

# Make a Store Sale

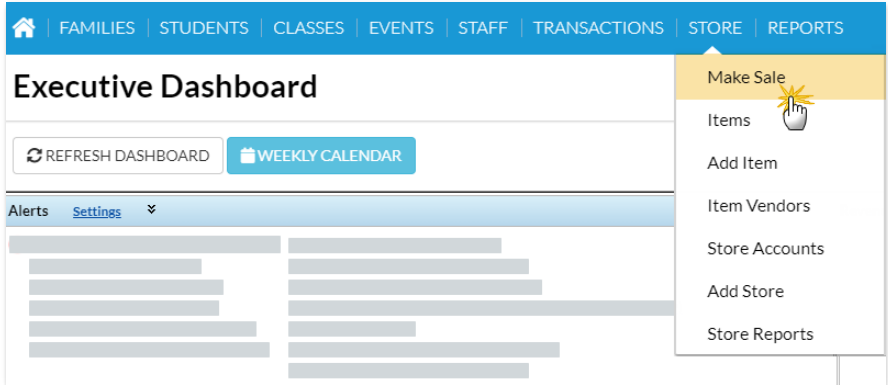
Last Modified on 11/09/2021 4:18 pm EST

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 multiple ways to make a sale in Jackrabbit: from the *Module (menu) > Store*, directly in a *Family* record, or in an *All Families* grid.

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

<b>From the Store Menu</b>  This option allows you to choose a family or store.	 The screenshot shows the Jackrabbit Executive Dashboard. At the top is a navigation bar with links: FAMILIES, STUDENTS, CLASSES, EVENTS, STAFF, TRANSACTIONS, STORE, and REPORTS. The 'STORE' link is highlighted. Below the navigation bar is the 'Executive Dashboard' header. Underneath are two buttons: 'REFRESH DASHBOARD' and 'WEEKLY CALENDAR'. Below these are 'Alerts' and 'Settings' tabs. The main content area shows a grid of family records. On the right side of the dashboard, a dropdown menu is open for the 'STORE' link, showing options: 'Make Sale' (highlighted with a yellow star and a hand cursor), 'Items', 'Add Item', 'Item Vendors', 'Store Accounts', 'Add Store', and 'Store Reports'.
<b>From a Family Record</b>	

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
Mis

View Past Enrollment History

View 1 - 1 of 1
Print
Refresh

Student	Class	Session	Enroll Date	Type	Day

#### From All Families-Row Menu

This option allows you to post a sale from a family row menu.

<input type="checkbox"/>	⋮	EDU	Dierksen	
<input type="checkbox"/>	⋮	EDU	Evans	
<input type="checkbox"/>	⋮			
<input type="checkbox"/>	⋮			
<input type="checkbox"/>	⋮	EDU	Harding	

View / Edit
Post Fees
Accept Payment/Post Credit
Add a Note

## 2. Select a Store or Family.

- **Store** - When you initiate your sale from the *Store (menu)* > *Make 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, or a *Family row menu*, 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 Details**

**Harding** Store/Family Search Current Balance 131.55  
[View Transaction History](#)

**Address** 2643 Fir Street  
Huntersville, NC 28078

**Transaction Date**

**Sale Summary**

Sub-Total  
Tax  
Total

**Payment Options**

**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** ?

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 the *Gear (icon) > Settings > General > Drop-down List Editor (left menu) > 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%

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 on 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 under the *Gear (icon) > Settings > General > Drop-down List Editor (left menu) > Transaction > Payment Method*.

**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.

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 confirmation to another email address, enter the email address(es) in the space provided.

**Use Terminal Payment** - *This option is ONLY available when you have an EMV Card Terminal set up for your business.* 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.

## Print a Receipt

On 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.

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

Receipt

**From:**  
**Jackrabbit Help Center**  
9820 Northcross Center Ct  
Huntersville, NC 28078

**For:**  
Ager  
2016 Hummingbird Cresent  
Huntersville, NC 28078

Each item purchased and paid for is listed separately on the receipt.

Payment Summary					
Fee Date	Type	Student	Class/Event	Amount	Amount Paid
7/14/2020	Merchandise - Pro Shop Note: Hoodie - Small			45.00	45.00

Customer ID: 12574863

Payment amount, payment method and payment date are shown here.

Payment: 45.00  
Payment Method: Cash  
Date Paid: 7/14/2020

---

## Frequently Asked Questions

[Expand/Collapse All](#)

**Q.** Does the Store interface with a Cash Drawer?

**A.** No, Jackrabbit does not interface with a cash drawer. You should print Deposit Slips each day to reconcile the contents of the cash drawer.

---