

Post Class Transactions

Last Modified on 06/05/2019 8:46 pm EDT

From the *Transactions* menu, **Post Class Transactions** can be used to post fees to families with students enrolled in a specific class.

Using the *Search Criteria* you can filter the enrollments to include only families with a specific Location and/or families with a specific Membership Type (*Family record > Billing Info* tab). Use the *Search* link to locate the class.

Jackrabbit Class

FAMILIES | STUDENTS | CLASSES | EVENTS | STAFF | TRANSACTIONS | STORE | REPORTS | STA

Post Class Transactions

← RETURN ✓ SUBMIT

Search Criteria 🔍 Favorites 📁 Save Favorites ✕ Refresh ?

Post Class Transactions will post a transaction per enrollment for the selected location and class/event. Transactions created will include class/event Category1 and/or Session values. Also, you can further limit the transactions posted to a specific Family-Account Membership Type. Note: If Fees are posted in error, you can remove them through the use of the Delete Transactions function.

Select Location:

Membership Type: Recital=Y

Enrolled in Class: * Advanced Tap - Tues 7pm 🔍 Search Clear

In the *Transaction Details to Post* section, choose what type of fees you want to post and what details you want to apply to the transactions. The *Category 1* and *Session* values will default to those of the class, however, you are able to change them.

Transaction Details to Post:

Within this function, duplicate detection prevents the posting of duplicate fees based on the same Transaction Date, Type, Subtype, Orig. Amount, Discount and Note.

Post Date:	<input type="text" value="3/26/2020"/>	
Trans Type: *	<input type="text" value="Recital Fees (Debit)"/>	Subtype: <input type="text"/>
* Category1:	<input type="text" value="(Use Selected Class Category1)"/>	Session: <input type="text" value="(Use Selected Class Session)"/>
Orig. Amount:	<input type="text" value="50.00"/>	
Discount:	<input type="text" value="0.00"/>	
Tax:	<input type="text" value="0.00"/>	
Amount:	<input type="text" value="50.00"/>	
Taxable?:	<input type="checkbox"/>	
Note:	<input type="text" value="Fee for Fall Recital"/>	

By default, Post Class Transactions will exclude transactions for a family with previously posted fees that are an exact match on all of the following:

- Transaction (Post) Date
- Transaction Type and Subtype
- Original Amount
- Discount
- Note



There is no preview available, when you select Submit the fees are posted. If fees are posted in error, use Transactions > Delete Transactions to delete them. See [Delete Transactions](#) for more information on deleting a fee.

After you submit the batch you will be given a summary of the number of transactions posted and a link to view the transactions. The transaction listing provides links to the family accounts.

Class transactions can also be posted from within the *Class* record using

the *Post Class Transactions* button. With that method, however, you are not able to filter by family Location or Membership Type.
