Process a Single ePayment

Last Modified on 07/07/2025 3:21 pm EDT

To accommodate different workflows, an individual ePayment can be generated in several ways.

The *Payment/Credit Transaction Entry* window can be opened:

- From the *Family* record with the **Payment/Credit** button.
- From **All Families**, using the row action **Accept Payment/Post Credit**.
- With the **Save Fee & Pay Now** button in the *Make Sale/Post Fees* window *(Transactions* menu > *Post Transactions)* after selecting a family and posting a fee.
- Using the *Family Search* criteria in **Process ePayments** (*Transactions* menu).

> Automate ePayments for a specific family using **Process ePayments** under the *Transactions* menu. **Learn more about scheduling ePayments to process later**.

When processing individual ePayments in Jackrabbit, you can use a credit card or bank account the family has already saved on their account (*Billing Info* tab of *Family* record*),* or you can enter a different credit card number with the option to use it only once or to save it to the account (when you allow **multiple cards per family**).

Once in the *Payment/Credit Transaction Entry* window, there are three options.

Expand the sections below to step through each option.

Expand/Collapse All

Use Card/Acct on File Button (Process a Saved Credit Card or Bank Account)

In order to process a credit card or draft a bank account that a family has saved to their *Billing Info* tab:

> ePayments must be activated for your Jackrabbit system, and your system must be connected to a gateway account. See **Contact Our ePayment Partner**.
>
> The family must have an *ePayment Method* saved on the *Billing Info* tab in their *Family* record.
>
> The family must have credit card or bank account details saved on the *Billing Info* tab in their *Family* record. Learn more in the **Manage Credit Cards & Bank**

Accounts in the Family Record section.

If you are processing a bank account ePayment, the *Home* or *Primary Phone* field on the *Family* record > *Summary* tab must contain a phone number.

To process the ePayment:

1. Open the *Payment/Credit Transaction Entry* window from the *Family* record, from *All Families*, or from *Make Sale/Post Fees*.

2. Enter the payment details.
   - The **Trans Date** (transaction date) defaults to the current date (today's date). You can change this if needed.
   - The **Transaction Type** defaults to *Payment (Credit)* and should not be changed.
   - Optionally, add a **Subtype**.
   - It is not necessary to enter a **Method** of payment. This will be auto-assigned based on the payment method used, e.g., Visa, Mastercard, or Bank Account.

3. Enter an amount in the **Payment** field.

4. Apply the payment to the unpaid fees displayed.
   - To apply the payment to the oldest fees first, click **Apply Payment to Oldest Fees First.**
   - To apply the payment to specific fees, click the field in the **Apply Amt** column for the specific fee to be paid. When you click the field, Jackrabbit will pre-fill the amount, however, this can be edited to a different amount when applicable.

5. Click the **Use Card/Acct on File** button to open the *Post ePayment* window.
   - If there is one card on file per family, that card will be processed. If you allow **multiple cards on file per family**, the Primary Card will be selected, but you can change to another card on file.
   - If you want to change the s*ubject and header text for the approved payment email notification,* select the **Edit the Approved Email Subject and Header Text** checkbox. Selecting this checkbox opens a field that allows you to make changes. The edits apply to this transaction only.

6. Click **Submit ePayment**. Jackrabbit transmits the request to your merchant processor and returns an approved or declined message. A new pop-up window displays the approved or declined details. This information is recorded to the *Family* record, on the *Transactions* tab, and the family balance is updated accordingly. Click **OK** to close the window and return to the *Family* record.
   Note: Because they don't process in real-time, bank account transactions are always initially approved. They can take up to 7-10 days to complete 'settlement' and can be declined during this time. Be sure to confirm a bank account transaction with your bank records. For more information, see **Reconcile Bank Drafts with Bank Statements**.

Use New Card Button (Process an Unsaved Credit Card)

With the **Use New Card** button, you can process an ePayment to a credit card that has not been previously saved to the family's account.

1. Open the *Payment/Credit Transaction Entry* window from the *Family* record, from *All Families*, or from *Make Sale/Post Fees*.

2. Enter the payment details.
    - The **Trans Date** (transaction date) defaults to the current date (today's date). You can change this if needed.
    - The **Transaction Type** defaults to *Payment (Credit)* and should not be changed.
    - Optionally, add a **Subtype**.
    - It is not necessary to enter a **Method** of payment. This will be auto-assigned based on the payment method used, e.g., Visa, Mastercard, or Bank Account.

