

# Test a Parent Portal ePayment

Last Modified on 10/20/2023 11:05 am EDT

The best way to understand the payment flow is to log into a Portal yourself and do a test payment. This allows you to see things from your parents' perspective.

Follow these steps to create a testing Portal and make a payment:

1. Create your own family as a test family. Post a fee for \$1.00 to the family.
2. Add a Billing Contact with a valid email address that is **your own**. You can enter your credit card information or bank account information under the Billing tab, or, you can wait and enter it in the Portal.
3. Use the **Reset Portal Password** button on the *Contact* page to generate a temporary password. You can also use the **Reset Password** link on the Portal login page. Remember, you can access your portal from within your database BEFORE it is placed on your website by going to *Gear (icon) > Settings > Parent Portal*, then clicking the **Go to Parent Portal** link in the upper left corner.
4. Log into your portal. If you did not add your credit card or bank account information in Jackrabbit go to the *Billing & Payments* option in the top menu to go to the *Account* page. Select **Saved Payment Methods**. Click the '+' button and enter **your own** credit card information.
5. Back on the *Account* page click the green **Pay Now** button.
6. On the *Make a Payment* page select the \$1.00 fee and click **Pay Now**.

**Note:** This will actually charge the credit card and send the payment through your gateway and to your merchant processor.

Make a Payment

Current Balance: 1.00    Payment Amount: 1.00    Payment Method: Visa 8886

PAY NOW

OUTSTANDING FEES (1)

Select the fees you'd like to pay.

<input type="checkbox"/>	DATE	TYPE	DUE	PAYMENT AMOUNT
<input checked="" type="checkbox"/>	10/20/2023	Adjustment	1.00	1.00

7. In the *Confirm Payment* window, click the green **Confirm** button to complete the payment. A window will display the credit card's last 4 digits along with the amount paid and the confirmation #. Click **OK**.
  - o On the *Transaction* tab of the family's record, you can see the approved payment.



PAYMENT POSTED 10/20/2023

✓ Thank You

☒ CREDIT CARD ENDING IN 8886

<b>1.00</b>	<b>123456</b>
AMOUNT	CONFIRMATION #

OK



Run the **Parent Portal Log** (Reports menu) with the word "approved" in the *Filter Text* field and it will provide you a list of all approved portal payments during the date range you specify.

---