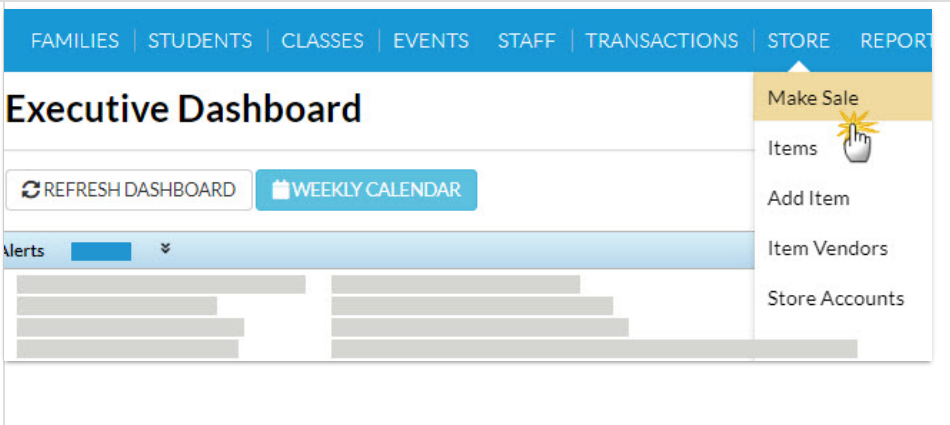# Make a Store Sale

[Watch a (2:23) video tutorial on Making a Store Sale](#)

Jackrabbit gives you options when you want to make a sale from your store. You can post the fees to the family's account or accept immediate payments at the time of sale for store item(s).

Make a Sale/Post Fees

There are two ways to make a sale in Jackrabbit: from the *Store menu* or directly from a family record.

1. Go to **Store (menu)** > **Make Sale** or alternatively, open a family record and click the **Make Sale/Post Fees** button. Regardless of the access point you start from the procedure is the same.

From the Store Menu This option allows you to choose a family or store.	
From a Family Record	

This option allows you to complete a transaction for a specific family.

Family: Harding

← RETURN 🖫 SAVE CHANGES 🗑 DELETE

| Make Sale/Post Fees | Payment | Refund | Statement | | Add Student | Add Contact | Archive Family |

| Summary | Contacts | Classes | Events | Transactions | Billing Info | Misc |

View Past Enrollment History

View 1 - 1 of 1   🖨 Print   ⟳ Refresh

Student	Class	Session	Enroll Date	Type	Day:

2. Select a *Store* or *Family*.

   - **Store** - When you initiate your sale from the *Store* menu > *Make a Sale*, the default store information is automatically added to the *Store Details* section. If you have multiple stores the default is set to the first store that was added to Jackrabbit, as identified by the Store ID that was created for it at that time. The Store ID is located on the *Summary* tab of the *Store* record, on the bottom right. See **Add Additional Store Accounts** for more information.

   - **Family** - When you initiate your sale from a *Family* record > *Make Sale/Post Fees* button, the family's information is automatically added to the *Family Details* section.

     Note: If the sale is for a different store or family, start typing into the *Store/Family Search* field. Jackrabbit will search for matches after the first letter is typed. A list of matches displays and the correct one can be selected. All *Store* accounts are listed with 'Store:' in front of the name to differentiate between stores and families. Stores show at the top of the list. To assist in finding the correct family, each account displays the store/family name and billing contact's name and address.

Make Sale / Post Fees

← RETURN

Family or Store name is pre-filled depending if the sale is initiated in a *Family* record or from the *Store* menu.

Family Details

Harding — Store/Family Search — Current Balance 131.55 — View Transaction History

Address — 2643 Fir Street, Huntersville, NC 28078

Transaction Date — 3/23/2020

Sale Summary

Sub-Total — Tax — Total

Save Fee is only an option when the sale is initiated in a *Family* record.

Payment Options

$ Save Fee & Pay Now — ✓ Save Fee

Select Store Items ▼ [?]

Return Item

Location*	Item #	Item Name	Qty	Student	Class/Event	Note	Price	Discount	Amount
▼	PS-387441	Hoodie - Sma	1 ⬍	▼ 🔍	▼	Hoodie - Small	45.00		45.00 ✕

Post Fees [?]

This section gives you the option to post other fees (not store related).