3. Enter an amount in the **Payment** field.

4. Apply the payment to the unpaid fees displayed.
    - To apply the payment to the oldest fees first, click **Apply Payment to Oldest Fees First.**
    - To apply the payment to specific fees, click the field in the **Apply Amt** column for the specific fee to be paid. When you click the field, Jackrabbit will pre-fill the amount; however, this can be edited to a different amount when applicable.

5. Click the **Use New Card** button.

6. In the *Enter/Swipe Credit Card* window:
    - Enter the credit card information manually, or if your ePayment gateway supports it, use a credit card swiper (not EMV). **Note:** If you are located in Canada and enter the card information manually, the **CVV** code will be required for the one-time transaction. This code is not saved in your system.
    - Enter the **Card Billing Address** and an **Email Address**. The Zip Code is a required field.
    - If you do not want to send a receipt to the *Billing Contact Email*, check the appropriate box.
    - Choose one of the **Card Save Options** (see below).

    Jackrabbit Pay™ Clients may have a slightly different experience, e.g., an additional step or a different field label. If you need assistance, contact our dedicated ePayments Team directly at **payinfo@jackrabbittech.com**.

7. Click **Submit ePayment**. Jackrabbit transmits the request to your merchant

processor and returns an approved or declined message. A new pop-up window displays the approved or declined details. This information is recorded to the *Family* record, on the *Transactions* tab, and the family balance is updated accordingly. Click **OK** to close the window

Card Save Options

When you want to add a new card to use for ePayment, it will depend on how many cards are already on the account and the ePayment settings. You can set the ePayment settings to allow a max of 3 credit cards per family/account.

No Card on File These options are presented when there are no cards on file: • Do not save card now; one-time use only • Save as Primary Card	
One or Multiple Cards on File These options are presented when multiple cards on file is set to ***No****: • Do Not save card now; one-time use only • Save and Replace Primary Card (delete existing primary card) **Gear (menu) > Settings > ePayments > Credit Card & Bank Account Settings > Manage Settings > Cards Accepted (left menu).*	

One or Multiple Cards on File These options are presented when multiple cards on file is set to ***Yes****: • Do Not save card now; one-time use only • Save as Secondary Card • Save & Replace Primary Card (delete existing primary card) • Save as Primary Card (former Primary card becomes a secondary card on file) **Gear (menu) > Settings > ePayments > Credit Card & Bank Account Settings > Manage Settings > Cards Accepted (left menu).*	
Three Cards (maximum) on File These options are presented when a maximum of 3 cards are saved on the account: • Do Not save card now; one-time use only • Save & Replace Primary Card (delete existing primary card)	

Save & Split Payment (Split a credit card payment with another payment method)

Use the **Save & Make Another Payment** button to split a payment between an ePayment method and another payment method.

1. Open the *Payment/Credit Transaction Entry* window from the *Family* record, from *All Families*, or from *Make Sale/Post Fees*.

2. Enter the details of the cash or check portion of the split payment.
    - The **Trans Date** (transaction date) defaults to the current date (today's date). You can change this if needed.
    - The **Transaction Type** defaults to *Payment (Credit)* and should not be changed.
    - Optionally, add a **Subtype**.
    - Add the **Method** of payment.

3. Click the **Save & Make Another Payment** button. The payment details are recorded to the *Family* record, on the *Transactions* tab, and the family balance is updated accordingly.

4. When the *Payment/Credit Transaction* window reopens, click the **Use Card/Acct on File** button or the **Use New Card** button to complete the 2nd part of the payment.

Example:

The family owes $180 and wants to pay $100 in cash and the remaining $80 with a credit card they have on file.

- Click the **Payment/Credit** button.
- Change the **Method** to **Cash**.
- Change the **Payment** to **$100.00**.
- Click the **Apply Amt** field for the fees to be paid.
- Click **Save & Make Another Payment**.

- The Payment/Credit Transaction Entry window re-opens with a balance of $80.00.
- Click either the **Use Card/Acct on File** or the **Use New Card** button to process the $80 as an ePayment through the gateway.

> If you own a credit card swiper (supplied by your gateway provider), you can also swipe a credit card to process a payment.