

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: <u>jmann@safesavepayments.com</u> 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

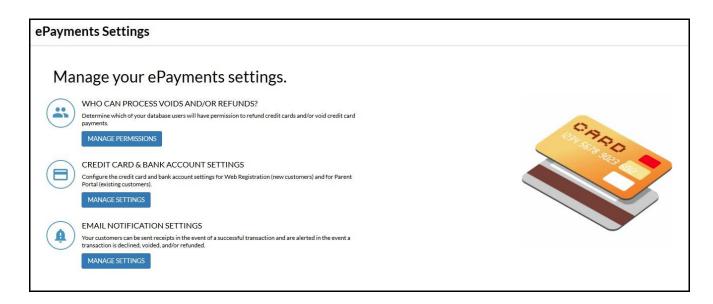
FOR NEW SETUPS ONLY

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.

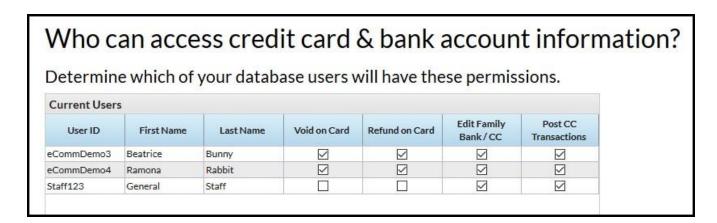
FOR EXISTING SETUPS

You can update your settings by going to the *Gear (icon) > Settings > ePayments*.



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.

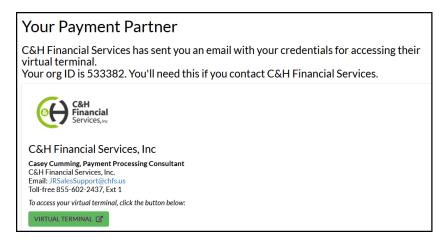


CREDIT CARD & BANK ACCOUNT SETTINGS

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.



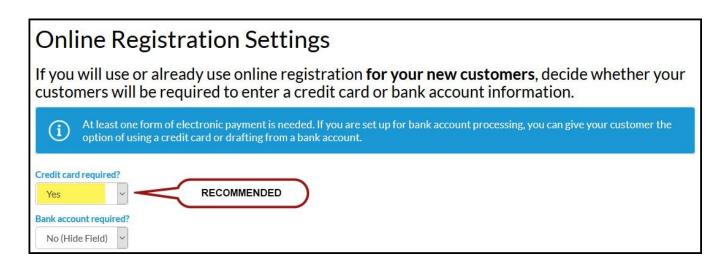
CARDS ACCEPTED

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



ONLINE REGISTRATION SETTINGS

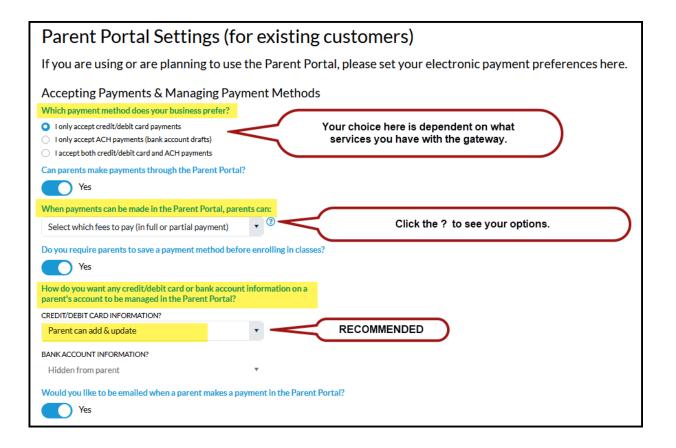
Typically, this is how your new families put their information into your database. After that they use the Parent Portal. You do not HAVE to accept registrations Online to use Total ePay. But if you do, then these are the settings you need to address.



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 – 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?

