



Jackrabbit Technologies

Guide to Total ePay

9/1/2019

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Introduction

This is an exciting time for your organization! Imagine a month where all your families pay on time and it just took you a few minutes to collect their payments at the push of a button. Sounds like a dream? It's not!

In this step-by-step guide you will learn how to implement and enjoy the efficiency of Total ePay. This will provide you with the freedom to run your business without spending hours or days collecting payments.

This guide will include steps for organizations that already have ePayments set up, as well as organizations that do not. Just keep reading through all the steps to make sure you don't miss anything.

See what others are saying about Total ePay ...

[**Customer Testimonial to Total ePay**](#)

Step 1 - Choose an ePayment Partner

The first thing you will need in order to implement Total ePay is an ePayments account with one of our ePayment Partners, C&H Financial or SafeSave Payments.

They will provide you with a gateway and merchant processing account. Jackrabbit interfaces directly with the Gateway that in turn sends your data to the Merchant Processor. You will be able to see the status of all transactions through your Gateway Virtual Terminal. The Merchant Processor is responsible for making sure payments are made to your bank account. Depending on your plan and ePayment Partner, the Gateway may act as both Gateway and Merchant Processor.

Both ePayment Partners offer traditional plans and flat-rate, no monthly fee plans. They will be able to advise which plan will work best for you. They also offer meet or beat pricing and will provide you with a free quote.

C&H Financial Services, Inc.

Casey Cumming, Payment Processing Consultant
Email: JRSalesSupport@chfs.us
<http://chfs.us/>
Toll-free 855-602-2437, Ext 1

Safe Save Payments

Shane McMullen, Merchant Account Specialist
Email: smcmullen@safesavepayments.com
<https://www.safesave-payments.com/jackrabbit>
Toll-free 800-220-8611

There is more information about our ePayment partners on our [website](#).

Your new ePayment partner will set up your account and provide us with the proper credentials to link with Jackrabbit. We will then send you an email with a Get Started button to complete the setup within your database.

Step 2 – The Plan

The goal of Total ePay is to provide you with an effective and efficient way to collect your payments. Say “goodbye” to endless hours of posting payments manually!

The best part... there are only 2 things that absolutely must happen...

- Require all families to have a credit card or debit card* on file
- Monthly, use the power of eBatch to collect payments

Your parents are going to love this! They are busy and this gives them one less thing to worry about.

Benefits to following ‘The Plan’ to Total ePay...

- All payments will be integrated in Jackrabbit. You will not have to manually enter them (think “saves me hours”) or print receipts. All accounts will be updated accordingly.
- No more trips to the bank.
- No more long lines at the front desk.
- No more chasing down parents for payment.

Here are a few tips to help you customize your new marketing strategy with ease...

- Have your families enter their credit card information securely through the Parent Portal. This will save you a lot of time.
- IF you want your families to take more control, you can allow them to initiate the payment from the Parent Portal. Not to worry, if they don’t initiate the payment before the due date, you can still collect it during your monthly eBatch. There are several options for this that will be covered in the Settings step.
- Set an ePayment Schedule for families that pay at different times of the month.

Remember, your time is really valuable. The less time you or your staff spends entering payments manually and chasing accounts for payments, the more time you can spend running your business the way you want.

***Debit card processing is not available in all countries**

A note about Bank Drafts – Bank Drafts can also be a part of Total ePay. However, you must understand they are not processed in real time. They are always marked as “Approved” in Jackrabbit, but that does not mean they will be cleared. It takes 5-7 days to clear their banks and be deposited into your account. If there is an issue, there is no communication back to Jackrabbit. You must watch the Settlement emails you receive from your gateway and bank. Any adjustments must be done manually. For the most effortless processing experience, we recommend using credit/debit cards.

Step 3 – Settings

FOR NEW SETUPS ONLY

You will receive an email from the ePayments Team at Jackrabbit letting you know that everything has been set up on our end. You will need to take care of some settings within the database. Just click the Get Started button in that email. Don't worry, if you can't find your email, just go to **Tools>ePayments Wizard** to get started.

The ePayments Wizard will walk you through each setting that needs attention. We'll cover the importance of each setting below.

FOR EXISTING SETUPS

You can update your settings by going to **Tools>ePayment Settings**.

ePayments Settings

Manage your ePayments settings.

