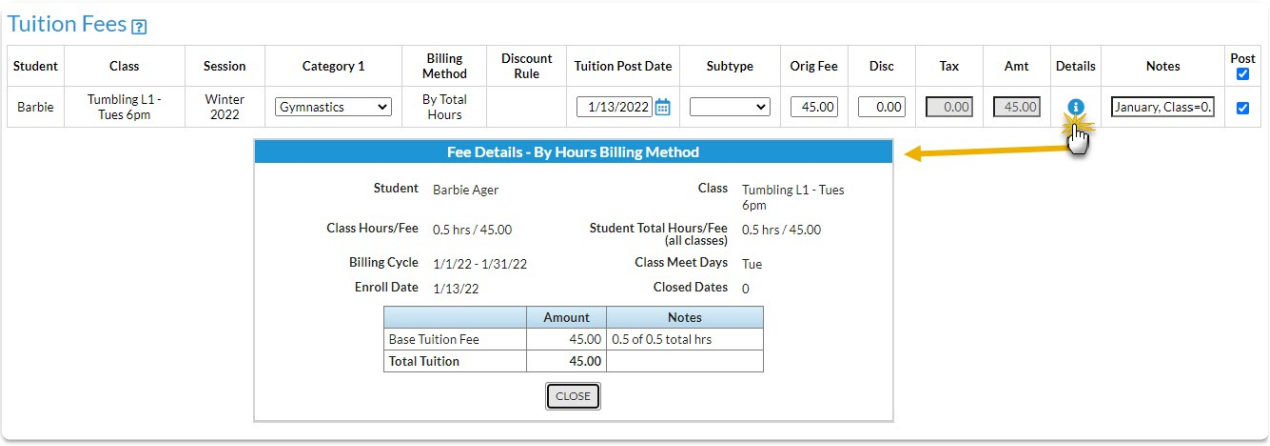
When a student is **enrolled in classes from within Jackrabbit**, i.e. internally, staff can be given the option to post enrollment fees, including tuition fees. A staff person with the required **User Permissions** will be taken to the **Post Enrollment Fees** screen.



When posting tuition fees in the Post Enrollment Fees screen, Jackrabbit uses the settings you've saved in several places to calculate tuition.

- **Tax Settings** under the *Gear (icon) > Settings > General > Organization Defaults (left menu) > Tax Settings.*
- **Tuition Settings** under the *Gear (icon) > Settings > Tuition & Discounting.*
- **Class Settings** (Tuition Fee) on the *Class Summary tab.*

A detailed breakdown of the calculations can be accessed using the icon in the *Details* column in the *Tuition Fees* section.



You can edit the *Tuition Post Date*, *Subtype*, *Orig Fee*, or *Disc* fields as needed. Clear the *Post* checkbox if you do not want to post tuition fees at this time. ***Note:*** Edits made to the Orig Fee or Disc are not updated in the *Fee Details* window.

The Post Enrollment screen also provides an opportunity to post enrollment fees other than tuition.

Registration Fees

Additional Fees

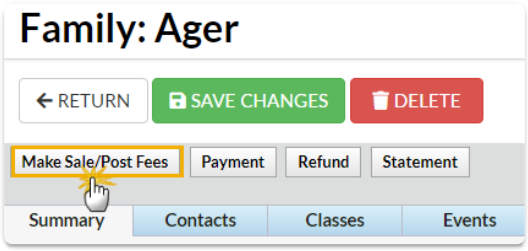
Post Tuition Using Make Sale/Post Fees

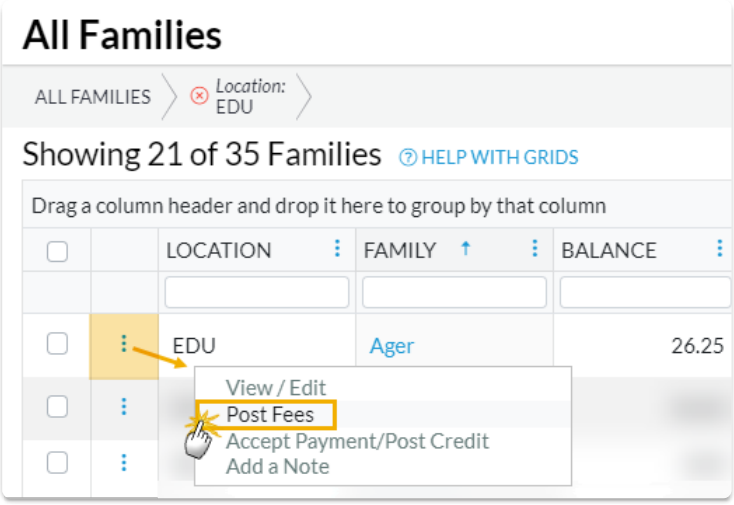
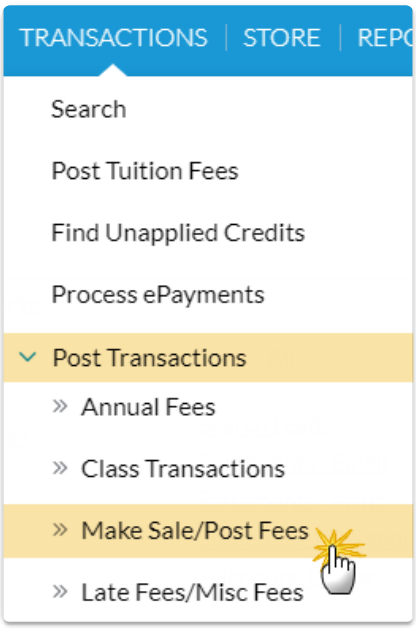
Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for Posting Tuition Fees**.

