

# Automate ePayments - Schedule ePayments to Process Later

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Take control of your time by scheduling ePayments to process automatically for multiple families with Jackrabbit's Automated ePayments.

Create a task to define when payments process and, for recurring payments, set the frequency and end date.

Enable an optional email reminder to receive a notification before a batch processes, allowing time for adjustments.

Manage all scheduled tasks from the **Task Management** page to view, edit, pause, or delete them.

It's really that simple! With just a few steps, you can automate ePayment processing and streamline your workflow.

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## Schedule an ePayment Task

To begin automating ePayments, create a scheduled task that determines when payments will be processed.

1. Go to **Transactions** (menu) > **Process ePayments**.
2. In the Process Setting section, select **Process Later** and enter the date and time for the scheduled task to begin.  
Note: Avoid scheduling ePayments too close to your gateway settlement time to allow time to review and address any potential issues before payments settle.
3. Configure your **Payment Settings**.
  - Use the **Apply Payments to** setting define the order in which ePayments are applied to fees.
    - *Newest Fees First* - Applies payments to the most recently posted outstanding fees.
    - *Oldest Fees First (within last 12 months)* - Applies payments to the oldest fees from the past year, helping to clear unlinked transactions that may clutter customer statements.
    - *Oldest Fees First* - Applies payments to the oldest outstanding fees on the family's account.
  - Control how fees are selected for processing with the **Payment Collection** setting.
    - *Future Fees* - Decide how to process future fees: collect all, none, only those within the same month, or only those within a set number of days of the processing date.
    - *Unpaid Fees* - Define how to handle ePayments for families with credits:

collect unpaid fees only up to the account balance or collect the full amount owed, ignoring credits.

4. Use the **Family Criteria** to select a specific family or group based on *ePayment Method*, *Membership Type*, *ePayment Schedule*, or *Location*. You can also opt to include families with credit balances, inactive accounts, or recent transaction declines.  
Tip: To exclude a family from ePayment processing, select the *Omit Family from Transactions > Process ePayments* setting on the Billing Info tab of their Family record.
5. Choose **Transaction Criteria** to focus on specific fees. Filter by *Transaction Type* and *Sub-Type*, *Session*, *Category*, or choose specific *Classes* to collect only what's needed.
6. Select **Preview ePayments** to review the families and amounts scheduled for processing based on your selected criteria.

The preview reflects the families and amounts that meet your criteria at the time it's generated. These may change before the scheduled processing date.

7. Use the **Return** button to go back to the settings and make adjustments. When all changes have been made, select **Process Later** to open the task scheduler.
  - Complete the details for the task, and 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 with the Process Setting.

**Recurrence** - From the *Repeats* drop-down, define how often the task will run. The *day of the week*, *date*, and *time* are based on the *Schedule Starts* date above. The Custom option allows flexible intervals, like every 2 weeks or 3 months.

**Ends On** - Define when the task should end. The task end date is inclusive, i.e., any tasks scheduled to run on the end date will run.

- Decide whether to send an email reminder to your **organization's email**

- Decide whether to send an email reminder to your [Organization Email address](#). If enabled, set how many days in advance it should be sent. Click **Save** to confirm.

- o A confirmation window advises that 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.

Check your [Time & Date Settings](#) , including the Daylight Saving dates, to ensure ePayments are scheduled correctly. Go to the **Gear** icon

> **Settings** > **General** > **Organization Defaults**.

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