

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. Point to **Tools** in the menu bar, and click **Edit Settings**.
2. In the left menu, click **Drop-down Lists**.
3. Click **Transaction Sub Types** from the *Transaction* section in the left list of choices.
4. Click **Add Row** to add a new *Transaction Subtype* and enter the name.
5. **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 Help ?

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