To accommodate different workflows, Jackrabbit offers **several ways to post tuition fees** One of the ways a tuition fee can be posted within Jackrabbit is using the **Make Sale/Post Fees** page.

Tuition fees posted using the Make Sale/Post Fees page are not automatically discounted or prorated per your **Tuition Settings**; the calculations must be done manually. To post tuition with the automated calculations use **Post Tuition Fees** from the Transactions menu. The Family Search criteria can be used to select a specific family to post fees for.

The Make Sale/Post Fees page can be accessed in several ways:

• From a *Family* record using the **Make Sale/Post Fees** button.	

• From **All Families** (*Families* menu) using the **Post Fees** action in the row menu for a family.	
• Using **Post Transactions** > **Make Sale/Post Fees** from the *Transactions* menu.	

When accessed from a *Family* record or from the row menu in*All Families*, the Make Sale/Post Fees page will open auto-filled with the family's address and their current balance. A link is provided to quickly access their transaction history.

When accessed from the *Transactions (menu) > Post Transactions > Make Sale/Post Fees*, an individual family or a store account must be selected on the page using a search field.

Post Tuition Fees with Make Sale/Post Fees

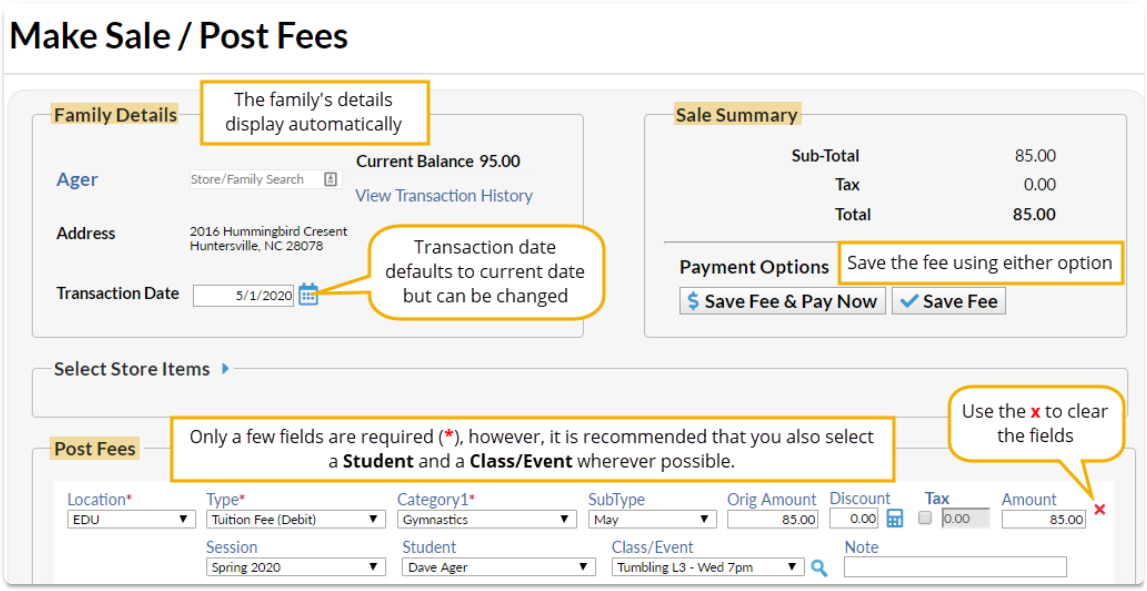
1. Open the **Make Sale/Post Fees** page.

- The *Family Details* section of the Make Sale/Post Fees page is auto-filled with the family's information when accessed from the Family record or from All Families.
- If accessed from the Transactions menu, use the search field to locate the family you want to post tuition fees to.

