

Require Payment in the Parent Portal

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Jackrabbit gives you the option to require payment when parents enroll students in classes or events in the Parent Portal. Like purchasing an item online, the enrollment will not be complete until payment is successfully processed. This can help eliminate late payments and calls from parents while saving you time!

- Require payment for new enrollments
- Ensure payment to secure enrollment
- Process payments during the enrollment process

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Settings to Require Payment in the Parent Portal

To require payment in the Parent Portal you must first be set up for ePayments in Jackrabbit. [Learn more here.](#)

There are several settings that control the ability to require payment in the Parent Portal.

Location of Setting	Setting
<p>Gear (icon) > Settings > Tuition & Discounting > Tuition Fee Settings (section) > Manage Fee Settings (button)</p>	<p>By Class Fee Settings and By Total Hours Settings</p> <p>How do you want to post tuition when a student enrolls during online registration, quick registration, via the enroll button/links, or via the Parent Portal?</p> <ul style="list-style-type: none">In order to require payment, fees must be posted when a student is enrolled in the Parent Portal. Do not post tuition should NOT be selected.Learn more about Tuition Fee Settings.

<p>Gear (icon) > Settings > ePayments > Credit Card & Bank Account Settings (section) Manage Settings (button) > Parent Portal Settings (left menu)</p>	<p>Accepting Payments & Managing Payment Methods</p> <p>Can parents make payments through the Parent Portal?</p> <ul style="list-style-type: none"> • In order to require payment, you must first allow parents to make payments in their portal. Set this to Yes. • Learn more about Parent Portal ePayment Settings.
<p>Gear (icon) > Settings > ePayments > Credit Card & Bank Account Settings (section) > Manage Settings (button) > Parent Portal Settings (left menu)</p>	<p>Shopping Cart Preferences</p> <p>Do you want to require payment upon checkout when parents are enrolling using the Parent Portal?</p> <ul style="list-style-type: none"> • When set to Yes, the fees (tuition &/or registration) associated with the enrollment will automatically be processed with the parent’s default payment method when they complete the checkout process. <p>Can parents checkout using a payment method not previously saved?</p> <ul style="list-style-type: none"> • If you want to allow parents to checkout 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>Class Record > Summary (tab)</p>	<p>Exclude from requiring payment during Parent Portal enrollment</p> <ul style="list-style-type: none"> • When you require payment in the Parent Portal, both class enrollments and event enrollments are included. There may be times, however, when you want to omit a specific class from requiring payment during checkout in the portal. • Select Exclude from requiring payment during Parent Portal enrollment to exclude payment processing for a specific class during Parent Portal enrollment. The parent will see messaging in the Cart to indicate that payment for the class will be required at a later date.

<p>Events > Event Type > Summary (tab)</p>	<p>Payment Method Information</p> <p>Omit this Event Type from requiring payment during Parent Portal enrollment</p> <ul style="list-style-type: none">• When you require payment in the Parent Portal, both class enrollments and event enrollments are included. There may be times, however, when you want to omit a specific Event Type from requiring payment during checkout in the portal.• Select Omit this Event Type from requiring payment during Payment Portal enrollment to exclude payment processing for a specific Event Type during Parent Portal enrollment. The parent will see messaging in the Cart to indicate that payment for the event will be required at a later date.• Learn more about Events Online.
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Step Through the Checkout Process in the Parent Portal

Let's have a look at the parent experience when you require payment in the parent portal.

1. Select students from the list to enroll them in the selected classes and events.
 - Class Policies (when applicable) must be agreed to before adding the class to the cart.
 - Click **Add** to add the class to the card.
2. Select **Continue Shopping** to add more classes to the cart, or select **Checkout Now**, and the **Cart** is calculated.
 - If any of the students who were enrolled have a **Student Fixed Fee** in place, you will be notified that no fixed fees will be posted.

3. You are then presented with a Cart summary detailing the fees and any discounts and taxes, if applicable.
 - The Cart is divided into sections when a Student Fixed Fee is involved and breaks down the *Items typically covered by Student Fixed Fee* and *Items not covered by fixed fees*.
 - If you enrolled in an event that is set to *Omit this Event Type from requiring payment during Parent Portal enrollment*, the event card will highlight that **Payment will be processed once fees have been reviewed**.
 - If payment is not required for Registration Fees in the Parent Portal, the fee card will highlight that **Payment will be processed once fees have been reviewed**.

4. Proceed to the *Make a Payment* page where you can select from the payment methods saved in the *Family* record and submit the payment.

Note: When you send the payment, you are re-agreeing to the organization's policies and agreements.

- If parents are allowed to checkout using a payment method not previously saved, an *Add New* button can be used to process the payment to a new card. You will have the option to save the new card to the *Family* record and optionally make it the primary card.

5. Payment is processed and a confirmation displays the details, including the Transaction ID. An email confirmation is sent to the person who was logged in to the Portal when the payment was made.

An Enrollment Summary displays the details of the enrollments and payment details. You have the option to print or email a receipt. When you opt to email the receipt, it can also be viewed in the Portal, in the *My Messages* section. Additionally, it is recorded in the *Family* record > *Misc* (tab) > *View Sent Emails*.

Frequently Asked Questions

Q. *Is it possible to require families to have a valid payment method on file before enrolling in classes in the Parent Portal without requiring them to make payments at the time of checkout?*

A. Yes, you ensure that families have a valid payment method on file before enrolling in classes through the Parent Portal without requiring them to make a payment during checkout. This approach ensures you have the security of a valid payment method on record while maintaining the flexibility to review enrollments before processing payments.

To get this set up, go to the **Gear** icon > **Settings** > **ePayments** > **Parent Portal Settings** and toggle **Do you require parents to save a payment method if they are currently enrolled or before enrolling in classes?** to Yes. Then, when a family without a valid payment method on file logs in to their Parent Portal, they will be prompted to update it before they can proceed.

TIP: You can omit individual families if needed using the *Omit Family from requiring a Payment Method on File...* setting on the Billing Info tab of their Family records. Search for families you've omitted using the *Omitted required payment method* filter on the All Families page.

Q. *Is it possible to not require payment for a specific class or a specific event?*

A. Yes, it is possible to set certain classes or events to be omitted from requiring payment. On the *Class* record > *Summary* tab select **Exclude from requiring payment during Parent Portal enrollment** to exclude payment processing for a specific class during Parent Portal enrollment. On the *Event Type* > *Summary* tab select **Omit this Event Type from requiring payment during Parent Portal enrollment**.

Q. *What happens if a card is declined?*

A. If a payment is declined, the enrollment is not added for the student(s) and any associated fees are not posted. The payment must be successful in order for the parent to complete the enrollment checkout process. The parent will see a notification that there was a problem with the payment and will be returned to the Cart where they can checkout with a different payment method.

The Primary Phone number shown on the Parent Portal notification (below) is found under the Gear (icon) > Account > My Account > Organizational Details (left menu) > General > Primary Phone, and it's the Primary Phone listed for your organization.

Q. *What about other fees that the parent may already owe?*

A. The payment only pays (processes) the fees in the Shopping Cart and the payment is linked to those fees.

Q. *What happens if a family has a credit balance on their account?*

A. Credit balances on a family's account **will not** be deducted from the amount owed during enrollment in the Parent Portal.
