

Add a Bank Account to a Family

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Watch a (2:07) video tutorial on adding credit cards and bank accounts



Once a bank account number has been entered into Jackrabbit, only the last four digits are visible to users. It is NOT possible to see all digits of a bank account number due to PCI Compliance regulations.

To add a bank account to a Family record:

1. In the *Family* record, go to the **Billing Info** tab.
2. Add the **Bank Name**.
3. Add the **Bank Transit #** and **Institution ID**.
4. Select the **Edit Bank Account Info** button.
5. Enter **New Bank Acct#** and **Save**.
6. Choose an **Account Type** from the drop-down list.
7. Add an **Account Name** (Name on the Account).
8. On the *Billing Info* tab, set **ePayment Method** to **Bank Account**. **Save Changes**.

The address associated with the bank account information is taken from the contact who has **Billing Contact** set to **Yes**.



separately.

The Family record MUST have a telephone number in the Home or Primary Phone field on the Summary tab in order for the Bank Draft to be accepted by the gateway. This phone number is not populated when the Contact phone number is added, it must be added

Family: Clements

[Return](#) [Save Changes](#) [Delete](#)

Make Sale/Post Fees	Payment	Refund	Statement	Add Student	Add Contact	Archive Family	Family Name	Email	Text	Email Schedules
Merge Family										
Summary	Contacts	Classes	Events	Transactions	Billing Info	Misc				
Billing Delivery: <input type="text"/>		Membership Type: <input type="text"/>		Billing Contact: Alane Clements						
ePayment Method: Bank Account		ePayment Schedule: <input type="text"/>		Address: 1809 Santa Monica Huntersville, NC 28078 Email: aclements@email.com						
Credit Cards										
Add Card <input type="text"/>										
<i>This family has no credit cards on their account. Click 'Add Card' to allow credit card payments</i>										
Bank Account										
Bank Name: Wells Fargo		Bank Transit # (5-digits): 00253		Institution ID (3-digits): 004 <input type="text"/>						
Bank Account #: *****7413		Edit Bank Account Info		Account Type: <input type="text"/>		Account Name: Alane Clements (Name on the Account)				



*If your organization accepts both credit cards & bank accounts, and a family has both a credit card and bank account on file on the Billing Info tab of their Family Record, the **ePayment Method** field determines whether the bank account or the credit card will be submitted for payment.*

If you are using Online Registration, you can require your families to enter bank account information at the time of registration. Learn more about [Online Registration](#).

If you allow families to add or edit bank account information while logged into their portal, see [Parent Portal ePayment Settings](#) for details on adding and editing bank accounts in the Parent Portal.