

Make a Store Sale

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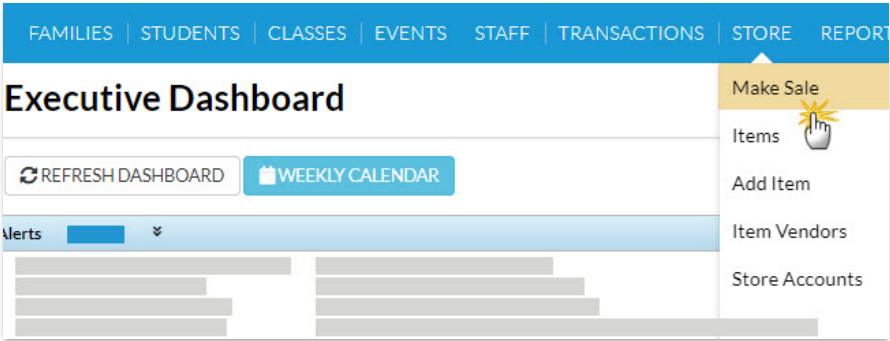
Watch a (2:23) video tutorial on Making a Store Sale

Jackrabbit gives you options when you want to make a sale from your store. You can post the fees to the family's account or accept immediate payments at the time of sale for store item(s).

Make a Sale/Post Fees

There are multiple ways to make a sale in Jackrabbit: from the *Module (menu) > Store*, directly in a *Family* record, or in an *All Families* grid.

1. Go to **Store (menu) > Make Sale** or alternatively, open a family record and click the **Make Sale/Post Fees** button or click a family row menu **Post Fees** in the *Families (menu) > All Families*. Regardless of the access point, you start from, the procedure is the same.

<div>From the Store Menu</div> <div>This option allows you to choose a family or store.</div>	 <p>The screenshot shows the 'Executive Dashboard' with a top navigation bar containing 'FAMILIES', 'STUDENTS', 'CLASSES', 'EVENTS', 'STAFF', 'TRANSACTIONS', 'STORE', and 'REPORT'. The 'STORE' menu is open, displaying options: 'Make Sale' (highlighted with a yellow background and a hand cursor icon), 'Items', 'Add Item', 'Item Vendors', and 'Store Accounts'. Below the navigation bar, there are buttons for 'REFRESH DASHBOARD' and 'WEEKLY CALENDAR', and a section for 'Alerts' with a dropdown arrow.</p>
<div>From a</div>	

Family Record

This option allows you to complete a transaction for a specific family.

The screenshot shows the 'Family: Harding' record page. At the top, there are buttons for 'RETURN', 'SAVE CHANGES', and 'DELETE'. Below these are tabs for 'Make Sale/Post Fees', 'Payment', 'Refund', 'Statement', 'Add Student', 'Add Contact', and 'Archive Family'. A 'Summary' tab is selected, and a hand icon points to the 'Make Sale/Post Fees' button. Other tabs include 'Contacts', 'Classes', 'Events', 'Transactions', 'Billing Info', and 'Mis'. A 'View Past Enrollment History' link is also present. At the bottom, there is a table with columns: Student, Class, Session, Enroll Date, Type, and Day. The table shows 'View 1 - 1 of 1' and has 'Print' and 'Refresh' buttons.

From All Families

Row Menu

This option allows you to post a sale from a *Family row menu*.

The screenshot shows a table with columns: Student, Class, Session, Enroll Date, Type, and Day. The table lists several families: Dierksen, Evans, and Harding. A hand icon points to the 'Make Sale/Post Fees' button in the 'Make Sale/Post Fees' column. A context menu is open, showing options: 'View / Edit', 'Post Fees', 'Accept Payment/Post Credit', and 'Add a Note'. The 'Post Fees' option is highlighted.

2. Select a Store or Family.

- **Store** - When you initiate your sale from the *Store* menu > *Make a Sale*, the default store information is automatically added to the *Store Details* section. If you have multiple stores the default is set to the first store that was added to Jackrabbit, as identified by the Store ID that was created for it at that time. The Store ID is located on the *Summary* tab of the *Store* record, on the bottom right. See [Add Additional Store Accounts](#) for more information.
- **Family** - When you initiate your sale from a *Family* record > *Make Sale/Post Fees* button, or a *Family row menu*, the family's information is automatically added to the *Family Details* section.

Note: If the sale is for a different store or family, start typing into the *Store/Family Search* field. Jackrabbit will search for matches after the first letter is typed. A list of matches displays and the correct one can be selected. All *Store* accounts are listed with 'Store:' in front of the name to differentiate between stores and families. Stores show at the top of the list. To assist in finding the correct family, each account displays the store/family name and billing contact's name and address.

