Transaction Types

Last Modified on 09/14/2023 7:57 am EDT

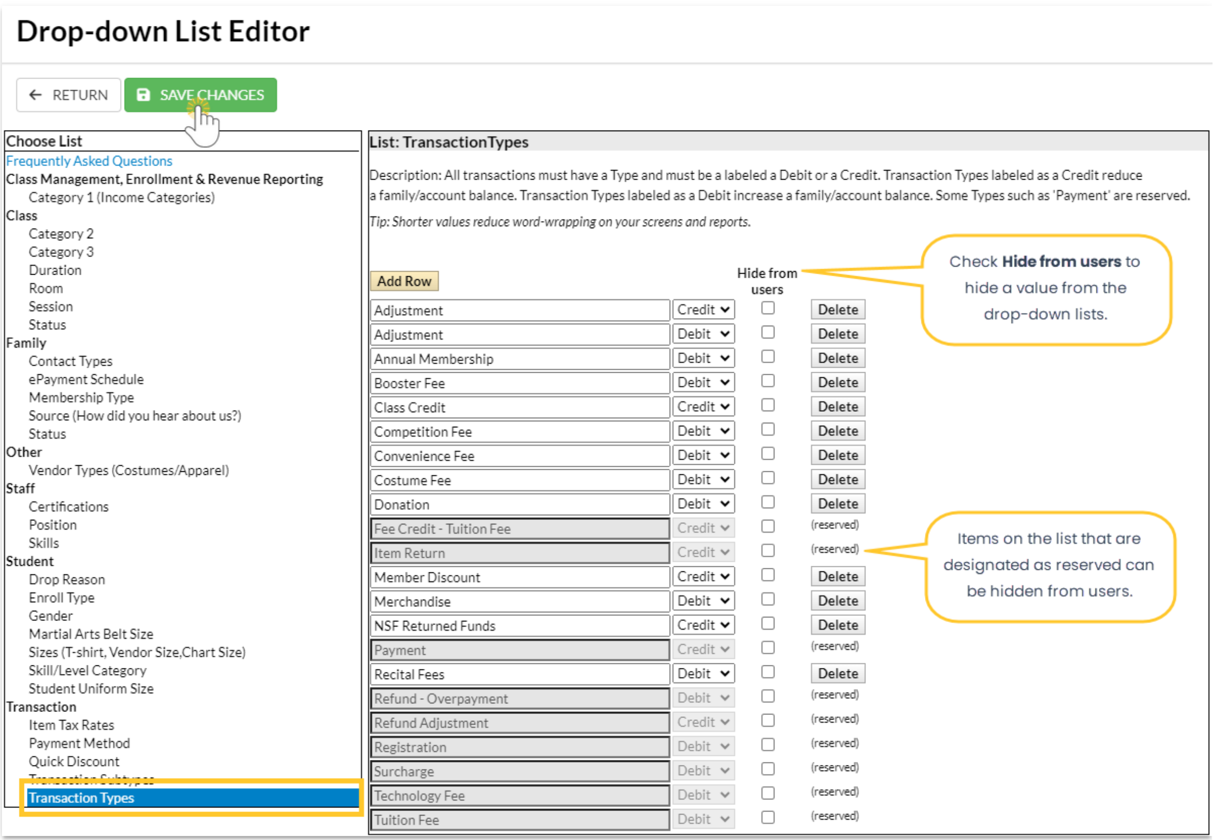
Transaction Types are used to properly record the type of fee and payment transaction. They are used for reporting and for searching information in Jackrabbit. Credit transactions will decrease a family's balance and Debit transactions will increase the balance.

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.*



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).