



Jackrabbit Technologies

Guide to Total ePay

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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 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 integrates 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 and your business. 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

<https://chfs.us/jackrabbit>

Toll-free 855-602-2437, Ext 1

SafeSave Payments

James Mann, Sales Account Manager

Email: jmann@safesavepayments.com

<https://www.safesave-payments.com/JREnroll>

Toll-free 877-938-1221

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/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, and receipts sent automatically.
- 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 or during Online Registration. 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 extremely 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 cards are treated just like credit cards in the US. Visa/MC Debit cards can be used in Canada. Check with your gateway to be sure. The use of debit cards is not available in other 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 the **Gear (icon) > Settings > ePayment 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 the **Gear (icon) > Settings > ePayments**.

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



6

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



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](#)

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

ONLINE 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.

Online Registration Settings

If you will use or already use online 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)

PARENT PORTAL SETTINGS

Controlling how parents can make ePayments in the Parent Portal will be different for everyone. Be sure to go through the entire list. The highlighted settings shown below will determine what type of ePayments you accept, what your payment preferences are, and whether a family can update their payment information from the Parent Portal. Families can never delete the only card on file.

More on payment preferences: If you want complete control over charging a family's credit card on a designated day of the month, set this to **NO**. 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, you will want to set this to **YES** and choose from the options listed. Just click on the ? to see what the options are.

Parent Portal Settings (for existing customers)

If you are using or are planning to use the Parent Portal, please set your electronic payment preferences here.

Accepting Payments & Managing Payment Methods

Which payment method does your business prefer?

☒ I only accept credit/debit card payments
☐ I only accept ACH payments (bank account drafts)
☐ I accept both credit/debit card and ACH payments

Can parents make payments through the Parent Portal?

☒ Yes

When payments can be made in the Parent Portal, parents can:

Select which fees to pay (in full or partial payment) ?

Do you require parents to save a payment method before enrolling in classes?

☒ Yes

How do you want any credit/debit card or bank account information on a parent's account to be managed in the Parent Portal?

CREDIT/DEBIT CARD INFORMATION?

Parent can add & update

BANK ACCOUNT INFORMATION?

Hidden from parent

Would you like to be emailed when a parent makes a payment in the Parent Portal?

☒ Yes

Your choice here is dependent on what services you have with the gateway.

Click the ? to see your options.

RECOMMENDED

PARENT PORTAL SETTINGS – Continued

If you would like to require payment upon checkout, you can set the following Shopping Cart Preferences below. Just click on the ? to view your options.

Shopping Cart Preferences ?

Do you want to require payment upon checkout when parents are enrolling using the Parent Portal?

☒ Yes

Can parents checkout using a payment method not previously saved?

☒ Yes

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

Enter email for notification of ePayment processing completion.

Email Address

info@youremail.com

APPROVED TRANSACTION

Be sure to add a short subject line that clearly states the purpose of the email receipt. Keep in mind, anyone using a mobile device will only read the first word or two. This receipt is automatically sent to the billing contact for all approved ePayment transactions.

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. Be sure to let the family know what they need to do. Do you want them to contact the office, or access their parent portal and update their credit card information?

Email Receipt: Approved Transactions

Customize your email receipts.

Subject *

Payment Approved!

83 characters left

Message

B *I* U

(inherited size)

A



</>

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

Notification: Declined Transactions

Customize the notification in the event of a declined transaction.

Enable this email?

YES

Subject *

Declined Transaction

80 characters left

Message

B *I* U

(inherited size)

A



</>

Please login to your Parent Portal, change payment information and resubmit payment Call the office for any assistance you may need.

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. Let them know the **pending charges will drop in 24-48 hours.**

Notification: Voided Transactions

Customize the notification in the event of a voided transaction.

Enable this email?

YES

Subject*

Voided Payment

86 characters left

Message

B

I

U

(inherited size)

A

🌊

</>

A payment has been voided on your account. **Any pending charges should drop within 24-48 business hours.**

REFUNDED TRANSACTION

Like voids, this just lets the family know you have processed a refund on their account. Let them know it takes **3-5 days to process back to their account.**

Notification: Refunded Transactions

Customize the notification in the event of a refunded transaction.

Enable this email?

YES

Subject*

Refund Submitted

84 characters left

Message

B

I

U

(inherited size)

A

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</>

A refund has been submitted on your account. **Refunds typically take 3-5 business days to process.**

Gear (icon) > Settings > Policies

Whether you are using Online Registration or not, you will always want your families to sign-off on your policies. This is particularly important for your Payment Policies. If you do not use Online 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 Policy tab in Jackrabbit.

It is important that your payment policy contains **EVERYTHING** having to do with payments including late payments, refunds, due dates, etc. Most importantly, you need **permission from the family to charge their payment method on file**.

It’s important to do this step before you notify your families of the change. That way they will be able to sign off on policies at the same time as adding their cards.

Edit Policy: Payment Policies

RETURN

SAVE CHANGES

Payment Policies

Describe this policy...

Font Size

A

B

I

U

Enter everything having to do with your Payment Policies - to include when payments will be drafted, refund policy, cancellation policy, etc. **Need permission from the family to charge their credit/debit card.**

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. ***Families will not be able to add their credit/debit card information until you have implemented ePayments in your database.***

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.

Here are some tips for content...

- Let them know you are excited to be implementing a new ePayment 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 (once ePayments has been turned on).
- 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).

