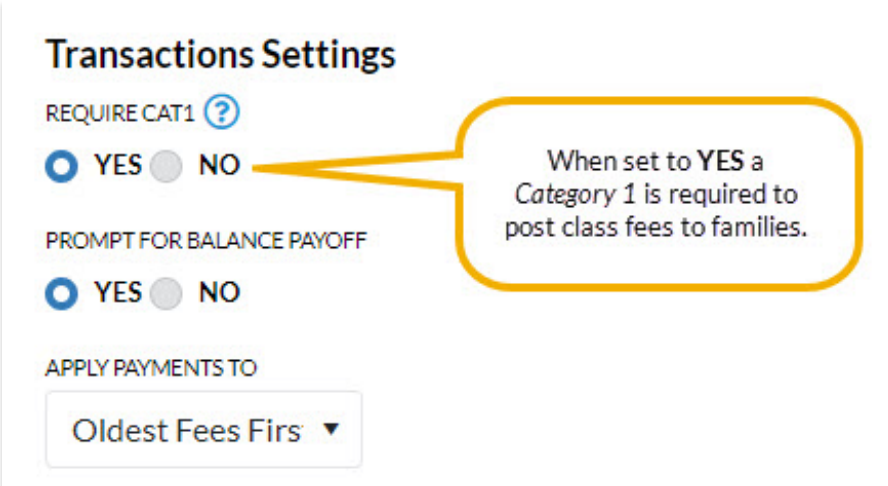


Transaction Settings

Last Modified on 06/05/2019 8:45 pm EDT

In the Organization Default Settings, your **Transaction Settings** determine the defaults for when you are posting fees and recording payments.



Transactions Settings

REQUIRE CAT1 ?

YES NO

PROMPT FOR BALANCE PAYOFF

YES NO

APPLY PAYMENTS TO

Oldest Fees First ▼

When set to YES a Category 1 is required to post class fees to families.

Define your organization's Transaction Settings from **Tools > Edit Settings > Organization Defaults > Transactions Settings**.

Require Cat1	We recommend you set this default to YES . When set to Yes, any attempts to post a fee without a Category 1, a pop-up message will advise that a Category 1 is required. The User will not be able to save the transaction until a Category 1 is assigned.
Prompt for Balance Payoff	Set to Yes to prompt the Jackrabbit User to ask the family to pay their full account balance when accepting a payment with the <i>Save Fee & Pay Now</i> button in the <i>Make Sale/Post Fees</i> window. When Yes is selected the <i>Payment Transaction Entry</i> window will auto-fill the <i>Payment</i> field with the full account balance instead of only the amount of the fee just posted. The User is able to edit the <i>Payment</i> field if Yes is selected in error.

	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <div style="background-color: #0070c0; color: white; text-align: center; padding: 2px;">Pay Full Balance</div> <p style="margin: 0;">Family had a previous balance of \$71.28. Do you want to pay the full balance?</p> <p style="text-align: center; margin: 0;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div>
<p>Apply Payments To</p>	<p>This setting determines what order payments are applied to fees as a default when making individual payments (in the Payment Transaction Entry window) or batch ePayments (in Process Credit Cards/Bank Accts).</p> <p>Choose from 3 options to set the default for how payments are applied:</p> <ul style="list-style-type: none"> ● <i>Newest Fees First</i> - Most recent unpaid fees to oldest unpaid fees on the family's account. ● <i>Oldest Fees First (within last 12 months)</i>- Oldest unpaid fees dated within 12 months to most recent unpaid fees. ● <i>Oldest Fees First</i> - Oldest unpaid fees on the family's account to most recent unpaid fees.



For any payment, fees that are selected by default according to the Apply Payments to setting can be edited by the User in the Payment Transaction Entry screen.