

Link a Payment to a Fee

Last Modified on 10/19/2021 4:08 pm EDT

Now that you know [what fee linking is and why it is important](#), let's take it a step further.

How Payments are Linked to Fees

When a fee is posted to a family's account, it remains unlinked until payment has been received and is linked to it, i.e., the linking is done from the payment, not from the fee. An Unpaid Fee is easily recognizable by the pink *Date Paid* field. This field will remain pink until the fee is completely paid.

Family: Harding

← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email Email Schedules Submit Absences Merge Family

Summary Contacts Classes Events **Transactions** Billing Info Misc Notes (0) Resources (0)

View Transaction History View Unapplied Credits & Unpaid Fees

Current Balance **120.00**

Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT

Last 20 (Most Recent) Transactions

View 1 - 2 of 2 Print Refresh 8 columns hidden Show/Hide Columns Restore Columns

	Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	Date Paid	Cat1	Student	Class/Event	User
	10/6/2021	Tuition Fee	85.00	85.00	120.00				Cheer	Coreen Harding	Cheer Essentials	HCenter
	10/6/2021	Registration	35.00	35.00	35.00				Registration Fee			HCenter

When a payment is made, you'll decide what fee the payment is for and apply it to those fees from the *Payment/Credit Transaction Entry* screen.

Payment/Credit Transaction Entry

Cash, Checks, Other Credits ePayments in Jackrabbit

Save Payment **Save & Make Another Payment** **Use Card/Acct on File** **Use New Card**

Family/Acct **Harding** View Transaction History

2643 Fir Street
Huntersville, NC 28078
Home Phone (704) 555-4685

Trans Date: 10/6/2021 Receipt

Transaction Type: Payment Subtype: Method: Check

Note: Chk#: 420

Apply to Newest Fees First Payment: 120.00

Apply to Oldest Fees First (within last 12 months) Applied Amount: 120.00

Apply to Oldest Fees First Unapplied Amount: 0.00

Balance: 120.00

All Unpaid Charges/Fees

Date	Type Subtype	Note	Student	Class/Event	Orig Amt	Discount	GST	Amt	Unpaid	Apply Amt
10/06/2021	Tuition Fee		Coreen Harding	Cheer Essentials	85.00	0.00	0.00	85.00	85.00	85.00
10/06/2021	Registration				35.00	0.00	0.00	35.00	35.00	35.00

The family's list of *Transactions* still shows the fees (in white), but the *Date Paid* fields now contain a date and are no longer pink.

Family: Harding

[← RETURN](#) [SAVE CHANGES](#) [DELETE](#)

[Make Sale/Post Fees](#) [Payment/Credit](#) [Refund](#) [Statement](#) [Add Student](#) [Add Contact](#) [Archive Family](#) [Family Name](#) [Email](#) [Email Schedules](#) [Submit Absences](#) [Merge Family](#)

[Summary](#) [Contacts](#) [Classes](#) [Events](#) [Transactions](#) [Billing Info](#) [Misc](#) [Notes \(0\)](#) [Resources \(0\)](#)

[View Transaction History](#) [View Unapplied Credits & Unpaid Fees](#)

Current Balance 0.00

Legend FEE/CHARGE PAYMENT/CREDIT UNPAID FEE UNAPPLIED CREDIT

Last 20 (Most Recent) Transactions

			Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	Date Paid	Cat1	Student	Class/Event	User
			10/6/2021	Payment	-120.00	0.00	0.00		Check 420	10/6/2021				HCenter
			10/6/2021	Tuition Fee	85.00	0.00	120.00		Check 420	10/6/2021	Cheer	Coreen Harding	Cheer Essentials	HCenter
			10/6/2021	Registration	35.00	0.00	35.00		Check 420	10/6/2021	Registration Fee			HCenter

Other details about the payment have also been added to the fee line (Payment Method, Check #, Notes, etc.).

A payment line has been added (in yellow) and the fees and payment are linked. To see what payments are linked to fees click the **Link** icon on any yellow payment line.

			Date	Type	Amt	Unpaid Amt	Balance
			10/6/2021	Payment	-120.00	0.00	0.00

Transaction Links Details

Payment: Payment: 120.00 Unapplied: 0.00
Date: 10/06/2021 Method: Check

	Date	Type	SubType	Amount	Amt Paid	Note	Pmt Meth	Check#	Date Paid	Cat 1	UserID
	10/6/2021	Tuition Fee		85.00	85.00		Check	420	10/6/2021	Cheer	HCenter
	10/6/2021	Registration		35.00	35.00		Check	420	10/6/2021	Registration Fee	HCenter

[Close](#)

To change the fees that a payment was applied to, click the **Pencil** icon on the payment line to open the *Edit Transaction* window. There you will be able to view the linked fees (as in the above screenshot).

Use the **Unlink Fee(s)** button to unlink the payment from the fees it had been applied to. Then select the **ReApply Payment** button to open the *Re-Apply Payment/Credit Transaction* window where you can choose the fees you want to put the payment towards.

Frequently Asked Questions

[Expand/Collapse All](#)

Q. Is there a way to 'unlink' or 'unapply' a payment from a fee?

A. Yes, follow these steps to unlink a payment from a fee.

1. Locate the correct family.
2. In the Family's *Transactions* tab, click the **Pencil** icon next to the payment you want to unlink from a fee.
3. This will open the *Edit Transaction* window. Click the **UnLink Fee(s)** button.
4. In the *UnLink Payment from all Linked Fees?* window, click **OK**.
5. Click **OK** again.
6. If the *Edit Transaction* window remains open, click **Close** in the upper right corner.

The payment has been unlinked from fee(s).

Q. *Is there a way to 'unlink' a fee from a payment?*

A. Yes, follow these steps to unlink a fee from a payment.

1. Locate the correct Family.
2. In the Family's *Transactions* tab, click the **Pencil** icon next to the fee you want to unlink from a payment.
3. This will open the *Edit Transactions* window. Click the **UnLink Payment(s)** button.
4. In the *UnLink this fee from Payment?* window, click **OK**.
5. Click **OK** again.
6. If the *Edit Transaction* window remains open, click **Close** in the upper right corner.

The fee has been unlinked from the payment.

Q. *I linked a payment to the wrong fee. How can I fix it?*

A. Follow these steps to unlink a payment and relink it to the correct fee.

1. Locate the correct Family.
 2. In the Family's *Transactions* tab, click the **Pencil** icon next to the payment you want to unlink from a fee.
 3. This will open the *Edit Transaction* window. Click the **UnLink Fee(s)** button.
 4. In the *UnLink Payment from all Linked Fees?* window, click **OK**.
 5. Click **OK** again.
 6. Click the **ReApply Payment** button.
 7. In the *Re-Apply Payment Transaction* window, click the **Apply to Oldest Fee First** or choose a specific fee by clicking in its *Apply Amt* column.
 8. Click **Save Payment**.
-