

Transaction Subtypes

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Transaction Subtypes further define and expand a *Transaction Type*. For example, if the *Transaction Type* is *Tuition (Debit)*, the *Transaction Subtype* might be the names of each month (January, February, March, etc.)

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu).
2. Click **Transaction Subtypes** from the *Transaction* section in the left menu.
3. Click **Add Row** to add a new *Transaction Subtype* and enter the name.
4. Click **Save Changes**.



Check the *Hide from users* checkbox next to a *Transaction Subtype* to hide it from all of the drop-down lists in your database. Deleting drop-down values in Jackrabbit is not recommended because it impacts your ability to filter for that value in your reports.

Example of a *Transaction Type* & *Subtype* on a Family's **Transactions** tab.

Family: Borner

← 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

View Transaction History

View Unapplied Credits & Unpaid Fees

Current Balance 0.00

Legend: Fee/Charge Payment/Credit Unpaid Fee Unapplied Credit

Last 20 (Most Recent) Transactions

View 1 - 20 of 20

Print

Refresh

6 columns hidden

Show/Hide Columns

Save Columns

Restore Columns

	Date	Type	Sub Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/Event
	5/1/2019	Tuition Fee	May	82.50	0.00	0.00	May, Prorated=3.75, Base Fee=75.00	Check 3875		10/1/2018	Tumbling	2019 Spring	Chloe Borner	Advanced Tumbling