

# Transaction Types

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*Transaction Types* are used to properly record the type of fee and payment transaction. They are used for reporting and for searching information in Jackrabbit. Credit transactions will decrease a family's balance and Debit transactions will increase the balance.

Some *Transaction Type* fields have already been included for you. Several are reserved for Jackrabbit functionality and can not be deleted, however, they can be hidden. The pre-assigned *Transaction Types* are a great starting point, but it's easy to create more.

## Create a Transaction Type

Follow these steps to create a Transaction Type.

1. Go to the **Gear icon > Settings > General > Drop-down Lists** (left menu).
2. Click **Transaction Types** from the *Transaction* section on the left menu.
3. Click **Add Row** to add a new *Transaction Type*.

**Drop-down List Editor**

← RETURN   **SAVE CHANGES**

**Choose List**

- Frequently Asked Questions
- Class Management, Enrollment & Revenue Reporting
  - Category 1 (Income Categories)
- Class
  - Category 2
  - Category 3
  - Duration
  - Room
  - Session
  - Status
- Family
  - Contact Types
  - ePayment Schedule
  - Membership Type
  - Source (How did you hear about us?)
  - Status
- Other
  - Vendor Types (Costumes/Apparel)
- Staff
  - Certifications
  - Position
  - Skills
- Student
  - Drop Reason
  - Enroll Type
  - Gender
  - Martial Arts Belt Size
  - Sizes (T-shirt, Vendor Size, Chart Size)
  - Skill/Level Category
  - Student Uniform Size
- Transaction
  - Item Tax Rates
  - Payment Method
  - Quick Discount
  - Transaction Subtypes
    - Transaction Types**

**List: TransactionTypes**

Description: All transactions must have a Type and must be a labeled a Debit or a Credit. Transaction Types labeled as a Credit reduce a family/account balance. Transaction Types labeled as a Debit increase a family/account balance. Some Types such as 'Payment' are reserved.  
Tip: Shorter values reduce word-wrapping on your screens and reports.

Add Row		Hide from users	Delete
Adjustment	Credit ▼	<input type="checkbox"/>	Delete
Adjustment	Debit ▼	<input type="checkbox"/>	Delete
Annual Membership	Debit ▼	<input type="checkbox"/>	Delete
Booster Fee	Debit ▼	<input type="checkbox"/>	Delete
Class Credit	Credit ▼	<input type="checkbox"/>	Delete
Competition Fee	Debit ▼	<input type="checkbox"/>	Delete
Convenience Fee	Debit ▼	<input type="checkbox"/>	Delete
Costume Fee	Debit ▼	<input type="checkbox"/>	Delete
Donation	Debit ▼	<input type="checkbox"/>	Delete
Fee Credit - Tuition Fee	Credit ▼	<input type="checkbox"/>	(reserved)
Item Return	Credit ▼	<input type="checkbox"/>	(reserved)
Member Discount	Credit ▼	<input type="checkbox"/>	Delete
Merchandise	Debit ▼	<input type="checkbox"/>	Delete
NSF Returned Funds	Credit ▼	<input type="checkbox"/>	Delete
Payment	Credit ▼	<input type="checkbox"/>	(reserved)
Recital Fees	Debit ▼	<input type="checkbox"/>	Delete
Refund - Overpayment	Debit ▼	<input type="checkbox"/>	(reserved)
Refund Adjustment	Credit ▼	<input type="checkbox"/>	(reserved)
Registration	Debit ▼	<input type="checkbox"/>	(reserved)
Surcharge	Debit ▼	<input type="checkbox"/>	(reserved)
Technology Fee	Debit ▼	<input type="checkbox"/>	(reserved)
Tuition Fee	Debit ▼	<input type="checkbox"/>	(reserved)

Check **Hide from users** to hide a value from the drop-down lists.

Items on the list that are designated as reserved can be hidden from users.

4. Enter the name of the **Transaction Type** and select *Debit* or *Credit* from the drop-down list. This tells Jackrabbit whether the transaction should debit or credit a family's account.
5. Click **Save Changes**.



Click the *Hide from users* checkbox next to a *Transaction Type* (including reserved) to hide it from all of the drop-down lists in your database. This can be especially useful when you are no longer using a *Transaction Type* but want to retain your historical reporting for it. Deleting drop-down values in Jackrabbit is not recommended because it impacts your ability to filter for that value in your reports.

## Delete a Transaction Type

Follow these steps to delete a *Transaction Type*.

1. Go to the **Gear icon** > **Settings** > **General** > **Drop-down Lists** (left menu).
2. Click **Transaction Types** from the *Transaction* section on the left menu.
3. Select the *Transaction Type* you no longer need and click **Delete**. Click **OK** in the warning window.
4. Click **Save Changes**.



Deleting a drop-down value can affect your historical reporting. Review the [Customize Drop-down Lists Frequently Asked Questions](#) before editing or deleting a drop-down value).

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