Make Sale / Post Fees

[← RETURN](#)

Family Details

Harding Store/Family Search

Address 2643 Fir Street
Huntersville, NC 28078

Transaction Date 3/23/2020

Current Balance 131.55
[View Transaction History](#)

Sale Summary

Sub-Total
Tax
Total

Payment Options

[\\$ Save Fee & Pay Now](#) ☒ [Save Fee](#)

Select Store Items ?

[Return Item](#)

Location*	Item #	Item Name	Qty	Student	Class/Event	Note	Price	Discount	Amount
	PS-387441	Hoodie - Sma	1			Hoodie - Small	45.00		45.00

Post Fees ?

Location* Type* Category1* SubType Orig.Amount Discount Tax Amount

Session Student Class/Event Note

3. **Select Store Items.** Enter the item number manually or use a barcode scanner. The item's price and details will appear on the transaction line when the item is selected. New rows are added automatically.
4. Select the **Quantity (Qty)**. Use the up/down arrows to select the correct quantity. Once an item is selected the predetermined price will populate and the *Discount* and *Amount* fields become activated.
Note: The tax is totaled in the *Sale Summary* section (top right).
5. Select **Student**, **Class/Event**, and add a **Note** if applicable.
6. Add a **Discount** for the store item or click on the calculator icon.
 - The calculator icon opens up a *Discount* window where you can enter the discount amount, discount percentage or click on a *Quick Discount* button. The *Quick discount* buttons will calculate the correct amount.
 - Go to *Tools > Edit Settings > Edit Drop-Down Lists > Transaction > Quick Discount* to add up to 4 discount amounts.

Payment Options

Discount

Qty x Price	Disc Amount	Disc %	End Amt
20.00	2.00	10	18.00

Quick Discount **10%** 15% 25% 50%

OK Clear Cancel

You can assign four Quick Discounts under *Tools > Edit Settings > Edit Drop-Down Lists > Quick Discount*.

7. Add fees in the **Post Fees** section (bottom) that are not store-related when applicable.
8. Click on **Save Fee & Pay Now** or **Save Fee** to complete the transaction and move to payment options on the *Payment Transaction Entry* page.
 - *Save Fee* will only display when you initiate a sale from a *Family* record.
 - *Save Fee & Pay Now* button is visible if the transaction is for a *Store* account.
 - After clicking on *Save Fee & Pay Now*, if the family has a prior balance, you'll be asked if the full balance is being paid. If **Yes** is selected, then the full balance will appear as the payment amount. If **No** is selected, then only the amount of the transactions just entered will be the payment amount.



*If you don't see the *Payment Transaction Entry* page after clicking a payment button, check your pop-up blocker and allow the pop-up.*

Payment Options

You'll notice multiple payment options for store merchandise: cash, check, credit cards, and any other payment methods you accept for your business. The payment method drop-down list is created in *Tools > Edit Settings > Drop-Down Lists > Transaction > Payment Method*.

ePayments in Jackrabbitt

Use Card/Acct on File - This will process the payment amount using the credit card/bank draft information on file (*Family's Billing Info* tab). This button is inactive for store accounts because they do not have credit cards on file.

Use New Card/Acct on File - Opens a pop-up window to enter the customer's credit card information.

When using a *Family* account, an option is offered to save the credit card information (if no card is currently on file) or replace the existing credit card (if a card is already on file).

If the *Family Billing Contact* has an email address, the email receipt confirmation is automatically sent to this email address unless the *Do Not Send* box is checked. To email confirmation to another email address, enter the email address(es) in the space provided.

Use Terminal Payment - *This option is ONLY available when you have an EMV Card Terminal set up for your business.* The card can be swiped with a card swipe reader or the credit card information can be manually entered. When using the *Store* account, the card is processed for this transaction ONLY. No credit card information is saved.

Print a Receipt

On the *Payment Transaction Entry* page, check the *Receipt* box. The receipt lists all fees related to the

payment. e-Commerce payments include the approval code, transaction id code, and last 4 digits of the card number. Payment notes also appear on the receipt.

Receipts that are emailed with credit card transactions only include the total amount of the transaction.

A sample cash receipt is shown below. You have the option to *Print* or *Email* the receipt from this window.

Receipt

From:
Jackrabbit Help Center
9820 Northcross Center Ct
Huntersville, NC 28078

For:
Ager
2016 Hummingbird Crescent
Huntersville, NC 28078

Payment Summary

Fee Date	Type	Student	Class/Event	Amount	Amount Paid
7/14/2020	Merchandise - Pro Shop Note: Hoodie - Small			45.00	45.00

Customer ID: 12574863

Payment amount, payment method and payment date are shown here.

Payment: 45.00
Payment Method: Cash
Date Paid: 7/14/2020

Print

Email

Cancel