

# Post an Individual Payment

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In Jackrabbit, a *Payment* is considered a credit on a family account. A payment reduces the family balance. Payments should always be applied (linked) to specific fees. Fees that are not linked to a payment show a pink date paid field on a family's *Transactions* page. A full explanation of fee linking is provided in [Jackrabbit Accounting \(Linking Fees and Payments\)](#).

An individual payment can be posted to a family using the **Payment/Credit** button which is located on every family page. *List Active Families* from the *Families* menu offers a *Pay* link for each family that can also be used to generate an individual payment.

Both the *Payment/Credit* button on a family's page and the *Pay* links in *Family > List Active Families* open the *Payment Transaction Entry* page. When opened, this page displays all of the fees that a family still owes (that have a pink date paid on their *Transactions* tab). Those fees may be partially paid or completely unpaid.

## Payment/Credit Transaction Entry

Cash, Checks, Other Credits

ePayments in Jackrabbit

Family/Acct Herbster  
490 Madison Avenue  
Cornelius, NC 28031  
Home Phone

Trans Date: 6/24/2020 ☐ Receipt

Transaction Type: Payment Subtype: Method:

Note: Chk#:

Balance 276.29

Payment: 276.29

Applied Amount: 0.00

Unapplied Amount 276.29

All Unpaid Charges/Fees

Date	Type Subtype	Note	Student	Class/Event	Orig Amt	Discount	Tax	Amt	Unpaid	Apply Amt
06/17/2020	Merchandise	Bottled Water	Callihan Herbster		1.50	0.00	0.00	1.50	1.50	0.00
06/17/2020	Merchandise	Logo T-Shirt - Medium	Callihan Herbster		9.00	0.00	0.79	9.79	9.79	0.00
06/01/2020	Tuition Fee	June, Class=5.00hrs, Student=5.00hrs/460	Callihan Herbster	Tap - Adv - M-F 3pm	250.00	0.00	15.00	265.00	265.00	0.00

To record an individual payment:

1. Locate the family you would like to post the payment:
  - Go to **Families** (menu) > **All Families** > select the row menu: for the family >

click **View/Edit** to open the *Payment/Credit Transaction Entry* page.

- Go to the **Families** (menu) > **List Active Families** > and click the **Pay** link to open the *Payment/Credit Transaction Entry* page. The *Trans Date* defaults to the current date. If necessary, change the **Trans Date**.
2. Check to **Print Receipt** if required.
  3. The *Transaction Type* defaults to *Payment*. This should only be changed for non-monetary payments, for example a gift certificate. See [Post a Non-Monetary Credit](#) for more information.
    - If your organization uses [Transaction Subtypes](#) you can opt to assign a **Subtype** to the payment.
    - If the customer is paying with cash or check choose a **Method** from the drop down list. For ePayments (credit card/bank draft) the **Method** is determined by the type of card or account used. *Note: Setting the Method to Bank Draft, Visa, Mastercard, etc. will not process the payment as an ePayment, it will only record the transaction. Use either the Use Card/Acct on File or the Use New Card button to send an ePayment to the gateway for processing.*
  4. Enter a **Note** (optional).
  5. Enter a **Chk#** if applicable.
  6. The **Payment** field will default to the family's account balance. Update the amount if the family is not paying the full balance.
  7. Apply the payment to the fees being paid using one of these options:
    - Click the **Apply Amt** column next to a fee to apply the payment to specific fees. Edit the amount if not paying the entire fee. The *Applied Amount* and *Unapplied Amount* will update for each fee selected.
    - Click the **Apply to Newest Fees First** to apply the payment starting with the newest fees and working backward until the payment amount is fully applied.
    - Click the **Apply to Oldest Fees First (within last 12 months)** to apply the payment starting from the oldest fees within one year and working forward until the payment amount is fully applied.
    - Click the **Apply to Oldest Fees First** to apply the payment to the oldest fees first (including those beyond 1 year) and work forward until the payment amount is fully applied.
  8. Select one of the four button options to complete the payment according to the family's method of payment:
    - **Save Payment** to enter the payment on the family's *Transactions* tab. This is generally used for check and cash payments.
    - **Save & Make Another Payment** to save the payment and add another payment for the same family.
    - **Use Card/Acct on File** to create an ePayment (credit card or bank account draft) using the card/bank account information stored on the family record. See [Process a Single Credit Card](#) and [Process a Single Bank Account Draft](#) for more information on processing ePayments.
    - **Use New Card** to manually enter a credit card # or use a card swiper to initiate a credit card ePayment. See [Process a Single Credit Card](#) for more information.



*In order to process ePayments in Jackrabbit you must have agateway and merchant account with one of our Payment Partners. If you are not set up for ePayments, you will receive an error message when you attempt to submit the transaction that states you have not activated this feature. See [ePayments](#) category for details on contacting a Payment Partner and setting up ePayments functionality.*

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