2. Change the date if needed. The **Transaction Date** defaults to the current date.
3. Go to the **Post Fees** section below the *Select Store Items* section (used for **store** transactions).
4. Enter the details for the tuition fees you want to post. An unlimited number of fees can be entered; additional fee lines are added automatically as you enter fees.
   - The following fields are required (*): **Location** (if you have multiple locations in Jackrabbit), **Type** (Transaction), and **Category 1.**
   - Optional fields allow you to add important details: **SubType**, **Session**, **Student**, **Class/Event,** and **Note**.
   - Enter the **Orig Amount** and calculate any discounts.

It's VERY important to select the **Tuition** Transaction Type, a **Student,** and a **Class**. These details ensure the fee is detected with **Advanced Detection** and make sure the **Tuition Not Posted** report, the **Students > All Students** filter "*Has not had a tuition fee posted since*", revenue reports, and other reports are more accurate.

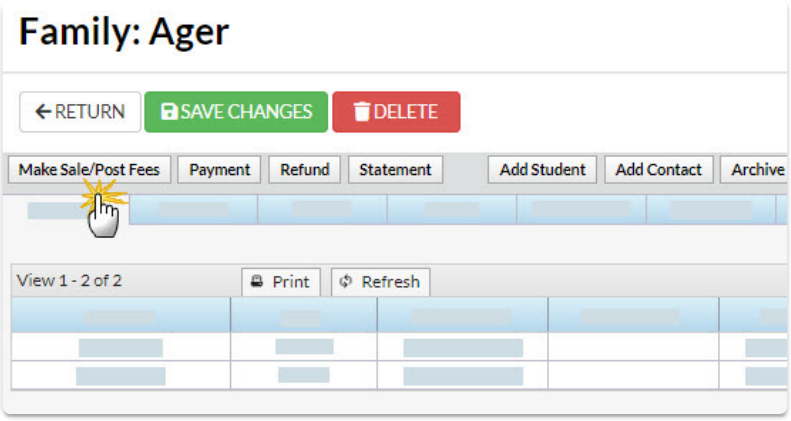
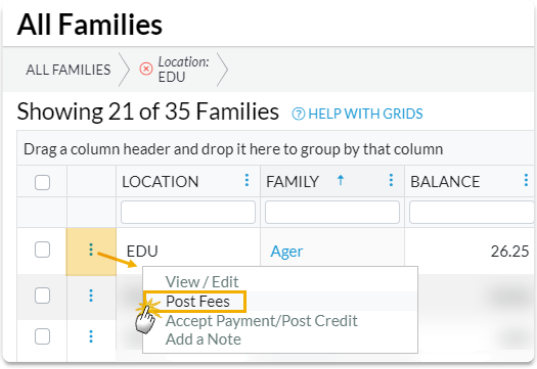
5. Select either option to save the fee in the *Sale Summary* section.
   - If you click **Save Fee & Pay Now**, the *Payment Transaction Entry* window opens allowing you to process the payment.
   - If you click **Save Fee**, you are returned to the *Transactions* tab in the family's record.

