

Automate Tuition Posting - Schedule Fees to Post Later

Last Modified on 09/13/2024 3:53 pm EDT

What is automation? Simply put, automation uses technology to perform tasks efficiently and safely. Because automated tasks are performed without human intervention, they save time, eliminate the possibility of human error, and ensure accuracy and consistency.

With Jackrabbit, you can automate your tuition fee posting by scheduling the fees to post later. A fee posting task can be scheduled as a one-off or as a recurring task.

Check your **Time & Date Settings**, including the **Daylight Saving dates**, to ensure tuition fees are scheduled correctly. Go to the *Gear icon > Settings > General > Organization Defaults*.

Create a Task - Schedule a Tuition Fee Posting

The automation of tuition fee posting starts with the **Post Tuition Fees** feature.

- 1 Go to **Transactions** (menu) > **Post Tuition Fees**.
- 2 Choose **Post Later** in the *Post Tuition Fees - Post Setting*. Select the remaining criteria and settings that capture the fees you want to schedule to post at a later date. Learn more about the Post Tuition Fees [criteria and settings](#).
- 3 Click one of these options:
 - **Preview Fees** (green button) - opens the **Preview Tuition Fees Criteria** page. This page is a snapshot of the selected criteria on the date/time you are viewing it.
Note: When the Tuition Fees post at a later date, the Transactions and Amounts will vary from the Preview Fees page depending on the date and time the tuition fees actually post.
 - **Post Later** (blue button) - this skips the next two steps and opens the **Schedule Tuition Fee Task** window in step 6.
- 4 Review the fees that are set to post. Return to the Post Tuition Fees page to make any necessary changes.

5 Click **Post Later** to open the *Schedule Tuition Fee Task* window.

6 Complete the details for the task, then click **Next**.

Name - Give the task a descriptive name. This name appears in the *Task* column of the *Task Management* page.

Schedule Starts - This date will default to the date and time chosen in the criteria settings. You can change the date here if you have a preferred start date and time.

Recurrence - From the *Repeats* drop-down, select from:

- **Monthly/Weekly on the *date @ time***
(the *date* and *time* are based on the scheduled start date)
- **Monthly/Weekly on the 1st *day of week @ time***
(the *day of week* and *time* are based on the scheduled start date)
Example - the start date falls on a Thursday. This option will post on the 1st Thursday of each month.
- **Custom**
Use this option to change how often the posting repeats. Instead of monthly or weekly, you can choose to post at a different interval, such as every 2 or 3 months (select from the drop-down list).

Ends On - Define when the task should end. The task end date is inclusive and will run on the end date.

- **Never** - the task will run indefinitely
- **On** - select a specific date with the *Calendar* icon
- **After** - a specified number of occurrences

7 Choose whether or not you want to send an email reminder to your [organization's email address](#). If you want to send a reminder, specify the number of days in advance it should be sent. Click **Save**. A confirmation window lets you know your task has been created and displays the details. Click **Close**.

When you close the confirmation window, you are taken to the Task Management page, where you

can view, edit, pause, or delete a scheduled task. Learn more about [Automation Task Management](#).

If you want to exclude a family when scheduling a tuition posting task, select the [Omit Family from Transactions > Post Tuition Fees](#) setting on the *Billing Info* tab of their *Family* record.
