

Automate ePayments - Schedule ePayments to Process Later

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Save valuable time by scheduling ePayments to process automatically for multiple families with Jackrabbit's Automated ePayments!

Overview

The automation of ePayment processing starts with the **Process ePayments** feature (*Transactions* menu > *Process ePayments*). Automation tasks are created when **Process Later** is selected on the *Process ePayments* page in the *Process Setting* section.

The scheduled ePayment tasks define when the ePayment processing will start, and for recurring tasks, how often they will run and when they will end. An optional email reminder can be sent to give you the heads up that a batch of ePayments will be processed soon, allowing you to make any necessary changes before processing. Scheduled tasks are managed (view, edit, pause, delete) from the **Task Management** page.

The Details

The first step in automating ePayments is to create a task to schedule the processing.

1. Go to **Transactions** (menu) > **Process ePayments**.
2. Choose **Process Later** in the *Process Setting* section.
 - o Enter the date and time you want this task to first run as the Schedule Start **Note: Don't schedule ePayments to process too close to your Gateway Settlement Time to allow time to address any concerns prior to payments settling.**
3. Select the criteria and the unpaid fees you want to schedule to process at a later date. Learn more about the **Process ePayments criteria and settings**. **TIP:** If you want to exclude a family when using Process ePayments (*Transactions* menu), select the **Omit Family from Transactions > Process ePayments** setting on the *Billing Info* tab of their *Family* record.
4. Click the **Preview ePayments** button to review the families and amounts that would be processed that day based on your criteria choices. **Note: The exact families and amounts on the Preview ePayments page meet your chosen criteria and settings on the day the preview was generated and may change before the scheduled processing date.**

Preview ePayments Criteria: 8/28/2023 7:50 AM

← RETURN PROCESS LATER

Select **Process Later** to create an automation task.

TRANSACTIONS TOTAL AMOUNT FEES FAMILIES RECEIPTS

8 1,990.00 28 8 RECEIPT SETTINGS

Total ePayments Currency Total Fees Total Families

8 Selected

Legend:
■ Family Credit ■ Family Inactive ■ Omitted

Use the checkboxes to include or exclude only highlighted families at the top. Any family listed as omitted with a clear checkbox can't be unchecked.

<input type="checkbox"/>	STATUS	FAMILY	METHOD	BALANCE	PROCESS AMOUNT	DETAILS	
<input checked="" type="checkbox"/>	Active	Franklin	Abigail	Credit Card	-90.00	35.00	Details
<input checked="" type="checkbox"/>	Inactive	Morris	Rayan, Toby	Credit Card	115.00	115.00	Details
<input type="checkbox"/>	Active	Ager	Danielle, David	Credit Card	315.00	315.00	Details

5. Select **Process Later** to go directly to the task scheduler and skip the Preview.

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

Schedule ePayment Task

Name

Schedule Starts

Recurrence
 REPEATS

Ends On
 Never
 On
 After Occurrences

CANCEL

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. You can change it here if you have a preferred start date and time.

Recurrence - From the *Repeats* drop-down, select an option to define how often and when the task will run. The *day of the week*, *date*, and *time* are based on the *Schedule Starts* date above. Use the *Custom* option to change how often the posting repeats. Instead of daily/weekly/monthly, you can post at a different interval, for example, every 2nd week or every 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.

- **Never** - the task will run indefinitely
- **On** a specific date - select a 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**.
 - o A confirmation window advises that your task has been created and displays the details. Click **Close**.

Task Created: Monthly Team Payments

Frequency: Monthly on the 28th @ 11:50 AM

Next Run: Aug 28, 2023 @ 12:59 PM

Reminder: 1 day before task runs

[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](#).

Task Management

ALL TASKS >

TASKS

1/1
Tasks

By Type

Frequency

Daily Weekly Monthly Yearly Custom

Showing 1 of 1 Tasks [HELP WITH GRIDS](#)

	TASK	TYPE	FREQUENCY	NEXT RUN	ENDS ON
<ul style="list-style-type: none"> View Edit Pause Delete 	Monthly Team Payments	ePayment	Monthly on the 28th @ 11:50 AM	Thu, Sep 28, 2023 11:50AM	Never



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**.