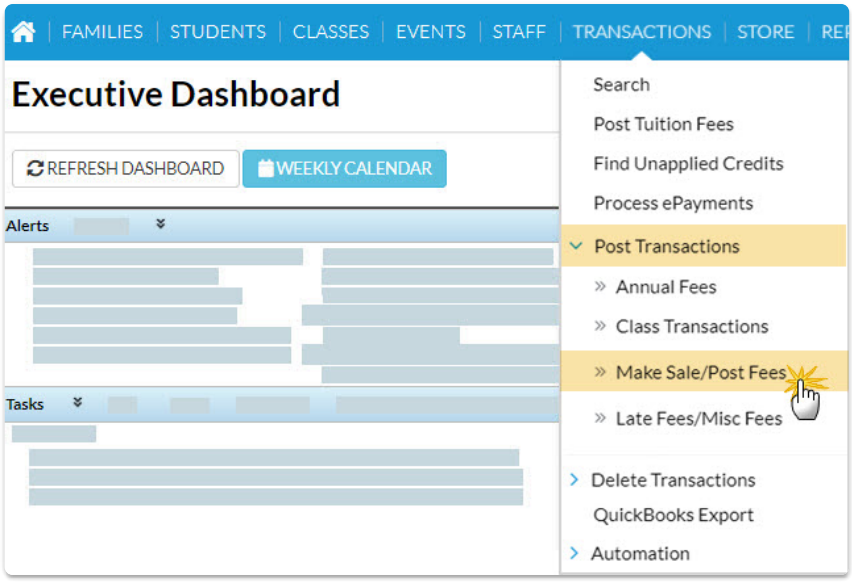


Post Other Fees

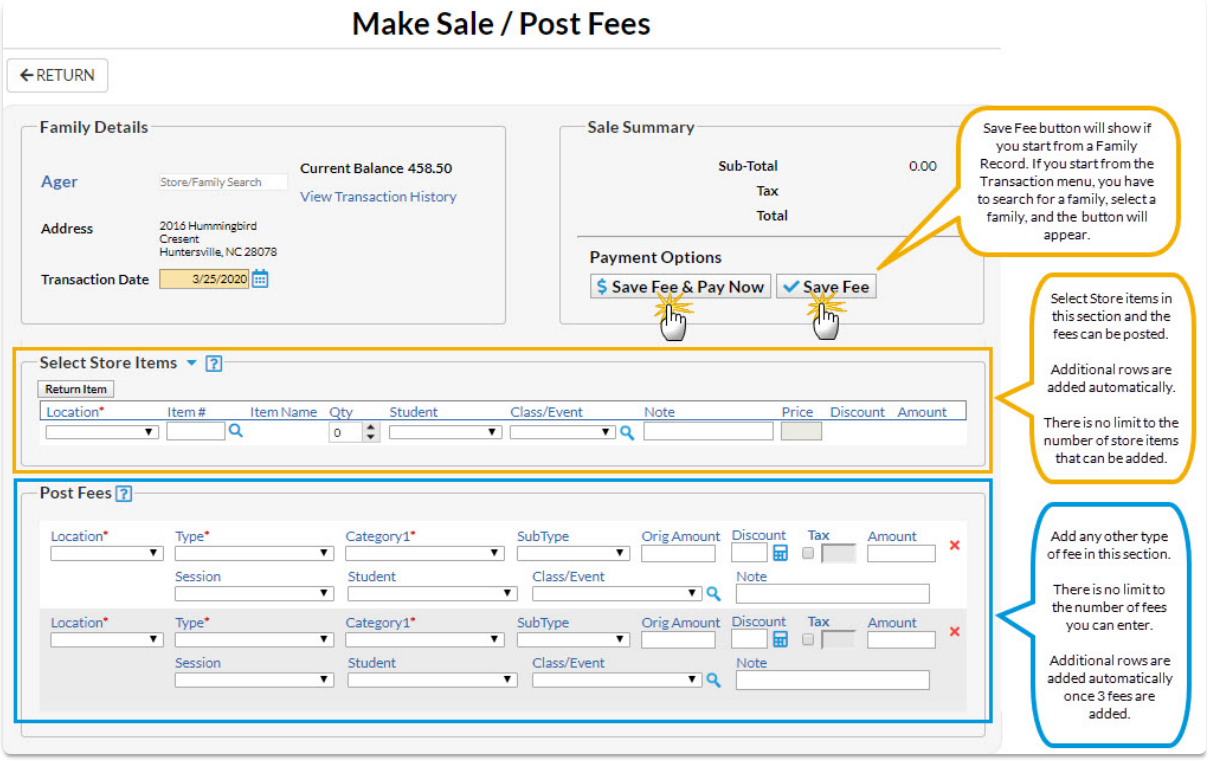
There are multiple ways to post additional fees (other than class fees) to a specific family:

1. Select one of the options listed in the table below to start the post fees procedure:

From a Family Record Go to *Families (menu) > All Families* and select the family you want to post a fee to or search for a family using the global search at the top of the page. Once the family page is open click the *Make Sale/Post Fees* button. *Proceed to step 2.*	
From All Families Go to *Families (menu) > All Families > select a Row menu* for a family. Click *Post Fees* in the drop-down menu. *Proceed to step 2.*	

From the Transactions Menu Go to *Transactions (menu) > Post Transactions > Make Sale/Post Fees*, this will open the *Make Sale/Post Fees* page. *Proceed to step 2.*	

2. Complete the **Family Details** section.
   - Search for a family name if you used the*Transaction* menu to access the page.
   - The family will automatically populate if you started from a*Family Record*.
   - Change the **Transaction Date** when applicable.
3. Complete the **Select Store Items** if you have any store fees to include. See**Make a Store Sale** for details.
4. Complete the **Post Fees** section.
   Note: You can add an unlimited number of fees. Additional rows will display after the third fee is added.



- **Location** if applicable.
- **Type** (Transaction).
- **Category1** (**Note:** *Category 1* is required if you have *Require Cat1 = Yes* (*Gear menu > Settings > General > Organization Defaults > Transaction Settings*). Jackrabbit always recommends you include a *Category 1*.
- **SubType** and enter the **Orig Amount**.
- Click the **Calculator** icon to enter a discount if applicable.
- Include tax by checking the **Tax** checkbox.
  Note: The tax rate is calculated using the *tax rate* you entered and saved under the *Gear (icon) > Settings > General > Organization Defaults (left menu) > Tax Settings*
- Choose a **Session** (optional, but highly recommended).
- Choose a **Student** (optional).
- Select a **Class/Event** from the drop-down if the fee is tuition-related, or click the **Magnifying Glass** (Search) icon to select a **Class/Event**. *If you add a class to this field, notice that the Category1 field adopts the Category1 assigned to that class. This is a safeguard to ensure the correct Category1 is used for the class tuition.*
- Add a **Note** (optional).

