# Post Late Fees (or Misc Fees)

**Post Late Fees/Misc Fees** allows you to post a fee to multiple families based on a selection of family criteria (location, status, current balance, etc.) and/or their students' current enrollment.



This function was designed for late fees but can be used to post any fee using the *Transaction Details to Post* options.

1. Go to the **Transactions** menu > **Post Transactions** > **Late Fees/Misc Fees**.

2. Make selections in the **Search Criteria** section to narrow down the families to which you want to post transaction fees. ***Note:*** The choices you make here are applied at the family level, e.g., *Who do you want to bill?* > I want to bill families with students enrolled in ballet classes. If you are posting a late fee, isolate which transactions you want to post late fees for using the *With Unpaid Transactions* section. Select a **Transaction Date From / Through**, a **Transaction Type**, and a **Transaction Sub-Type**. For example, if you only post late fees when tuition is late, you'd select, *Transaction Type: Tuition Fee (Debit)*.

## Post Late Fees/Misc Fees

← RETURN

**Search Criteria (Who do you want to bill?)** 🔍 Favorites 💾 Save Favorites ✕ Refresh ❓
Post Late Fees/Misc Fees will post a transaction to Families/Accounts based on the search criteria below.
Note: If Fees are posted in error, you can remove them through the Delete Tuition Fees or Delete Transactions function. ❓

**Current balance from** defaults to 1.00 but can be cleared to capture all families regardless of their balance.

Family Location [ ▾ ]
Status [ Active ▾ ]
Membership Type [ ▾ ] ePayment Schedule [ ▾ ]
Current balance from [ 1.00 ] through [ ]
Enroll date from [ mm/dd/yyyy 📅 ] through [ mm/dd/yyyy 📅 ]

**With Students Currently Enrolled in:**

Use this section to narrow down the list of families based on the enrollment of their students.

Enrolled in Session [ ▾ ]
Enrolled in Category1

| Category1 | Category2 | Category3 |
|---|---|---|
| Ballet | Beginner | 01Mon |
| Camp | Class Level | 02Tues |
| Charitable Donations | Early Childhood | 03Wed |
| Cheer | Elementary | 04Thurs |
| Competition Fee | Intermediate | 05Fri |
| Convenience Fee | Mighty Tots | 06Sat |

Select one or more classes by holding the CTRL key

Or choose one or more classes
Ballet - Beg - MWF (2023)
Ballet - Beg - MWF (2024)
Ballet - Beginner Tues/Thur (2024)
Ballet - Beginner Tues/Thur (2023)
Ballet - Foundations - Th (2023)
Ballet - Foundations - Th (2024)
Ballet - Foundations Tue/Fri (2024)  ▾ more less
Select one or more classes by holding the CTRL key

**With Unpaid Transactions:**

Use this section to further drill down to only families with specific unpaid transactions.

Transaction date from [ mm/dd/yyyy 📅 ] through [ mm/dd/yyyy 📅 ]

Transaction Type

| Transaction Type | Transaction Subtype |
|---|---|
| Late Fee (Debit) | Apr |
| Adjustment (Debit) | Aug |
| Annual Membership (Debit) | Dec |
| Booster Fee (Debit) | Feb |
| Competition Fee (Debit) | Jan |
| Convenience Fee (Debit) | Jul |

3. Use **Transaction Details to Post** in the lower section to tell Jackrabbit how to post the fee transaction (date, type/sub-type, amount, taxable, note, category, and session) and whether you want the fee to post per *Family/Account*, per *Active Student*, *Per Student That Meets Criteria*, or per *Student/Per Class*.

- If you post the fee per **Active Student** and a *family that meets the search criteria* has two active students, Jackrabbit will post the fee twice - once for each active student in the family, even if the student doesn't meet the criteria selections.

- If you post the fee per **Family/Account**, Jackrabbit will post the fee once to each family that meets the criteria.

- When you opt to post only to **Students That Meet Criteria**, Jackrabbit will only post a fee for those students who fit the criteria selected in the *Who do you want to bill?* section regardless of how many other active students are in the family.

- Posting the fee per **Student Per Class** will post the fee to students for every class they are currently enrolled in that meets the criteria.

4. Select **Use duplicate fee detection** if you want Jackrabbit to search for late/misc. fees already posted. The duplicate fees will appear in *Preview Fees* highlighted in yellow. You decide if you want to post the duplicate fees.

5. Click **Preview Fees**. This is a preview only. No fees will be posted until you click **Post Fees.**

# Preview Results and Post Fees

1. Review the results to confirm the fees are accurate.

2. Clear the checkboxes in the last column for items you do not want to post a fee for.

3. Click **Post Fees**. In the pop-up box that says, *This will create transactions for all selected families. Continue?*, click **OK**. Jackrabbit displays a list of the fees posted to accounts.

### Preview Late Fees/Misc Fees

←RETURN | ✓POST FEES | ✗CANCEL

**Preview Results**

Process created 149 transaction(s) based on criteria.

**149 transaction(s) are set to post.**

**Preview Counts**

Legend: Duplicate fee detected based on Transaction Type, Transaction Date, Fee Amount, Student, and Class

Family/Accounts: 84
Student: 110
Class: 35

Check all duplicates | Uncheck all duplicates

View 1 - 149 of 149 | 🖶 Print | ⧉ Export | ⟳ Refresh

| Date | Family | Student | Class | Trans Type | Trans Sub Type | Orig Amt | Tax | Amount | Balance | Notes | Cat1 | Session | Entered By | All ☑ |
|------|--------|---------|-------|-----------|----------------|----------|-----|--------|---------|-------|------|---------|-----------|-------|
| 12/15/2023 | Ager | Dani Ager | Cheer-Rec - Adv - F | Competition Fee | | 75.00 | | 75.00 | 75.00 | | | | LWallace | ☑ |
| 12/15/2023 | Agar | Whitney Agar | Guitar - Hannah - Wed - 3pm | Competition Fee | | 75.00 | | 75.00 | 0.00 | | | | LWallace | ☑ |
| 12/15/2023 | Ager | Dani Ager | Cheer-Team - Adv - M | Competition Fee | | 75.00 | | 75.00 | 75.00 | | | | LWallace | ☑ |
| 12/15/2023 | Ager | Dave Ager | Dolphins - Adv - M | Competition Fee | | 75.00 | | 75.00 | 75.00 | | | | LWallace | ☑ |



*If late/misc fees are posted in error, use* Transactions > Delete Transaction > Transaction Fees *to delete them. See* **Delete Transactions** *for more information on deleting a fee.*