Your families will automatically be required to sign off on your new Payment Policies when they log into the Parent Portal.

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 is 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 ePayments

Process ePayments

PREVIEW ePAYMENTS

Process Setting

Favorites

Save Favorites

Refresh

Process Now

Process Later

Payment Settings

Apply Payments to

Oldest Fees First (within last 12 months)

Your Payment Partner is:

C&H Financial Services

Payment Collection

Collect unpaid fees, but do not exceed the balance on account

Collect full amount of unpaid fees, ignore pre-payments/credits on account

Family Criteria

ePayment Method

Credit Card

ePayment Schedule

Location

Membership Type

Process families with credit balance

Process inactive families

Process families with declined transactions (last 24 hours)

What you see above are the defaults. The preview page will show you how many transactions are being submitted, how much money will be attempted for processing, how many individual fees, and how many families. If you like, you can select “Details” to view the fees for any family ...

Preview ePayments

← RETURN

PROCESS NOW

TRANSACTIONS

6

Total ePayments

TOTAL AMOUNT

1,140.00

Currency

FEES

16

Total Fees

FAMILIES

6

Total Families

RECEIPTS

RECEIPT SETTINGS

Unpaid Fees Preview

CURRENT BALANCE

275.00

PROCESS AMOUNT

275.00

Showing 4 of 4 unpaid fees

DATE	TYPE	SUBTYPE	CAT 1	SESSION	AMOUNT	UNPAID AMOUNT
2022-02-14	Tuition Fee		Music	Fun Session	105.00	105.00
2022-02-14	Tuition Fee		Gymnastics	Fun Session	55.00	55.00
2022-02-14	Tuition Fee		Gymnastics	Fun Session	55.00	55.00
2022-02-14	Tuition Fee		Recreational	Fun Session	60.00	60.00

CLOSE

6 Selected

CLEAR SELECTIONS

<input checked="" type="checkbox"/>	STATUS	FAMILY	STUDENTS	METHOD	BALANCE	PROCESS AMOUNT	LOCATION	DETAILS
<input checked="" type="checkbox"/>	Active	Connor	Mason, Leopold, Bill	Credit Card	275.00	275.00	Main	Details
<input checked="" type="checkbox"/>	Active	Firestone	Patrice	Credit Card	220.00	220.00	Main	Details
<input checked="" type="checkbox"/>	Active	Roberts	Harlan	Credit Card	55.00	55.00	Main	Details
<input checked="" type="checkbox"/>	Active	Russell	Ginger	Credit Card	210.00	210.00	Main	Details
<input checked="" type="checkbox"/>	Active	Skipper	Lily	Credit Card	220.00	220.00	Main	Details
<input checked="" type="checkbox"/>	Active	Stephens	Tabbv	Credit Card	160.00	160.00	Main	Details

◀ 1 ▶

50 items per page

Lastly, you will select **Process Now** to complete the eBatch. Click on the *Process Now Screencast* below to see what this looks like (there is no sound)...

[Process Now Screencast](#)

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

Processed ePayments

COMPLETE

Type
ePayments

Transactions
6

Ran On
Mon, Feb 14, 2022 07:26 PM

TRANSACTIONS
6/6
Successfully Processed

TOTAL PROCESSED AMOUNT
1,140.00/1,140.00
Successfully Processed

FAMILIES
6/6
Successfully Processed

Showing 6 of 6 Transactions [HELP WITH GRIDS](#)

PROCESSED	FAMILY	STUDENTS	METHOD	AMOUNT	RESPONSE CODE	REASON CODE	REASON	ID	LOCATION
Yes	Connor	Mason, Leopold, Bill	Credit Card	275.00	1	100	SUCCESS	6982582011	Main
Yes	Firestone	Patrice	Credit Card	220.00	1	100	SUCCESS	6982582085	Main
Yes	Roberts	Harlan	Credit Card	55.00	1	100	SUCCESS	6982582099	Main
Yes	Russell	Ginger	Credit Card	210.00	1	100	SUCCESS	6982582160	Main
Yes	Skipper	Lily	Credit Card	220.00	1	100	SUCCESS	6982582231	Main
Yes	Stephens	Tabby	Credit Card	160.00	1	100	SUCCESS	6982582269	Main

You can call up this screen any time by going to **Transactions>Recent Transactions>ePayments**. There you will find all ePayments processes you have ever done. It's a great resource!

Depending on the size of your organization, the entire process of collecting your payments through eBatch will take just minutes.

Jackrabbit also offers the ability to schedule your ePayments to **Process Later**. You can have your ePayments automatically run monthly and repeat for however long you need. Be sure to check out the details in our [Help Center](#).

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 the ePayment process, please contact our ePayment Team at ePayments@Jackrabbittech.com or schedule a call or live demo with us. You can find our call calendar [here](#).

Printable Checklist

- ☐ Contact ePayment Partner
 - ☐ C&H Financial
 - ☐ SafeSave Payments
- ☐ The Plan – prepare your marketing plan for Total ePay
- ☐ Settings>ePayments...
 - ☐ Who Can Process Voids and/or Refunds
 - ☐ Credit Card & Bank Account Settings
 - ☐ Email Notification Settings
 - ☐ Policies – Payment Policies
- ☐ Notify your families
- ☐ Post monthly Tuition Fees
- ☐ Process Credit Cards – the Power of eBatch