5. Click *either* the **Save Fee & Pay Now** button to save the fees and open a payment screen or the **Save Fee** button to save the fees without posting a payment.

Make a Store Sale

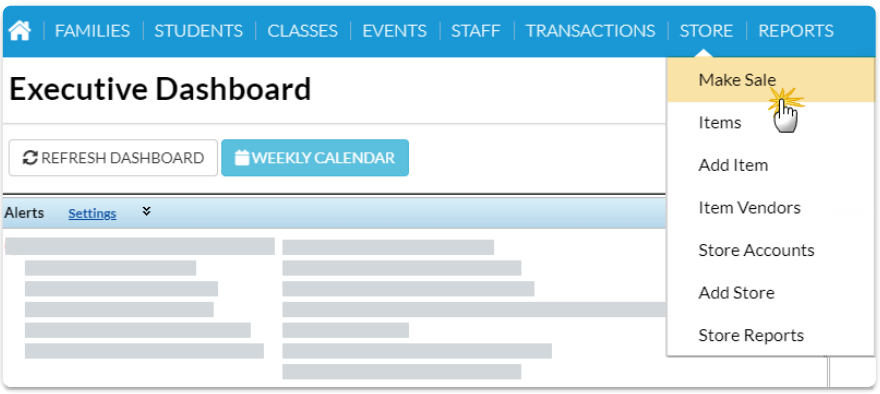
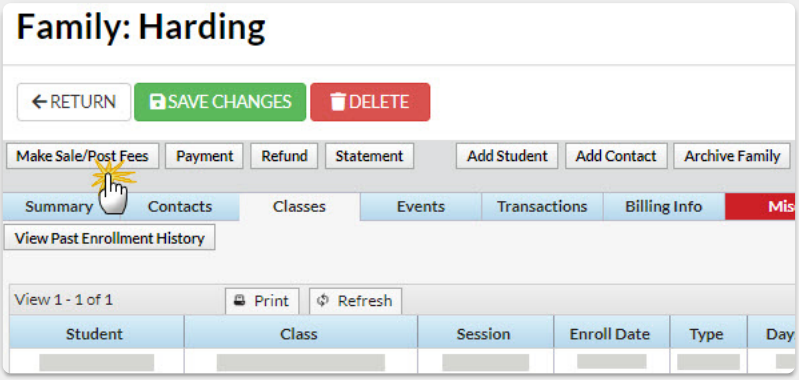
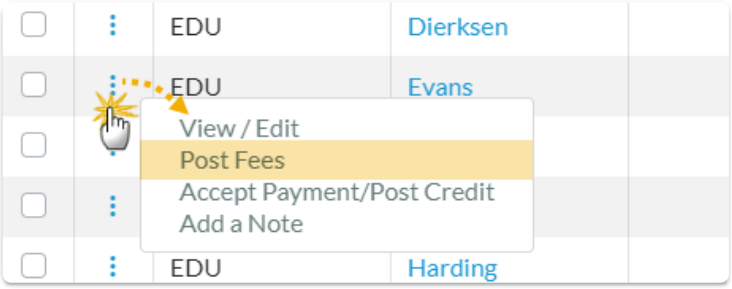
Jackrabbit gives you options when you want to make a sale from your store. You can post the fees to

the family's account or accept immediate payments at the time of sale for store item(s).

Make a Sale/Post Fees

There are multiple ways to make a sale in Jackrabbit: from the *Module (menu) > Store*, directly in a *Family* record, or in an *All Families* grid.

1. Go to the **Store** (menu) > **Make Sale** or alternatively, open a family record and click the **Make Sale/Post Fees** button or click on a family row menu (**Post Fees**) in the *Families (menu) > All Families*. Regardless of the access point, you start from, the procedure is the same.