Location*	Type*	Category1*	SubType	Orig Amount	Discount	Tax	Amount	
▼	▼	▼	▼			☐		✕

Session	Student	Class/Event	Note
▼	▼	▼ 🔍	

3. **Select Store Items.** Enter the item number manually or use a barcode scanner. The item's price and details will appear on the transaction line when the item is selected. New rows are added automatically.
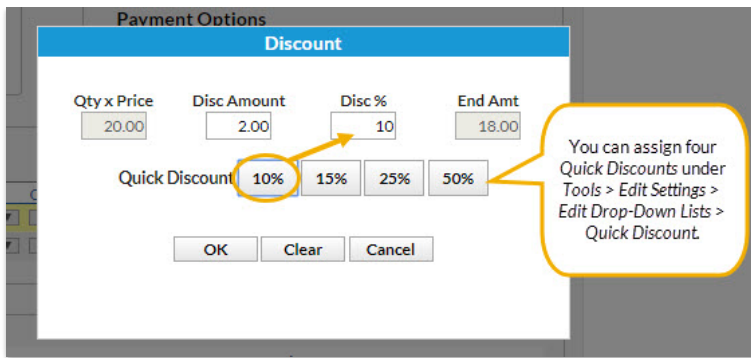
4. Select the **Quantity (Qty).** Use the up/down arrows to select the correct quantity. Once an item is selected the predetermined price will populate and the *Discount* and *Amount* fields become activated.

   Note: The tax is totaled in the *Sale Summary* section (top right).

5. Select **Student**, **Class/Event** and add a **Note** if applicable.

6. Add a **Discount** for the store item or click on the calculator icon.

   - The calculator icon opens up a *Discount* window where you can enter the discount amount, discount percentage or click on a *Quick Discount* button. The *Quick discount* buttons will calculate the correct amount.

   - Go to *Tools > Edit Settings > Edit Drop-Down Lists > Transaction > Quick Discount* to add up to 4 discount amounts.

Payment Options

Discount

Qty x Price	Disc Amount	Disc %	End Amt
20.00	2.00	10	18.00

Quick Discount 10% 15% 25% 50%

You can assign four Quick Discounts under Tools > Edit Settings > Edit Drop-Down Lists > Quick Discount.

OK   Clear   Cancel

7. Add fees in the **Post Fees** section (bottom) that are not store related when applicable.

8. Click on **Save Fee & Pay Now** or **Save Fee** to complete the transaction and move to payment options in the *Payment Transaction Entry* page.

   ○ *Save Fee* will only display when you initiate a sale from a *Family* record.

   ○ *Save Fee & Pay Now* button is visible if the transaction is for a Store account.

   ○ After clicking on *Save Fee & Pay Now*, if the family has a prior balance, you'll be asked if the full balance is being paid. If **Yes** is selected, then the full balance will appear as the payment amount. If **No** is selected, then only the amount of the transactions just entered will be the payment amount.

If you don't see the Payment Transaction Entry page after clicking a payment button, check your pop-up blocker and allow the pop-up.

Payment Options

You'll notice multiple payment options for store merchandise: cash, check, credit cards and any other payment methods you accept for your business. The payment method drop-down list is created in *Tools > Edit Settings > Drop-Down Lists > Transaction > Payment Method.*

ePayments in Jackrabbit

Use Card/Acct on File - This will process the payment amount using the credit card/bank draft information on file (Family's *Billing Info* tab). This button is inactive for store accounts because they do not have credit cards on file.

Use New Card/Acct on File - Opens a pop-up window to enter the customer's credit card information.

Use Terminal Payment - The card can be swiped with a card swipe reader or the credit card information can be manually entered. When using the Store account, the card is processed for this

transaction ONLY. No credit card information is saved.

When using a Family account, an option is offered to save the credit card information (if no card is currently on file) or replace the existing credit card (if a card is already on file).

If the Family Billing Contact has an email address, the email receipt confirmation is automatically sent to this email address unless the *Do Not Send* box is checked. To email a confirmation to another email address, enter the email address(es) in the space provided.

Print a Receipt

In the *Payment Transaction Entry* page, check the *Receipt* box. The receipt lists all fees related to the payment. e-Commerce payments include the approval code, transaction id code, and last 4 digits of the card number. Payment notes also appear on the receipt.

Receipts that are emailed with credit card transactions only include the total amount of the transaction.

Sample cash receipt shown below. You have the option to *Print* or *Email* the receipt from this window.