WHO CAN PROCESS VOIDS AND/OR REFUNDS?
Determine which of your database users will have permission to refund credit cards and/or void credit card payments.
[MANAGE PERMISSIONS](#)

CREDIT CARD & BANK ACCOUNT SETTINGS
Configure the credit card and bank account settings for Web Registration (new customers) and for Parent Portal (existing customers).
[MANAGE SETTINGS](#)

EMAIL NOTIFICATION SETTINGS
Your customers can be sent receipts in the event of a successful transaction and are alerted in the event a transaction is declined, voided, and/or refunded.
[MANAGE SETTINGS](#)



WHO CAN PROCESS VOIDS AND/OR REFUNDS?

All users are defaulted to being able to Edit Family Bank/CC info and Post CC Transactions. This is where you can determine if that is accurate or not and which users can process Voids and Refunds.

Who can access credit card & bank account information?

Determine which of your database users will have these permissions.

Current Users						
User ID	First Name	Last Name	Void on Card	Refund on Card	Edit Family Bank / CC	Post CC Transactions
eCommDemo3	Beatrice	Bunny	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
eCommDemo4	Ramona	Rabbit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Staff123	General	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CREDIT CARD & BANK ACCOUNT SETTINGS

PAYMENT PARTNER

This page is mostly informational. It includes all the contact information for your ePayment Partner, a link to the Virtual Terminal (gateway), and your OrgID.

Your Payment Partner

C&H Financial Services has sent you an email with your credentials for accessing their virtual terminal.



C&H Financial Services, Inc

Casey Cumming, Payment Processing Consultant
C&H Financial Services, Inc.
Email: JRSalesSupport@chfs.us
Toll-free 855-602-2437, Ext 1

To access your virtual terminal, click the button below:

[VIRTUAL TERMINAL](#)

Your org ID is 533382. You'll need this if you contact C&H Financial Services.

CARDS ACCEPTED

Choose which cards you would like to accept. Check your setup email to see which ones you are authorized to use.

Cards you will accept.

Determine which credit cards you will accept.

Card Types

- Visa
- Mastercard
- Amex
- Discover

Allow 3 credit cards per family/account

Yes 

WEB REGISTRATION SETTINGS

Typically, this is how your new families put their information into your database. After that they use the Parent Portal. You do not HAVE to accept registrations Online to use Total ePay. But if you do, then these are the settings you need to address.

Web Registration Settings

If you will use or already use online web registration **for your new customers**, decide whether your customers will be required to enter a credit card or bank account information.



At least one form of electronic payment is needed. If you are set up for bank account processing, you can give your customer the option of using a credit card or drafting from a bank account.

Credit card required?

Yes 

RECOMMENDED

Bank account required?

No (Hide Field) 

If Credit Card and Bank Account Required:

Only One Required 

PARENT PORTAL SETTINGS

These settings allow your families to update their expiration dates or enter new cards. Families can never delete the only card on file.

Parent Portal Settings (for existing customers)

If you are using or are planning to use the Parent Portal, can customers view and/or update their Credit Card or Bank Account information using the Parent Portal?

 At least one form of electronic payment is needed. If you are set up for bank account processing, you can give your customer the option of using a credit card or drafting from a bank account.

Credit card information?

Can Update

RECOMMENDED

Bank account information?

Hidden

EMAIL NOTIFICATION SETTINGS

SETTINGS

The settings on this page apply to all your ePayment email receipts.

Email Notification Settings

Determine your desired settings for receipts emailed to your customers.

"Reply To" Email Address

info@youremail.com

Include Link To Parent Portal? 

YES

Include Itemized Fees? 

YES

APPROVED TRANSACTION

Be sure to add a subject line that clearly states the purpose of the email receipt. This receipt is automatically sent to the billing contact for all approved ePayment transactions.

Email Receipt: Approved Transactions

Customize your email receipts.

Subject*

Payment Approved!

83 characters left

Message

We have processed a payment to your account.
Thank you!

446 characters left

DECLINED TRANSACTION

It is recommended to set this to **YES**. This will save you time tracking down declined ePayments. Be sure to start the subject line with clear intent. Remember, anyone using a mobile device will only read the first word or two.

Notification: Declined Transactions

Customize the notification in the event of a declined transaction.

Enable this email?

YES

RECOMMENDED

Subject*

Unfortunately, your Payment attempt was unsuccessful

49 characters left

Message

Please login to your Parent Portal, change payment information and resubmit payment

Call the office for any assistance you may need.

369 characters left

VOIDED TRANSACTION

It is recommended to send Voided Transaction notices. It adds a level of transparency that you are letting the family know that a potentially pending charge will not be going through.

Notification: Voided Transactions

Customize the notification in the event of a voided transaction.

Enable this email?

 YES

RECOMMENDED

Subject*

Payment Voided

86 characters left

Message

We have voided a payment on your account. Any pending charges should be dropped within 24 hours.