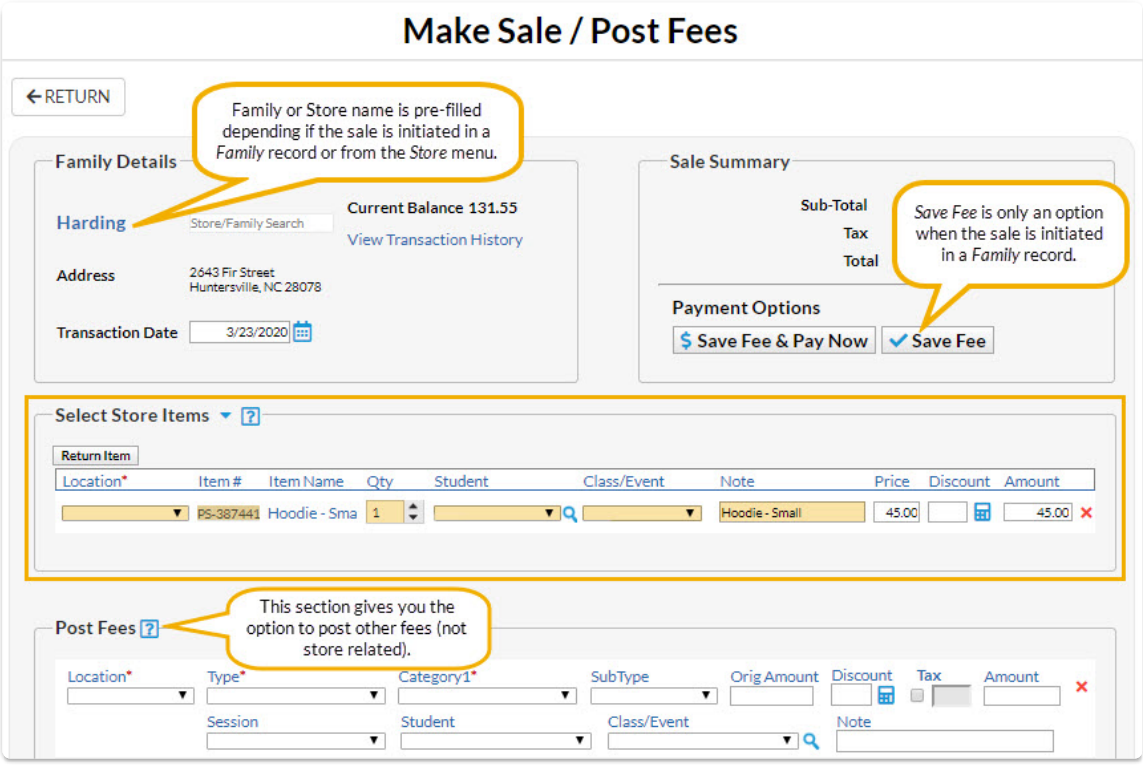
From the Store Menu This option allows you to choose a family or store.	
From a Family Record This option allows you to complete a transaction for a specific family.	
From All Families- *Row Menu* This option allows you to post a sale from a family row menu.	

2. Select a *Store* or *Family*.
   - **Store** - When you initiate your sale from the *Store (menu) > Make Sale*, the default store information is automatically added to the *Store Details* section. If you have multiple stores the default is set to the first store that was added to Jackrabbit, as identified by the Store ID that

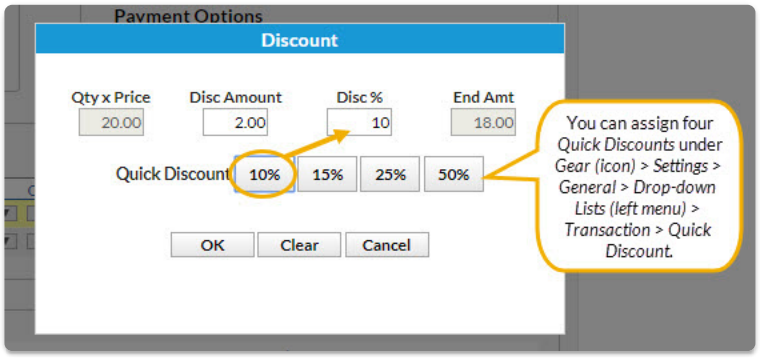
was created for it at that time. The Store ID is located on the *Summary* tab of the *Store* record, on the bottom right. See **Add Additional Store Accounts** for more information.

- **Family** - When you initiate your sale from a *Family* record > *Make Sale/Post Fees* button, or a *Family row menu*, the family's information is automatically added to the *Family Details* section.

  Note: If the sale is for a different store or family, start typing into the *Store/Family Search* field. Jackrabbit will search for matches after the first letter is typed. A list of matches displays and the correct one can be selected. All *Store* accounts are listed with 'Store:' in front of the name to differentiate between stores and families. Stores show at the top of the list. To assist in finding the correct family, each account displays the store/family name and billing contact's name and address.



3. **Select Store Items**. Enter the item number manually or use a barcode scanner. The item's price and details will appear on the transaction line when the item is selected. New rows are added automatically.
4. Select the **Quantity (Qty).** Use the up/down arrows to select the correct quantity. Once an item is selected the predetermined price will populate and the *Discount* and *Amount* fields become activated.
   Note: The tax is totaled in the *Sale Summary* section (top right).
5. Select **Student**, **Class/Event,** and add a **Note** if applicable.
6. Add a **Discount** for the store item or click on the calculator icon.
   - The calculator icon opens up a *Discount* window where you can enter the discount amount, discount percentage or click on a *Quick Discount* button. The *Quick discount* buttons will calculate the correct amount.
   - Go to the *Gear (icon) > Settings > General > Drop-down List Editor (left menu) > Transaction > Quick Discount* to add up to 4 discount amounts.



