

Manage Credit Card & Bank Account ePayment Settings

Last Modified on 06/13/2024 10:03 am EDT

To customize the credit card and bank account settings for Online Registration (new customers) and for the Parent Portal (existing customers), go to the **Gear** icon > **Settings** > **ePayment** and click **Manage Settings** in the Credit Card & Bank Account Settings section.

Expand/Collapse All

Expand each section to learn more about the settings.

Your Payment Partner

The Payment Partner page in the Credit Card & Bank Account Settings displays contact information for your Payment Partner and gives you quick access to your **Virtual Terminal** or **Jackrabbit Pay Console**.

Cards Accepted for ePayments

You select which cards you will accept for ePayments. Jackrabbit offers the option to maintain up to three credit cards on file for each family. One card can be selected as the customer's Primary Card (the card the family considers their main credit card and the card used in Transactions > Process ePayments).

If you want to allow your families to store up to three credit cards on their account, set *Allow 3 credit cards per family/account* to **Yes**. See **Multiple Cards per Family** for more information.

These settings control what credit cards you allow to be entered in Jackrabbit and affect your Online Registration Form and the Parent Portal. If a family attempts to use a card that is not accepted, an error message will be received.

The settings selected in the above image will display like this:

| | |
|---------------------------------|--|
| Online Registration Form | |
| In the Parent Portal | |

If you make any changes with your Payment Partner regarding the payment types you accept, be sure to update these checkboxes.

Online Registration ePayment Settings

If you will use or already use, **Online Registration** for your new customers, decide whether your customers will be required to enter credit card or bank account information.

- Set either *Credit card required?* or *Bank account required?* to **No** to hide the related fields on your **Online Registration Form**.
- When both *Credit card required?* and *Bank account required?* are set to **Yes**, define whether only one is required or if both payment methods must be entered.

Before you can collect your customer's credit card or bank account information, you must have **completed your account setup with a Payment Partner**. In addition, you must receive confirmation from Jackrabbit Support that you are ready to start processing ePayments.

Parent Portal ePayment Settings

If you plan to use or are already using the Parent Portal for your existing customers, clarify whether they can make payments and update their credit card or bank account details through their portals.

Accepting Payments & Managing Payment Methods

| | |
|---|--|
| Which payment method does your business prefer? | Define which ePayment Methods you accept: <ul style="list-style-type: none">• I only accept credit/debit card payments• I only accept ACH payments (bank account drafts)• I accept both credit/debit card and ACH payments |
| Can parents make payments through the Parent Portal? | Set this to Yes to allow parents to submit payments through their portals. |

| | |
|---|---|
| <p>When payments can be made in the Parent Portal, parents can:</p> | <p>Four payment preference options control how your families can make payments in the Parent Portal:</p> <ul style="list-style-type: none"> • Only pay balance in full Parents must always pay the entire balance on their account. This option does not allow parents to make partial payments or pick which payments to pay. • Select which fees to pay in full Parents can select which fees to pay. However, they must pay the fee in full. • Select which fees to pay (in full or partial amount) Parents can change the payment amount and can select which fees to pay. • Change payment amount (payment is applied to oldest fees) Parents can change the payment amount, but they can't select which fees to pay; the payment is always applied to the oldest fee. Parents can pay ahead (make a prepayment) when the family's balance is 0. If the family has a balance owing, a portion of the payment must be applied to clear the balance. |
| <p>Do you require parents to save a payment method if they are currently enrolled or before enrolling in classes?</p> | <p>When set to Yes, parents can only view and enroll students in classes or events in their portals when they have a valid payment method saved on their Family record. Parents with expired or missing payment information will be prompted to update it upon login before being able to navigate further.</p> <p>TIP: You can omit individual families from requiring a payment method on file to navigate beyond login in their Parent Portals (e.g., to view schedules). Go to the Family record > Billing Info tab and select Omit Family from requiring a Payment Method on File... This can be helpful for situations like scholarship students. Search for families you've omitted using the <i>Omitted required payment method</i> filter on the All Families page.</p> |
| <p>How do you want any credit/debit card or bank account information on a parent's account to be managed in the Parent Portal?</p> | <p>For each payment method you accept, define what actions parents can take with their payment information.</p> <ul style="list-style-type: none"> • Choose Parent can add & update to allow your customers to add and edit payment information in their portals. • Select Parent can view only to allow your customers to see the payment information, but not edit or delete it. • When credit card or bank account information is Hidden from parent, customers cannot see any payment information. |

| | |
|--|--|
| <p>Would you like to be emailed when a parent makes a payment in the Parent Portal?</p> | <p>Set this to Yes to have an email notification sent to your organization when a parent makes a payment in their portal.</p> <p>Go to the Gear icon > Settings > Parent Portal > Settings (tab) > Communication (section) to enter the email address(es) you want to receive payment notifications.</p> |
|--|--|

Shopping Cart Preferences

| | |
|--|--|
| <p>Do you want to require payment upon checkout when parents are enrolling using the Parent Portal?</p> | <p>When set to Yes, parents will be required to make payment when enrolling in classes or events. Learn more about Requiring Payment in the Parent Portal</p> |
| <p>Can parents checkout using a payment method not previously saved?</p> | <p>If you want to allow parents to check out using a card or bank account they don't already have saved in their <i>Family</i> record in Jackrabbit, set this to Yes. This gives them the option to use a 'one-time' payment method for their checkout experience. While they can save the card/account, they aren't required to do so.</p> |

Frequently Asked Questions

Q. *If a family has both a credit card and a bank account on file, what determines which one is used?*

A. The *ePayment Method* field determines whether Jackrabbit will attempt to process the credit card or the bank account. This field is located in the Family record on the family Billing Info tab.

If both bank account and credit card details are entered for a family and the *ePayment Method* field is left blank, Jackrabbit will default to the credit card when an individual transaction is attempted. In a batch transaction (using Transactions (menu) > Process ePayments), the family will be left out of the batch if the *ePayment Method* field is left blank.
