

# Add a Bank Account to a Family

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



*regulations.*

*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*

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**.



*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 separately.*

Jackrabbit

### 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:  Membership Type:  Billing Contact: [Alane Clements](#)

ePayment Method: **Bank Account** ePayment Schedule:  Address: 1809 Santa Monica  
Huntersville, NC 28078  
Email: [aclements@email.com](mailto:aclements@email.com)

Credit Cards

[Add Card](#)

*This family has no credit cards on their account. Click 'Add Card' to allow credit card payments*

Bank Account

Bank Name: Wells Fargo Bank Transit # (5-digits): 00253 Institution ID (3-digits): 004

Bank Account #: \*\*\*\*\*7413 [Edit Bank Account Info](#) Account Type:  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.

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