

# Post Annual Fees

From the *Transactions (menu) > Post Transactions > Annual Fees* can be used to post any type of annual fee (registration, membership, insurance, etc.) to existing families or students.

You have the option to:

- **Post fee per Family** based on the *Family Registration Month*. A family's registration date is the date they registered with your facility, either via a Jackrabbit User (in-house) or through online registration; it is displayed on the *Summary* tab of their *Family* record.
- **Post fee per Student** based on the *Student Start Month*. A student's start date is the date they were first added to the *Family* record in Jackrabbit; it is displayed on the *Summary* tab of the *Student* record.
- **Post fee per Student per Class** based on the *Student Start Month*.

The screenshot shows the 'Post Annual Fees' interface with the following search criteria:

- ← RETURN
- Search Criteria (Who do you want to bill?)
- Search icons: Favorites, Save Favorites, Refresh
- Select Location: [Dropdown]
- Post fee per: Student Per Class
- Student Start Month (if Per Student): December
- Active (Enrolled) Only? Yes (Student is currently enrolled in any class.)
- Enroll Date From: [Calendar] Through: [Calendar]
- With Students Currently Enrolled in:
  - Class Session: Winter 2023
  - Category 1: [Dropdown menu with options: Annual Fees, Ballet, Cheer, Events, Gift Cards]
  - Category 2: [Dropdown menu with options: Advanced, Beginner, Competitive, Intermediate]
  - Category 3: [Dropdown]
- Classes that have a Registration Fee? [Dropdown]
- Membership Type: Recreational

A yellow callout box on the right side of the interface contains the text: "Based on this criteria, recreational families with actively enrolled students that started in December will have a fee posted for each Winter 2023 class the students are enrolled in."

Use the **Search Criteria** to narrow the list of people who will be included in the batch and have the fee

posted to their accounts.

Based on the criteria selections in the above example, a fee would be posted to families with a *Membership Type of Recreational* for each class their students who started in December and *actively enrolled* in for the *Winter 2023* session.

The **Transaction Details to Post** section lets you choose the type of fees you want to post and what details you want to apply to the transactions.

**Transaction Details to Post (What Fees do you want to post?)**  
Within this function, duplicate detection prevents the posting of duplicate fees based on the same transaction Date, Type and Amount (per Family, Student or Student-Class).

Transaction Date: 12/1/2022 📅

Transaction Type: \* Annual Membership (Debit) SubType: [v]

Student Fees: (used only if Post Per=Student) 1st Std. 2nd Std. 3rd Std. Maximum Fee per Family/Acct: 150.00 ?  
30.00 25.00 20.00 3rd student fee applies to 4th, 5th, etc. unless a Maximum Fee per Family/Acct is entered and reached.

Taxable?

Transaction Note: Annual fees for recreational classes - Dec renewal

Category 1: \* Annual Fees [v]

Session: Winter 2023 [v]

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By default, this function only excludes duplicate transactions for the same exact Date, Type and Amount. But you can also exclude duplicate transactions within a date range (ex. entire month) using the fields below.

Duplicate Check Date From: 11/1/2022 📅 Through: 12/31/2022 📅

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Optionally, Advance Registration Date By 1 year? Yes [v] ?

[Preview Fees](#)

If you are posting per family, you will enter the fee amount for a family. If you are posting per student or per student per class, you will enter the fees for the first student, second student, and third student. The fee for the third student is used for the fourth, fifth, etc. students in the family unless a maximum fee per family is designated. If a maximum fee exists, the fee will post for each student until that maximum is reached. If the maximum is reached, it will be posted to the family in one transaction vs posting each student amount individually.

By default, Post Annual Fees will exclude transactions for a family with previously posted fees with an exact match on:

- Transaction Date
- Transaction Type
- Transaction Amount (per Family, per Student, or per Student-Class)

If you have chosen to post fees per student or by student per class, the transaction must also match the student name (this would mean that the originally posted transaction would have to have the student listed in the student section of the transaction).

Entering dates in the Duplicate Check Date From/Through fields allows you to also exclude duplicate fees for a family/student for a specified date range instead of the exact transaction date. This searches the date range and matches the type, amount, per-student fees, and student name.

If you would like the Family Registration Date or Student Start Date to act as a 'due date' for next year's fees, select Yes to Optionally, Advance Registration Date By 1 year. **Note: To keep a record of their actual registration/start date, consider adding those dates to the Notes field on the Misc tab.**

You can preview the fees before you commit to posting them!

The Preview Annual Fees page provides transaction counts and the option to remove a family, or student, from the batch. The fees are not posted to families until the **Post Fees** button is selected.

### Preview Annual Fees

← RETURN **✓ POST FEES** X CANCEL

**Preview Results**

Process created 3 transaction(s) based on criteria.  
3 transaction(s) are set to post.

Preview Counts  
Family/Accounts: 1  
Student: 2

View 1 - 3 of 3 Print Export Refresh

| Date      | Family | Student     | Class  | Trans Type        | Orig Amt | Tax  | Amount | Balance | Notes  | Cat1        | Session     | Entered By | All                                 |
|-----------|--------|-------------|--|-------------------|----------|------|--------|---------|--|-------------|-------------|------------|-------------------------------------|
| 12/1/2022 | Ager   | David Ager  | <a href="#">Tumbling Intermediate - Tues 7pm</a> | Annual Membership | 30.00    | 0.00 | 30.00  | 30.00   | Annual fees for recreational classes - Dec renewal | Annual Fees | Winter 2023 | SOlson     | <input checked="" type="checkbox"/> |
| 12/1/2022 | Ager   | Barbie Ager | <a href="#">Acro - Mon 6pm</a>                   | Annual Membership | 25.00    | 0.00 | 25.00  | 30.00   | Annual fees for recreational classes - Dec renewal | Annual Fees | Winter 2023 | SOlson     | <input checked="" type="checkbox"/> |
| 12/1/2022 | Ager   | Barbie Ager | <a href="#">Tumbling Beginner - Thurs 6pm</a>    | Annual Membership | 20.00    | 0.00 | 20.00  | 30.00   | Annual fees for recreational classes - Dec renewal | Annual Fees | Winter 2023 | SOlson     | <input checked="" type="checkbox"/> |

Uncheck to leave a student or family out of the batch of fees.



If annual fees are posted in error, use [Transactions > Delete Transactions](#) to delete. See [Delete Transactions](#) for more information on deleting a fee.