

# Post Annual Fees

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From the *Transactions* menu, **Post Annual Fees** can be used to post any type of annual fee (registration, membership, insurance, etc.) to existing families or students.

You have the option to post the fees for:

- **Family** based on the *Family Registration Month*. A family's registration date is the date they registered with your facility, either via a Jackrabbit User (in-house) or through online registration, and is displayed on the *Summary* tab of their *Family* record.
- **Student** based on the *Student Start Month*. A student's start date is the date they were first added to the *Family* record in your Jackrabbit database and is displayed on the *Summary* tab of the *Student* record.
- **Student per Class** based on the *Student Start Month*.



Before posting annual fees we recommend you run a Search (either families or students based on how you post your



annual fees) to find any family/student that does not have a Registration Date/Start Date on their Summary tab. Use the Search Criteria **Registration Month = (No Value) / Student Start Month=(No Value)**.

## Jackrabbit Class

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### Post Annual Fees

← RETURN

Search Criteria (Who do you want to bill?)

🔍 Favorites

🔖 Save Favorites

✖ Refresh ?

*Post Annual Fees to Families/Accounts or Students based on their Registration Month using the search criteria below. Note: If Annual Fees are posted in error you can remove them through the Delete Tuition Fees or Delete Transactions function. To post fees to a single class only, use Post Class Transactions function.*

Select Location:

Post Fee Per Family/Acct, Per Student, or Per Student-Class:

Student Start Month (if Per Student):\*

Active (Enrolled) Only?  (Student is currently enrolled in any class.)

Enroll Date From:  Through:

With Students Currently Enrolled in:

Class Session:

Category 1:

Category 2:

Category 3:

Membership Type:

You can narrow the list of people who will be included in the batch and have the fee posted to their accounts using the *Search Criteria (Who do you want to bill?)* including:

- **Select Location** (family)
- **Post Fee Per Family/Acct., Per Student, or Per Student-Class**(Fee Per Student)
- **Student Start Month (if Per Student)**(September)
- **Active (Enrolled) Only?** (are students currently enrolled in any classes?)
- **Enroll Date From and Through**(date the students were enrolled into class)

- **Class Session** (students currently enrolled in classes with this session)
- **Category 1, 2, 3**(students currently enrolled in classes in this category)
- **Membership Type** (family)

Choose what type of fees you want to post, and what details you want to apply to the transactions, in the *Transaction Details to Post (What Fees do you want to post?)* section.

**Transaction Details to Post (What Fees do you want to post?)**

Within this function, duplicate detection prevents the posting of duplicate fees based on the same transaction Date, Type and Amount (per Family, Student or Student-Class).

Transaction Date:

Transaction Type: \*  SubType:

Student Fees: (used only if Post Per=Student)    1st Std.     2nd Std.     3rd Std.     Maximum Fee per Family/Acct:

Taxable?

Transaction Note:

Category1: \*

Session:

3rd student fee applies to 4th, 5th, etc unless a Maximum Fee per Family/Acct is entered and reached.

If you are posting per family you will enter the amount of the fee for a family. If you are posting per student, or per student-class, you will enter the fees for the first student, second student, and the third student. The fee for the third student is used for the fourth, fifth, etc. students in the family unless a maximum fee per family is designated. If a maximum fee exists, the fee will post for each student until that maximum is reached. If the maximum is reached it will be posted to the family in one transaction vs posting each student amount individually.

By default, Post Annual Fees will exclude transactions for a family with previously posted fees with an exact match on:

- Transaction Date
- Transaction Type
- Transaction Amount (per Family, per Student, or per Student-Class)

If you have chosen to post fees per student or by student-class, the transaction must also match the student name (this would mean that the originally posted

transaction would have to have the student listed in the student section of the transaction).

Entering dates in the *Duplicate Check Date From/Through* fields allows you to also exclude duplicate fees for a family/student for a specified date range instead of the exact transaction date. This searches the date range in addition to matching the type, amount, and for per student fees, student name.

If you would like the Family Registration Date or Student Start Date to act as a 'due date' for next year's fees select *Yes* to *Optionally, Advance Registration Date By 1 year*. **Note: To keep a record of their actual registration/start date consider adding those dates to the Notes field on the Misc tab.**

You have the option to preview the fees before you commit to posting them!

The Preview Annual Fees page provides transaction counts and the option to remove a family, or families, from the batch. The fees are not posted to families until the Post Fees button is selected.

**Preview Annual Fees**

← RETURN   **✓ POST FEES**   ✕ CANCEL

**Preview Results**

Process created 3 transaction(s) based on criteria.  
3 transaction(s) are set to post.

**Preview Counts**  
Family/Accounts: 2  
Student: 3

View 1 - 3 of 3   Print   Export   Refresh

Date	Family	Student	Trans Type	Trans Sub Type	Orig Amt	Tax	Amount	Balance	Notes	Cat1	Session	Entered B	All
3/26/2020	Ager	Dani Ager	Registration		25.00	0.00	25.00	458.50		Registration Fee		CB	<input checked="" type="checkbox"/>
3/26/2020	Ager	Dave Ager	Registration		15.00	0.00	15.00	458.50		Registration Fee		CB	<input checked="" type="checkbox"/>
3/26/2020	Zackmann		Registration		50.00	0.00	50.00	327.05	Max Fee per Family/Acct	Registration Fee		CB	<input checked="" type="checkbox"/>

*The Zachmann family has four students so they reached the family maximum that was set. The fee posts as one transaction.*

*To leave a family out of the batch, clear the check box on their fee.*



**If annual fees are posted in error, use *Transactions > Delete Transactions* to delete. See *Delete Transactions* for more information on deleting a fee.**

