

Transaction Subtypes

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Transaction Subtypes further define and expand a *Transaction Type*. For example, if the *Transaction Type* is *Tuition (Debit)*, the *Transaction Subtype* could be the month (Jan, Feb, Mar, etc.).

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu).
2. Click **Transaction Subtypes** from the *Transaction* section in the left menu.
3. Click **Add Row** to add a new *Transaction Subtype* and enter the name.
4. Click **Save Changes**.

TIPS

- Select the **Hide from users** checkbox next to a Transaction Subtype to hide it from all of the drop-down lists in your database.
- Some Subtypes are reserved for use with Jackrabbit features, such as **Automated Tuition Posting**.
- Deleting drop-down values in Jackrabbit is not recommended because it impacts your ability to filter for that value in your reports.

Example of a *Transaction Type* & *Subtype* on a Family's **Transactions** tab:

Family: Ager

← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email Email Schedules Submit Absences Merge Family

Summary Contacts Classes Events **Transactions** Billing Info Misc Notes (2) Resources (1) Policies (0)

View Transaction History **View Unapplied Credits & Unpaid Fees** Help ?

Current Balance **259.38** Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT

Last 20 (Most Recent) Transactions

View 1 - 20 of 20 Print Refresh

			Date	Type	Sub Type	Orig Amt	Disc Amt	Amt	Unpaid Amt	Balance	Note	Pmt Meth	Date Paid	Cat1	Sess	Student	Class/Event
			7/1/2021	Tuition Fee	Jul	84.38		84.38	84.38	259.38	July, Base Fee=67.50			Cheer	Summer 2021	Dave Ager	Cheer Ready - Fri 6pm
			7/1/2021	Tuition Fee	Jul	45.00	5.00	40.00	40.00	175.00	July, Multi-Student Disc=5.00			Dance	Summer 2021	Dani Ager	Ballet L1 - Mon 5pm
			7/1/2021	Tuition Fee	Jul	45.00	5.00	40.00	40.00	135.00	July, Multi-Student Disc=5.00			Dance	Summer 2021	Barbie Ager	Ballet L1 - Mon 5pm