

Post Annual Fees

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From the *Transactions (menu) > Post Transactions > Annual Fees* can be used to post any type of annual fee (registration, membership, insurance, etc.) to existing families or students.

You have the option to:

- **Post fee per Family** based on the *Family Registration Month*. A family's registration date is the date they registered with your facility, either via a Jackrabbit User (in-house) or through online registration; it is displayed on the *Summary* tab of their *Family* record.
- **Post fee per Student** based on the *Student Start Month*. A student's start date is the date they were first added to the *Family* record in Jackrabbit; it is displayed on the *Summary* tab of the *Student* record.
- **Post fee per Student per Class** based on the *Student Start Month*.

The screenshot shows the 'Post Annual Fees' interface. A yellow box highlights the 'Search Criteria (Who do you want to bill?)' section, which includes the following fields:

- Select Location: [Dropdown]
- Post fee per: Student Per Class [Dropdown]
- Student Start Month (if Per Student):* December [Dropdown]
- Active (Enrolled) Only? Yes [Dropdown] (Student is currently enrolled in any class.)
- Enroll Date From: [mm/dd/yyyy] [Calendar] Through: [mm/dd/yyyy] [Calendar]
- With Students Currently Enrolled in:
 - Class Session: Winter 2023 [Dropdown]
 - Category 1: [List: Annual Fees, Ballet, Cheer, Events, Gift Cards]
 - Category 2: [List: Advanced, Beginner, Competitive, Intermediate]
 - Category 3: [List]
- Classes that have a Registration Fee? [Dropdown]
- Membership Type: Recreational [Dropdown]

A yellow callout box on the right contains the text: "Based on this criteria, recreational families with actively enrolled students that started in December will have a fee posted for each Winter 2023 class the students are enrolled in."

Use the **Search Criteria** to narrow the list of people who will be included in the batch and have the fee posted to their accounts.

Based on the criteria selections in the above example, a fee would be posted to families with a

Membership Type of Recreational for each class their students who started in December are actively enrolled in for the Winter 2023 session.

The **Transaction Details to Post** section lets you choose the type of fees you want to post and what details you want to apply to the transactions.

Transaction Details to Post (What Fees do you want to post?)
Within this function, duplicate detection prevents the posting of duplicate fees based on the same transaction Date, Type and Amount (per Family, Student or Student-Class).

Transaction Date:

Transaction Type: * SubType:

Student Fees: (used only if Post Per=Student) Maximum Fee per Family/Acct: 3rd student fee applies to 4th, 5th, etc. unless a Maximum Fee per Family/Acct is entered and reached.

Taxable?

Transaction Note:

Category1: *

Session:

By default, this function only excludes duplicate transactions for the same exact Date, Type and Amount. But you can also exclude duplicate transactions within a date range (ex. entire month) using the fields below.

Duplicate Check Date From: Through:

Optionally, Advance Registration Date By 1 year?

If you are posting per family, you will enter the fee amount for a family. If you are posting per student or per student per class, you will enter the fees for the first student, second student, and third student. The fee for the third student is used for the fourth, fifth, etc. students in the family unless a maximum fee per family is designated. If a maximum fee exists, the fee will post for each student until that maximum is reached. If the maximum is reached, it will be posted to the family in one transaction vs posting each student amount individually.

By default, Post Annual Fees will exclude transactions for a family with previously posted fees with an exact match on:

- Transaction Date
- Transaction Type
- Transaction Amount (per Family, per Student, or per Student-Class)

If you have chosen to post fees per student or by student per class, the transaction must also match the student name (this would mean that the originally posted transaction would have to have the student listed in the student section of the transaction).

Entering dates in the Duplicate Check Date From/Through fields allows you to also exclude duplicate fees for a family/student for a specified date range instead of the exact transaction date. This searches the date range and matches the type, amount, per-student fees, and student name.

If you would like the Family Registration Date or Student Start Date to act as a 'due date' for next year's fees, select Yes to Optionally, Advance Registration Date By 1 year. **Note: To keep a record of their actual registration/start date, consider adding those dates to the Notes field on the Misc tab.**

You can preview the fees before you commit to posting them!

The Preview Annual Fees page provides transaction counts and the option to remove a family, or student, from the batch. The fees are not posted to families until the **Post Fees** button is selected.

Preview Annual Fees

← RETURN ✓ POST FEES X CANCEL

Preview Results

Process created 3 transaction(s) based on criteria.

3 transaction(s) are set to post.

Preview Counts

Family/Accounts: 1
Student: 2

View 1 - 3 of 3 Print Export Refresh

Date	Family	Student	Class	Trans Type	Orig Amt	Tax	Amount	Balance	Notes	Cat1	Session	Entered	All
12/1/2022	Ager	David Ager	Tumbling Intermediate - Tues 7pm	Annual Membership	30.00	0.00	30.00	30.00	Annual fees for recreational classes - Dec renewal	Annual Fees	Winter 2023	SOlson	<input checked="" type="checkbox"/>
12/1/2022	Ager	Barbie Ager	Acro - Mon 6pm	Annual Membership	25.00	0.00	25.00	30.00	Annual fees for recreational classes - Dec renewal	Annual Fees	Winter 2023	SOlson	<input checked="" type="checkbox"/>
12/1/2022	Ager	Barbie Ager	Tumbling Beginner - Thurs 6pm	Annual Membership	20.00	0.00	20.00	30.00	Annual fees for recreational classes - Dec renewal	Annual Fees	Winter 2023	SOlson	<input checked="" type="checkbox"/>

Uncheck to leave a student or family out of the batch of fees.



If annual fees are posted in error, use Transactions > Delete Transactions to delete. See [Delete Transactions](#) for more information on deleting a fee.