Transaction Type Last Modified on 07/24/2020 10:53 am E

Transaction Types are used to properly record the type of fee and payment transaction. They are used for reporting and for searching information in Jackrabbit. Credit transactions will decrease a family's balance and Debit transactions will increase the balance.

Some Transaction Type fields have already been included for you. Several are reserved for Jackrabbit functionality and can not be changed or deleted.

The pre-assigned *Transaction Types* are a great starting point; but it's easy to create more.

- 1. Point to Tools in the menu bar, and clickEdit Settings.
- 2. In the left menu, click Drop-down Lists.
- 3. Click Transaction Types from the Transaction section in the left list of choices.
- 4. Click Add Row to add a new Transaction Type.
- 5. Enter the name of the Transaction Type and select Debit or Credit from the drop-down list. This tells Jackrabbit whether the transaction should debit or credit a family's account.
- 6. Click Delete to delete a Transaction Type. Save Changes. Note: Deleting a drop-down value can affect your historical reporting. Review the Frequently Asked Question before editing or deleting a drop-down value).



Check the Hide from users checkbox next to a Transaction Type to hide it from all of the drop-down lists in your database. This can be especially useful when you are no longer using a Transaction Type but want to retain your historical reporting for it.

Deleting drop-down values in Jackrabbit is not recommended because it impacts your ability to filter for that value in your reports.

Jackrabbit

Return Save Changes

Drop-down List Editor

Return					? Help	Send Ide
Choose List	List: TransactionTypes				Check Hide fi	rom usars to
Frequently Asked Questions Class Management, Enrollment & Revenue Reporting	Description: All transactions must ha	T 1 11			· · ·	
Category 1 (Income Categories)	reduce a family/account balance. Trans					
Class	'Payment' are reserved. Reserved Tra			rease a ranniy/ae	Jackra	
Category 2					Jackra	bbit.
Category 3	Tip: Shorter values reduce word-wrappin	ng on your screens and rep	orts.			
Duration			Hide from			
Room	Add Row		users			
Session	Annual Membership	Debit 🔻		Delete		
Status				Delete		
amily	Booster fee	Debit 🔻	_			
Contact Types	Competition Fee	Debit 🔻		Delete		
ePayment Schedule Membership Type	Item Return	Credit 🔻	(reserved)			
Source (How did you hear about us?)	Member Discount	Credit •		Delete		
Status	Merchandise	Debit 🔻	i n	Delete		
Other			_			
Vendor Types (Costumes/Apparel)	NSF returned Funds	Credit •	_	Delete		
Staff	Payment	Credit 🔻	(reserved)			
Certification Level	Recital Fees	Debit 🔻		Delete		
Position	Refund - Overpayment	Debit 🔻	(reserved)	(
Skills	Refund Adjustment		(reserved)		Reserved by Jo	
Student Drop Reason	1				system; require	ed values.
Enroll Type	Registration	Debit 🔻		Delete		
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Sizes (T-shirt, Vendor Size,Chart Size)	Tuition Fee	Debit 🔻	(reserved)			
Skill Level Attained	Ľ					
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Student Uniform Size						
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Item Tax Rates						
Payment Method						
Quick Discount Transaction Sub Types						
Transaction Types						