Example of Split Payment - Entire Balance Paid (Check & Cash)

Last Modified on 08/30/2021 12:14 pm EDT

A family owes \$101.25 and wants to pay \$25 with cash and the remaining with a check. The transaction date is 7/7/2020.

- 1. Click the **Payment/Credit** button in the family record to open the **Payment/Credit Transaction Entry** page.
- 2. Adjust the Trans Date to 7/7/2020 (defaults to the current date).
- 3. Set Method to Cash.
- 4. Enter a Payment of 25.00.
- 5. Click **Apply Amt** field for fees to be paid.
- 6. Click Save & Make Another Payment. The Payment/Credit Transaction Entry window will re-open.

Payment/Credit Transaction Entry											
Cash, Checks, C	Other Credits	û Make Anothe	Payment	ePayments in Ja	Acct on File	I Use Net	w Card				
Family/Acct Campbell View Transaction History 6647 Georgia Street Huntersville, NC 28078 Home Phone (704) 555-6671 Balance 101.25 Trans Date* 7/7/2020 Receipt Receipt Transaction Type Payment Subtype Method* Cash Apply to Newest Fees First Payment 25,00											
N	ote			🗎 Chk#		Apply to Oldest Fees First (within last 12 months) Applied Amount: 2:					
ll Unpaid Charges/Fe	ees						Apply to Oldest Fees	First	Unapplied Amoun	t 0.00	
Date	Type Subtype	Note	Student	Class/Event	Orig Amt	Discount	Тах	Amt	Unpaid	Apply Amt	
05/01/2020	Tuition Fee May	May	Lena Campbell	Tumbling L2 - Mon óom	67.50	0.00	0.00	67.5	0 33.75	0.00	
03/01/2020	Tuition Fee March	March	Lena Campbell	Tumbling L2 - Mon ópm	67.50	0.00	0.00	67.5	0 67.50	25.00	
										6	

- 7. Adjust the Trans Date to 7/7/2020 (defaults to the current date).
- 8. Set Method to Check and enter Chk# 1234.
- 9. Enter Payment of 76.25.
- 10. Click **ApplyAmt** field for fees to be paid.
- 11. Click Save Payment.

Paymer	nt/Credit Tra	ansactio	on Entry									
Cash, Checks, O	ther Credits			ePayments in Jac	krabbit							
Save Pay	vment ✓ Save &	Make Anothe	r Payment	I Use Card/	Acct on File	ile 🔤 Use New Card						
Family/Ac	ct Campbell 6647 Georgia Street Huntersville, NC 28078 Home Phone (704) 555-	View Transaction	History									
Trans Dat	te* 7/7/2020 🗰 🗌	Receipt		7			Balance	76.25				
Transaction Ty	pe Payment 🗸	Subtype	✓ Method	Apply to Newest Fees First Payment: 76.25								
Note Chk# 1234							Apply to Oldest Fees First (within last 12 months) Applied Amount: 76.2:					
Uppaid Charger/Fe	~						Apply to Oldest Fees	First	Unapplied Amount	0.00		
Date	Type Subtype	Note	Student	Class/Event	Orig Amt	Discount	Тах	Amt	Unpaid	Apply Amt		
05/01/2020	Tuition Fee May	May	Lena Campbell	Tumbling L2 - Mon ópm	67.50	0.00	0.00	67.50	33.75	33.75		
03/01/2020	Tuition Fee March	March	Lena Campbell	Tumbling L2 - Mon ópm	67.50	0.00	0.00	67.50	42.50	42.50		
										1m		

The Family Record

The *Transactions* tab shows the payment split by payment method, a \$25 cash payment, and a \$76.25 check payment. The *Current Balance* is 0.00.

Family: Campbell												
← RETURN SAVE CHANGES												
Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email Email Schedules Submit Absences											Submit Absences	
Sum	Summary Contacts Classes Events Transactions Billing Info Misc Notes (0) Resources (0)											
View Transaction History View Unapplied Credits & Unpaid Fees												
Current Balance 0.00 FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT												
Last 20 (Most Recent) Transactions Payment is broken down												
View 1 - 5 of 5 Print Ø Refresh 11 columns hidden Show/Hide Co							de Columns	Restore Columns by Payment Method (Pmt Meth).			'mt Meth).	
				Date	Туре	Orig Amt	Amt	Balance	Pmt Meth	Date Paid	Student	Class/Event
ø	T	S	R	7/7/2020	Payment	-76.25	-76.25	0.00	Check 1234	7,7/2020		
ø	T	S	R	7/7/2020	Payment	-25.00	-25.00	76.25	5 Cash	7/7/2020		
ø	T	G		5/1/2020	Tuition Fee	67.50	67.50	101.25	Check 1234	7/7/2020	Lena Campbell	Tumbling L2 - Mon 6pm