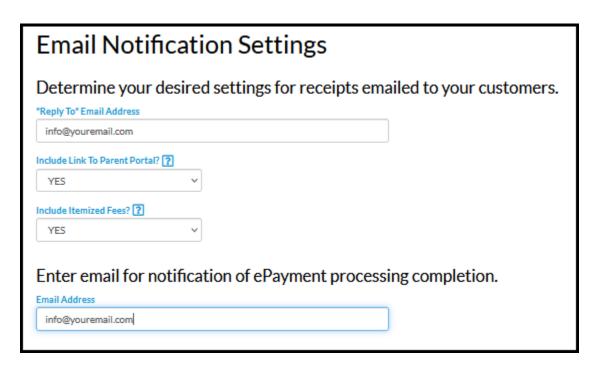


Yes

EMAIL NOTIFICATION SETTINGS

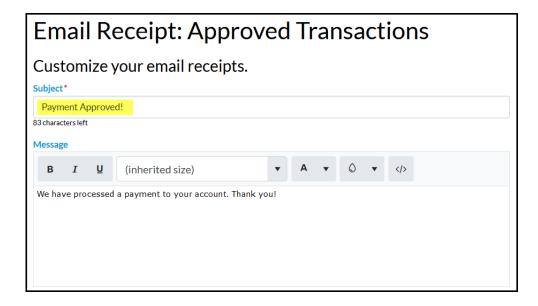
SETTINGS

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



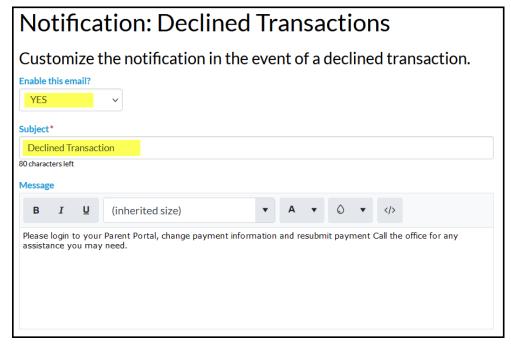
APPROVED TRANSACTION

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

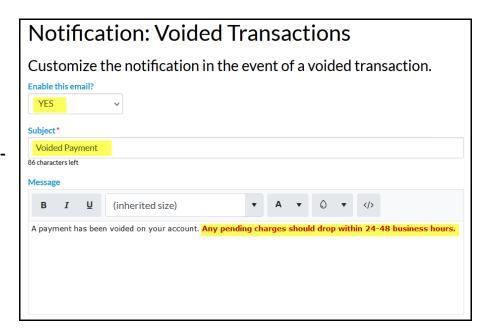
It is recommended to set this to **YES**. This will save you time tracking down declined ePayments. Be sure to start the subject line with clear intent. Be sure to let the family know what they need to do. Do you want them to contact the office, or access their parent portal and update their credit card information?



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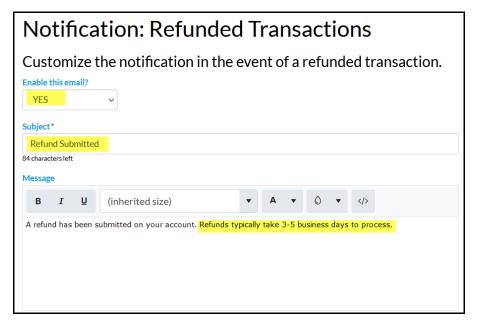
VOIDED TRANSACTION

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.**



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.**

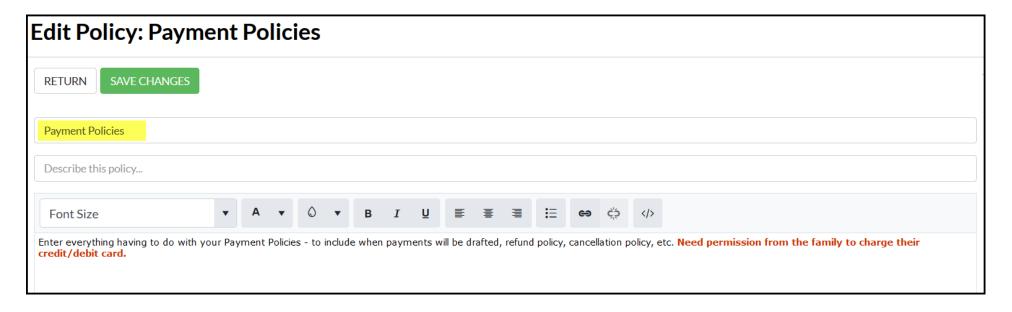


Gear (icon) > Settings > Policies

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.



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.

