

Effortless Payment Collections with ePayment Schedules

Last Modified on 06/05/2019 9:23 pm EDT

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Jackrabbit Best Practices



ePayment Schedule is a great way to identify and group families based on a payment option to which they have agreed. This field, found on the Family's *Billing Info* tab, most commonly represents different payment options or timing of payments. Using this drop-down, you can handle each group of families differently when posting fees or **processing ePayments in a batch**.

Family: Anderson

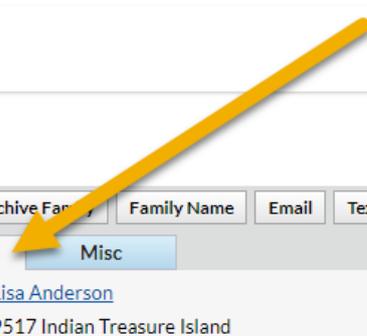
← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Text

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

Billing Delivery ? Membership Type Monthly Billing Contact [Lisa Anderson](#)

ePayment Method Credit Card **ePayment Schedule 1st of the Month** Address 9517 Indian Treasure Island
Winston-Salem, NC 27106
Email lisa@email.com



Common ePayment schedule values adopted by Jackrabbit users are:

- Autopay
- Self-pay
- Monthly
- Annual

- 1st of the Month
- 15th of the Month

Benefits of using ePayment Schedules

Why does it make sense to use ePayment schedules? There are some significant benefits, including:

- ★ **Less manual work.** You'll be able to run processes based on groups of families instead of handling families individually.
- ★ **Fewer mistakes.** With the ability to target families by group, you are more likely to bill active families correctly - no accidental double postings.
- ★ **Easier tracking.** Know how or when your families are paying to help you forecast revenue and ensure payments are received on time.

Depending on how you implement ePayment Schedules in your database, consider making the field required on your Online Registration form. This allows new families to choose their preference and eliminate the work of assigning ePayment Schedules to new families for your office staff. For assistance with using this field on your Online Registration form, see our Help article [Web Registration Form - Field Options / Labels](#).

If you want families to have the option to change their preference, you can allow families to update the field in your Parent Portal. Check out our Help article on how to [Set Up the Parent Portal](#) for more details.



If you plan to use ePayment Schedule in your database, **ALL** families should have a value selected for this field. This ensures all families you wish to include are captured when you post fees or process a batch of ePayments to a select group of families. Use the Search under the Families menu to make sure all families have a value

selected.

Business Scenarios

You offer monthly and annual payment options. When posting tuition fees, you can choose to post fees for just the families that have the ePayment Schedule of “Monthly”. This will exclude all families that have an ePayment Schedule of “Annual” families since they have already paid tuition for the year.

You offer 5% discount to families that pay the year in full. When posting tuition fees, you can choose to post fees for just the families that have the ePayment Schedule of “Annual” and include an Additional Discount of 5%.