404 characters left

REFUNDED TRANSACTION

Like voids, this just lets the family know you have processed a refund on their account.

Notification: Refunded Transactions

Customize the notification in the event of a refunded transaction.

Enable this email?

 YES

RECOMMENDED

Subject*

Refund Submitted

84 characters left

Message

We have submitted a refund on your account. Refunds typically take 3-5 days to process.

413 characters left

Tools>Online Web Registration>Agreement Text (Legalese)

Whether you are using Online Web Registration or not, you will always want your families to sign-off on your policies – especially your Payment Policies. If you don't use Web Registration, then have your families sign-off through the Parent Portal. Each time a family signs-off on updated policies, it is recorded and available to view or print on the family's Misc. tab in Jackrabbit.

It's important that your payment policy is the very last agreement text box that will be closest to your parents' eSignature. It should contain EVERYTHING having to do with payments including late payments, refunds, due dates, etc.

The screenshot shows the 'Online Web Registration Settings' page. On the left, there is a sidebar with a 'Text records updated.' message and a list of items: 'Getting Started', 'Settings', 'Field Options/Labels', 'Agreement Text (Legalese)' (which is highlighted in yellow), 'Website Class Listings', and 'Events Calendar/Registration'. The main content area has a title 'Agreement Text (Legalese)' and a sub-instruction: 'This screen allows you to edit the "I Agree" text clauses on the web registration form. You can customize the titles, the text and the display order.' Below this, a note says 'Text Records are shown as "Read Only" - customer can not edit or add responses.' There are buttons for 'Preview Registration Form', 'Refresh', and 'Add Text Record'. A table lists three items: 1. Liability, 2. Dress Code, and 3. Payment Policy. The 'Payment Policy' row is circled in red. A note next to it says: 'Enter your payment policy here. Be sure to include the date or date range that their cards will be charged. This should be the last policy they sign off on.'

Optional Parent Portal Settings

If you want complete control over charging a family's credit card on a designated day of the month, then you do not need to review this section.

If your families want the ability to make their own payments **OR** if you have fees that you allow them to pay over time and then collect the balance on a certain date, then you will want to review this section.

Fees & Payments

Make Payments

Portal Users Can: Only pay balance in full  

Send Payment Alert:

Show Transaction SubType:

Show Session:

Show Payment Method:

Show Check Number:

Show Discounts:

Show Tax

Show Unpaid Amount:

Show Balance:

Portal - Payment Mode

There are four options to select from.

Pay the balance in full

- Parents must always pay the entire balance. This option doesn't allow parents to make partial payments or pick which payments to pay.

Select which fees to pay in full

- Parents can select which fees to pay, however, they must pay the fee in full.

Select which fees to pay (in full or partial amount)

- Parents can change the payment amount and can select which fees to pay.

Change the payment amount (payment is applied to oldest fee)

- Parents can change the payment amount, however, a parent can't select which fees to pay. The payment is always applied to the oldest fee.
- Parents can pay ahead (make a pre-payment) when the family's balance is 0. If the family has a balance, a portion of the payment must be applied to the balance.

Step 4 – Notify your Families of New Policy

If you have not started out with Total ePay, then you want to let your families know this is going to happen and the effective date. Give them some time to adjust and let them do all the work of adding their credit cards into the database through the Parent Portal.

You can accomplish this task by sending a mass email from within Jackrabbit. You should give them a reasonable amount of notice – no less than one month. Two months is ideal and gives them enough time to enter their cards.

Here are some tips for content...

- Let them know you are excited to be implementing a new payment plan that will make life easier for them and free you up to better serve their child.
- Include a link to the Parent Portal and instruct them to add their credit card.
- Provide a deadline.
- If you choose to allow cash & checks, let them know they must still have a card on file and if they pay by the due date, it will not be charged (although we suggest just mentioning this on a case-by-case basis).
- You may also mention this could help minimize future tuition fee increases (because of all the time you will save).

Since your families will be accessing the Parent Portal to add their credit cards, you will also want them to sign off on the new policies. Change the Policies Agreement Date to force a new signature.

