Isolate families by specific billing frequency using Membership Type Share

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Issue/Question

How do I isolate specific families for specific billing frequencies?

Environment

Jackrabbit application

Resolution

One way to isolate specific families when billing tuition is to use Membership Type (on the Family record > Billing Info tab). For example, Membership Types might be Monthly, Annual, Semester, etc.

- 1. Create Membership Types by going to the Gear (icon) > Settings > General > Drop-down Lists (left menu).
- 2. Click Membership Type under Family from the choices on the left.
- 3. Use the Add Row button to add a new type.
- 4. Click Save Changes.
- 5. Add a Membership Type to a family on the Billing Info tab of their Family record. Choose a Membership Type from the drop-down list.
- 6. Click Save Changes.

Post tuition fees to specific Membership Types by selecting a type in the Membership Type field in Post Tuition Fees.