7. Add fees in the **Post Fees** section (bottom) that are not store-related when applicable.
8. Click on **Save Fee & Pay Now** or **Save Fee** to complete the transaction and move to payment options on the *Payment Transaction Entry* page.
    - *Save Fee* will only display when you initiate a sale from a *Family* record.
    - *Save Fee & Pay Now* button is visible if the transaction is for a Store account.
    - After clicking on *Save Fee & Pay Now*, if the family has a prior balance, you'll be asked if the full balance is being paid. If **Yes** is selected, then the full balance will appear as the payment amount. If **No** is selected, then only the amount of the transactions just entered will be the payment amount.

If you don't see the Payment Transaction Entry page after clicking a payment button, check your pop-up blocker and allow the pop-up.

Payment Options

You'll notice multiple payment options for store merchandise: cash, check, credit cards, and any other payment methods you accept for your business. The payment method drop-down list is created under the *Gear (icon) > Settings > General > Drop-down List Editor (left menu)> Transaction > Payment Method.*

Use Card/Acct on File - This will process the payment amount using the credit card/bank draft information on file (Family's *Billing Info* tab). This button is inactive for store accounts because they do not have credit cards on file.

Use New Card/Acct on File- Opens a pop-up window to enter the customer's credit card information.

When using a Family account, an option is offered to save the credit card information (if no card is currently on file) or replace the existing credit card (if a card is already on file).

If the Family Billing Contact has an email address, the email receipt confirmation is automatically sent to this email address unless the *Do Not Send* box is checked. To email confirmation to another email address, enter the email address(es) in the space provided.

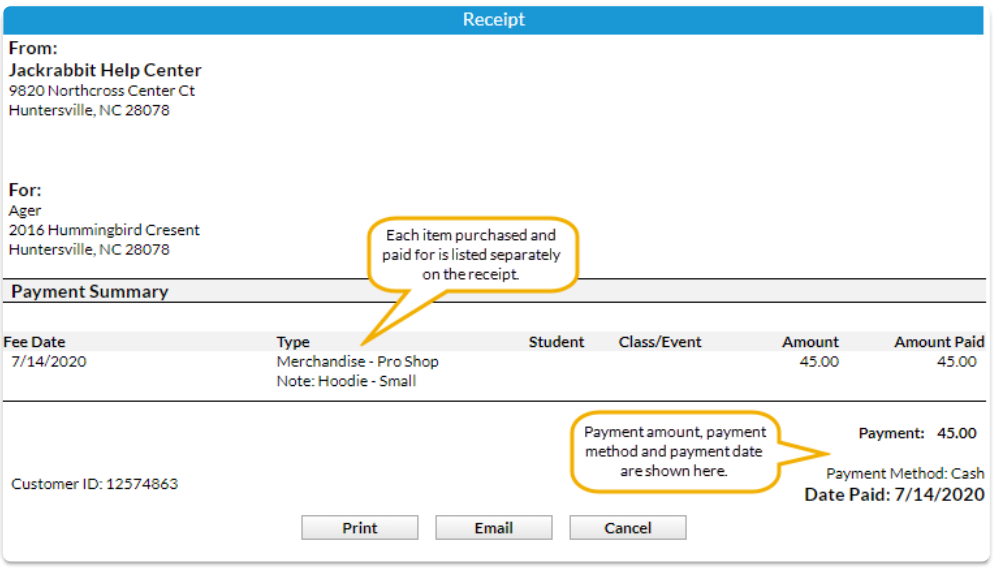
Use Terminal Payment - ***This option is ONLY available when you have an EMV Card Terminal set up for your business.*** The card can be swiped with a card swipe reader or the credit card information can be manually entered. When using the Store account, the card is processed for this transaction ONLY. No credit card information is saved.

Print a Receipt

On the *Payment Transaction Entry* page, check the *Receipt* box. The receipt lists all fees related to the payment. e-Commerce payments include the approval code, transaction id code, and last 4 digits of the card number. Payment notes also appear on the receipt.

Receipts that are emailed with credit card transactions only include the total amount of the transaction.

A sample cash receipt is shown below. You have the option to*Print* or *Email* the receipt from this window.



