

Add Family Balances to Imported Data

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If your imported data files don't contain the current family balance, you can enter this information manually for all families that have either a debit or credit sitting on their account at the time you begin using Jackrabbit. First you must add additional drop-downs lists to use.

Create Transaction Types Drop-down list:

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu) > **Transaction Types**.
2. Add a *Carryover Balance (Debit)* and a *Carryover Balance (Credit)* to your Transaction Types list.
3. Click **Save Changes**.

For families that have a balance due:

- On the family page, use the *Make Sale/Post Fee* button and post the fee for the carryover amount they owe. Select *Carryover Balance (Debit)* as the Trans Type.

For families that have a credit on their account:

- On the family page, use the *Payment* button and record a payment for the carryover credit amount they have. Select *Carryover Balance (Credit)* as the Trans Type.
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