Family Information
Policies Agreement Date: <input type="text" value="8/20/2019"/> <input type="button" value="Use Today's or a Past Date"/>
<small>(When a date is entered, then all families which have not agreed to the policies on or after that date will be prompted to re-agree upon logging into the Parent Portal. If a Future Date is used, all parents entering the Portal will be prompted to re-agree to the policies.)</small>

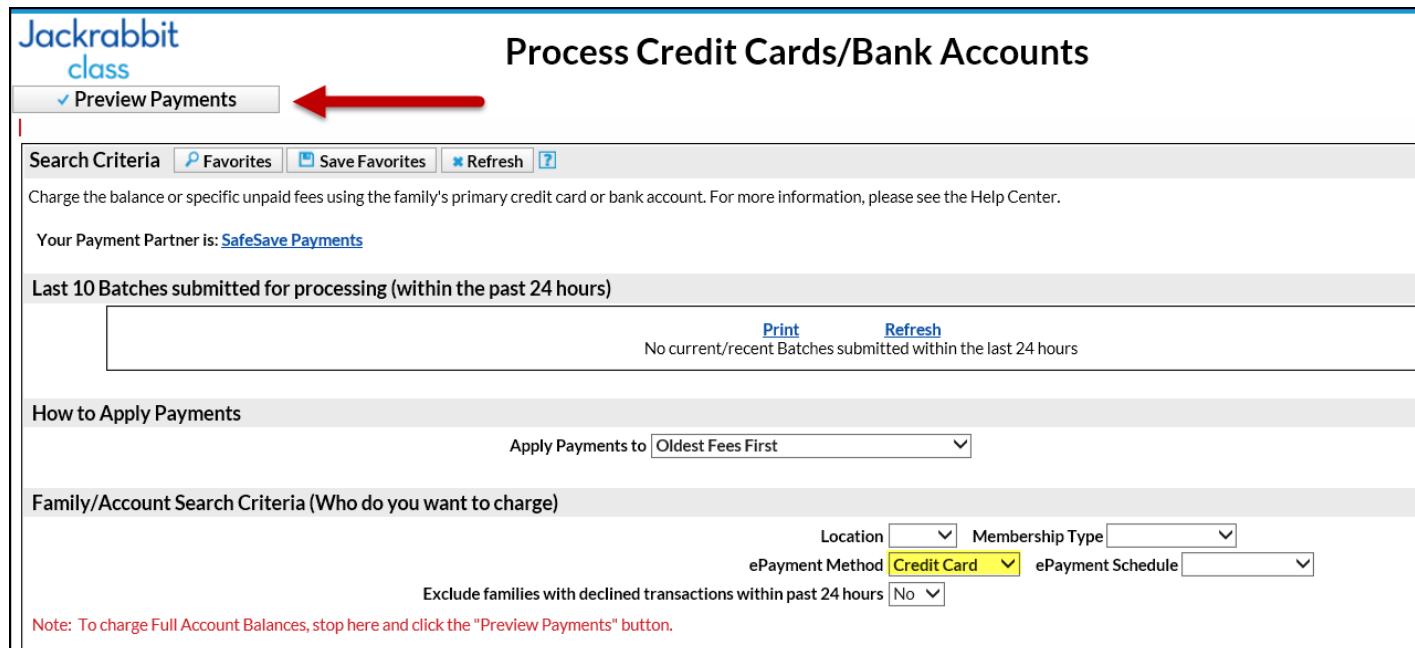
Step 5 – Post Tuition Fees

Post tuition fees to ALL accounts. If you are not using the Post Tuition Fees or Post Tuition by Total Hours process, you will want to contact Support and ask for their assistance in setting that up. It's a HUGE time saver!

Step 6 – The Power of eBatch

Here we go ... this is what you have been waiting for! The Power of eBatch! Let's just assume that all your families pay at the same time each month for their entire balance on their account and you only accept credit cards.

Transactions>Process Credit Cards/Bank Accounts



The screenshot shows the 'Process Credit Cards/Bank Accounts' page. At the top left, there is a 'Preview Payments' button with a checked checkbox. A red arrow points to this button. Below it is a search bar with 'Search Criteria' and icons for 'Favorites', 'Save Favorites', 'Refresh', and a help icon. A message below the search bar says, 'Charge the balance or specific unpaid fees using the family's primary credit card or bank account. For more information, please see the Help Center.' It also mentions 'Your Payment Partner is: SafeSave Payments'. Under 'Last 10 Batches submitted for processing (within the past 24 hours)', there is a table with 'Print' and 'Refresh' buttons, stating 'No current/recent Batches submitted within the last 24 hours'. In the 'How to Apply Payments' section, there is a dropdown menu set to 'Oldest Fees First'. The 'Family/Account Search Criteria (Who do you want to charge)' section includes dropdowns for 'Location', 'Membership Type', 'ePayment Method' (set to 'Credit Card'), 'ePayment Schedule', and a checkbox for 'Exclude families with declined transactions within past 24 hours' (set to 'No'). A note at the bottom says, 'Note: To charge Full Account Balances, stop here and click the "Preview Payments" button.'