Frequently Asked Questions

Expand/Collapse All

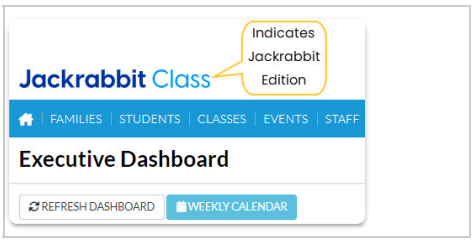
Practice - Post Fees to an Individual Family

Want to practice what you've just learned? Great!

- Go to **https://app.jackrabbitclass.com/jr4.0/Login** and log in with the credentials below for your

Jackrabbit edition.

- Go through some or all of the practice scenarios below as they apply to you.



Edition	User ID	Password
Cheer	LMSCheer	Training1
Class	LMSClass	Training1
Dance	LMSDance	Training1
Music	LMSMusic	Training1
Swim	LMSSwim	Training1

The Practice Database is refreshed each day at approximately 5:00 am Eastern Standard Time. Anything you enter will be erased at that time.

Post a fee to an individual family.

1. To post a fee to an individual family such as as Registration Fee, you can either:
    - Go to Families > All Families, search for the Family and click the Row Menu icon. Then select Post Fee.
    - Search for the Family by entering their last name (or the first few characters) in the "find a family..." Global Search Field. Locate the row for the family and click on Post Fees (link on far right) or click on the Last Name (link) to open the Family Record.
2. Select the Make Sale/Post Fees button.
3. In the Post Fees section, select the Transaction Type such as Registration (Debit) in the Type field.
4. Select a Category1.
5. Enter an amount in the Orig Amount field and complete the remaining fields if appropriate (Discount, Session, Student, Class/Event, Note).
6. Select either the Save Fee or the Save Fee & Pay Now button.

QUIZ - Lesson #6 - Post Fees to an Individual Family

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #6 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review

questions.

Quiz #6 - Post Fees to Individual Families

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
5	5	4	4	3

Return to Front Desk Staff Menu to continue to next lesson

Click here to provide feedback for this lesson

Optional Topics - Lesson #6

Review the following articles if they apply to your organization.

Student & Family Fixed Fees - Tuition

Jackrabbit gives you an option to create Fixed Fees to use when the tuition fee assigned to a class is not appropriate for a family or a specific student. These situations are considered unique or unusual and Fixed Fees should only be used under specific circumstances.

Business Scenario

Family Fixed Fees

A Family Fixed Fee is a useful option when the family's tuition amount doesn't follow the typical criteria, when you don't have consistent pricing for groups of families, or when a family receives a flat rate for unlimited classes. These situations are considered unique or unusual. Fixed Fees should only be used when the **class discount rule** and/or **family discount rules** do not provide a solution for the

student or family's discount situation.

When posting tuition fees, the Fixed Fee will post as a single fee transaction regardless of class tuition fees for any enrolled students and regardless of any multi-student or multi-class discounts.

Create a Family Fixed Fee

Expand/Collapse All

Manage Family Fixed Fees

Important Notes

If you want to completely exclude a family when using Post Tuition Fees (*Transactions* menu), select the **Omit Family from Transactions > Post Tuition Fees** setting on the *Billing Info* tab of their *Family* record.

Student Fixed Fees

When the tuition/discount calculation for a single student is too complex or just doesn't 'fit', use a Student Fixed Fee to set the tuition amount to a fixed amount. When a student has a Fixed Fee and you use the **Post Tuition Fees** feature (*Transactions* menu), this amount will be posted as a single tuition fee transaction, overriding class tuition fees and multi-student or multi-class discounts.

Create a Student Fixed Fee

Expand/Collapse All

Manage Student Fixed Fees

Important Notes

- If a family has a Family Fixed Fee and a student within the family has a Student Fixed Fee, both Fixed Fees will post when you use *Transactions > Post Tuition Fees* (two transactions).
- If a **Family Discount** is saved on a family's *Billing Info* page, it will be applied to the Student Fixed Fee.
- The **Additional Discount** (at the bottom of *Transactions > Post Tuition Fees*) is applied to a Student Fixed Fee.
- One student in a family can have a Fixed Fee while another does not. In this case, when using Post Tuition Fees, the Student Fixed Fee will post for one student, and the regular tuition rates and discounting will post for the other student.
- If you **post tuition fees with Parent Portal enrollments**, and the family has a current (not expired) Student Fixed Fee, no tuition will post. When the parent completes the portal enrollment and checks out, they are notified that no fees will be posted due to alternative fixed fee arrangements in place. Your organization will receive an email notification that a Fixed Fee in place for a student may need to be updated. Tuition fees must then be posted manually.

QUIZ - Optional - Lesson #6 - Post Fees to an Individual Family

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #6 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz - Optional - Lesson #6 - Post Fees to Individual Families Topics

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
7	7	6	5	4

Return to Front Desk Staff Menu to continue to next lesson

Click here to provide feedback for this lesson