

Process a Single Bank Account Draft

Last Modified on 11/03/2020 12:29 am EST

In order to process a single bank account payment:

- ePayments must be activated for your database.
- The family must have ePayment=Bank Draft saved to their *Billing Info* tab.
- The family must have bank account details saved to their *Billing Info* tab. (See [Manage Credit Cards & Bank Accounts in the Family Record](#) section.
- The Home or Primary Phone field on the *Family* record > *Summary* tab must be contain a phone number.

Use the steps below to submit a single bank account for payment:

1. Use the Global Search field to locate the family.
2. Click the **Payment/Credit** button on the Family page.
3. In the *Payment/Credit Transaction Entry* screen, the *Trans Date* defaults to the current date (today's date). Change if needed.
4. *Pmt Type* defaults to *Payment (Credit)* and should not be changed.
5. It is not necessary to enter a *Method* of payment. This will be auto-assigned based on the payment method used, eg. Visa, Mastercard or Bank Account.
6. Enter an **amount** in the *Pmt Amount* field.
7. To apply the payment to the oldest fees first, click **Apply Payment to Oldest Fees First**
8. To apply the payment to specific fees, click the **Apply Amt** field for the specific fee to be paid. When you click the field, Jackrabbit will pre-fill the amount in; however this can be edited to a different amount when applicable.
9. Click the **Use Card/Acct on File** button.
10. The *Post ePayment* box opens. Verify the information and click **Submit ePayment**.
11. *Bank Account transactions are always initially approved as they don't process in real time. Bank account transactions can take up to 7-10 days to complete 'settlement' and can be declined during this time. Be sure to confirm a bank account transaction with your bank records. For more information, see*

Reconcile Bank Drafts with Bank Statements

12. This information is recorded on the Family's *Transactions* tab, and the family balance is updated accordingly.

For details on processing groups of bank accounts at one time, see [Process ePayments for Multiple Families](#).