What you see above are the defaults. All you have to do is **Preview Payments**.

This will show you how much money will be attempted for processing and how many families. If you like, you can preview the transactions being processed.

Jackrabbit class

Process Credit Cards - Preview Details

User: ECOMMDEMO

Return Process Payments Print

Preview Results

Batch Total: \$ 70.00 Families: 2 Batch #: 587659

Select Process Payments to complete the process.

If successful:

- A Payment will be recorded
- A receipt will be emailed to the Billing Contact.

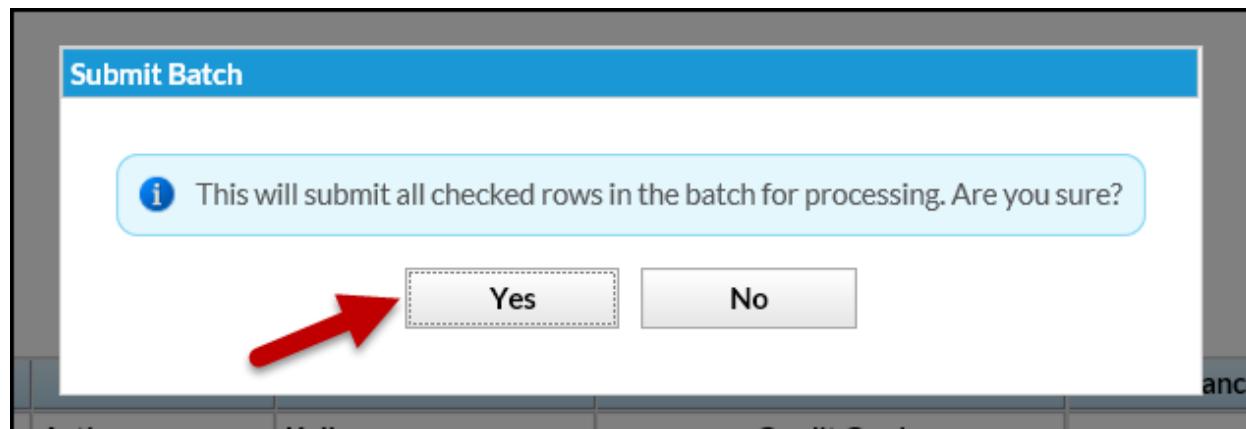
Unpaid Transactions Preview (14507358)

Account	Date	Type	Sub-type	Cat1	Session	Amount	Unpaid Amt.
Davis	11/17/2017	Tuition Fee		Gymnastics	2017-2018	35.00	35.00

Check All Rows Uncheck All Rows

Loc	Family/Account Name	Status	Students	ePmt Method	Balance	Amt to Process	Process?	Preview
main	Davis	Active	Kelly	Credit Card	35.00	35.00	<input checked="" type="checkbox"/>	Preview
main	Finnick	Active	Stan	Credit Card	35.00	35.00	<input checked="" type="checkbox"/>	Preview

Lastly, you will select Process Payments to complete the eBatch. Jackrabbit will ask if you are sure ...



When all cards have been processed, you will see the following screen ...



Credit Card Payments								Close
#	Loc	Family Name	Student(s) Name	Amount Posted	Response Code	Reason Code	Reason Text	TransID#
1	main	Davis	Kelly	35.00	1	100	SUCCESS	3875107172
2	main	Finnick	Stan	35.00	1	100	SUCCESS	3875107208
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This is the only time you will see this screen exactly as displayed. You may want to print it out. If you don't, you can always run a **Transactions>Search** for just ePayments to get the same information with more details including a total amount processed and collected.

Depending on the size of your organization, the entire process of collecting your payments through eBatch will take anywhere from 1-30 minutes on average.

If you also accept ACH/Bank Drafts, you will repeat this entire step and choose **ePayment Method = Bank Account**.

Summary

We are confident you will enjoy the efficiency of the effortless process of Total ePay and so will your parents.

If you have any questions regarding this process, please contact our ePayment Team at ePayments@Jackrabbittech.com.

Printable Checklist

- Contact ePayment Partner
 - C&H Financial
 - SafeSave Payments
- The Plan – prepare your marketing plan for Total ePay
- Settings...
 - Who Can Process Voids and/or Refunds
 - Credit Card & Bank Account Settings
 - Email Notification Settings

Online Web Registration:

- Agreement Text

Parent Portal:

- Optional Parent Portal (fees & payments)

- Notify your families
- Post monthly Tuition Fees
- Process Credit Cards – the Power of eBatch