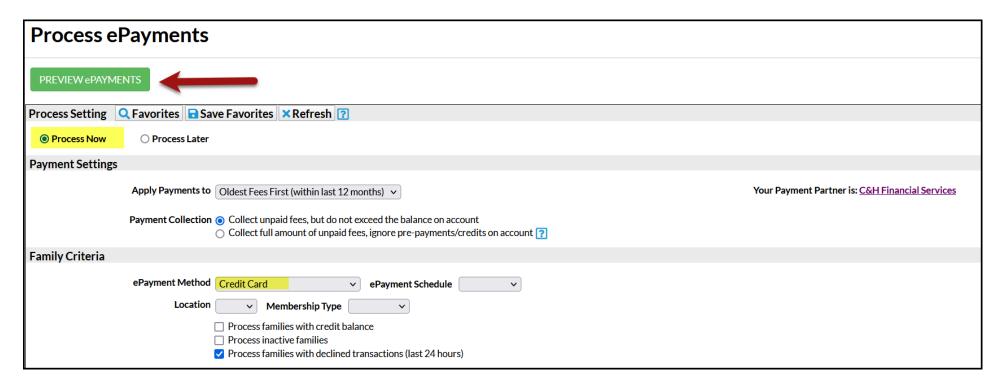
Step 5 – Post Tuition Fees

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!

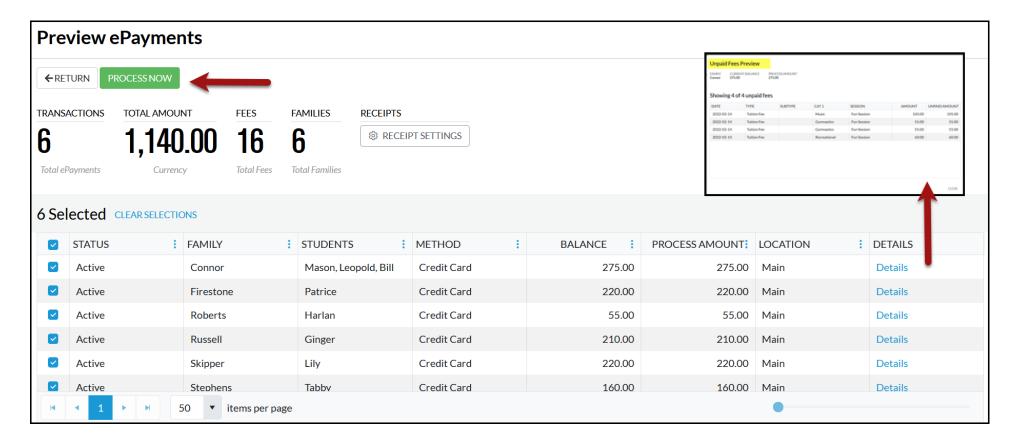
Step 6 – The Power of eBatch

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



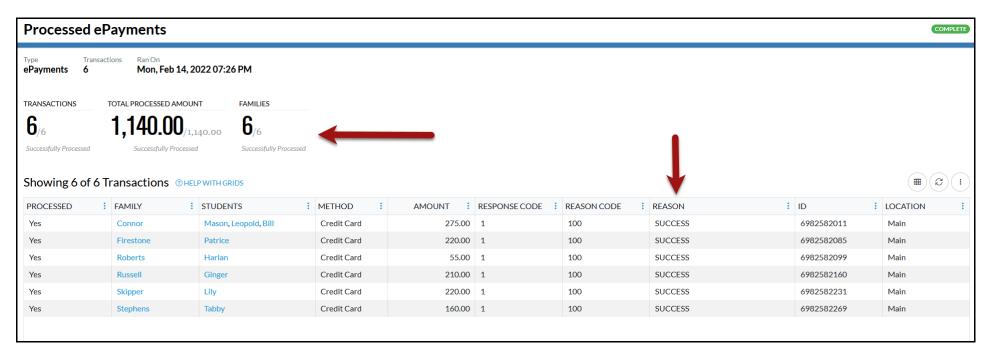
What you see above are the defaults. The preview page will show you how many transactions are being submitted, how much money will be attempted for processing, how many individual fees, and how many families. If you like, you can select "Details" to view the fees for any family ...



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 ...



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 <u>Help Center</u>.

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