

# Assign a Family Discount (Billing Info Tab)

When you use Post Tuition Fees (from the *Transactions* menu), you can have a Family Discount applied to the tuition fees. This is often used for volunteers, staff, etc. that are given a discount over and above any **multi-class** or **multi-student** discounts that you offer.

The Family Discount, which can be a dollar amount or a percentage, is applied to the tuition amount **after** your other discounts have been calculated and applied.

The screenshot shows the 'Family: Ager' record in a software interface. At the top, there are buttons for 'RETURN', 'SAVE CHANGES', and 'DELETE'. Below these are several tabs: 'Make Sale/Post Fees', 'Payment', 'Refund', 'Statement', 'Add Student', 'Add Contact', 'Archive Family', 'Family Name', 'Email', 'Push Notification', 'Email Schedules', and 'Merge Family'. The 'Billing Info' tab is selected and highlighted. Underneath, there are sub-tabs: 'Summary', 'Contacts', 'Classes', 'Events', 'Transactions', 'Billing Info', 'Misc', and 'Notes (0)'. The 'Billing Info' sub-tab is active, showing fields for 'Billing Delivery' (dropdown), 'Membership Type' (ClubMemb), 'Billing Contact' (Holly Ager), 'ePayment Method' (Credit Card), 'ePayment Schedule' (AutoPay), and 'Address' (2016 Hummingbird Crescent, Huntersville, NC 28078, Email hollyager41@gmail.com). Below this is a section titled 'Discounts and Fixed Fees (only applied when using Post Tuition Fees and Post Tuition Fees by Total Hours)'. It contains a 'Family Discount Rule' dropdown, a 'Family Discount' field with the value '10', a 'Discount Type' dropdown set to 'Percent', an 'Exp Date' field with the value '12/31/2020', and a 'Note' field with the text 'Military family'. There is also a 'Family Fixed Fee' field and a 'Fixed Fee Category1' dropdown.

## Add or Update a Discount to an Individual Family

1. Select the **Billing Info** tab in the *Family* record.
2. Enter a discount in the **Family Discount** field (the discount can be an amount or a percentage).
3. Select the **Discount Type** (Amount or Percentage).
4. Assign an Exp Date (optional).
5. Add a **Note** (optional).
6. Click **Save Changes**.

## Add or Update a Discount for a Group of Families

1. Go to the **Families** (menu) > **All Families** and filter as needed.
2. Select all the families in the grid by leaving the 1st column checkboxes blank or check the 1st column checkboxes for the families you would like to update in a group.
3. Click the **More** (icon) ⓘ > **Family Discount**.
4. Enter **Amount**, **Expires** (optional expiration date), and select the **Discount Type** from the drop-down list. Use the toggle to remove any family discounts.
5. Click **Update**. All selected families will have their Family Discount updated.

## Important to Note

- Family Discounts are **not** deducted from Family Fixed Fees.

- Family Discounts **are** deducted from Student Fixed Fees. The discount is posted after all Student Fixed Fees are entered. Example: A family has two students and both students have a Fixed Fee of \$100. The Family Discount is \$10.00. Both Student Fixed Fees are posted at \$100 each. The discount of \$10 is subtracted from the total ( $\$100 + \$100 - \$10 = \$190$ ).
  - Family Discounts are **only** applied when using **Post Tuition Fees** from the *Transactions* menu. Parent Portal enrollments and enrollments done from within Jackrabbit do not include the Family Discount.
  - You can set the Family Discount to expire on a specified date. After an expiration date has passed, the discount will be ignored when posting tuition fees.
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