





Mass Billing

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Mass Billing provides Owners and Administrators with a way to easily apply payments or one-time fees to multiple families by going to **Finances** (left menu) > **Billing** card > **Mass Billing**. While using Mass Billing:

-  Filter by weekly, bi-weekly, or monthly billing profiles.
-  Apply payments to multiple families.
-  Charge one-time or recurring fees in bulk.
-  See when a payment is declined and the details about the declined payment.




Expand/Collapse All

Report Features

The Mass Billing report reports in real-time. Review the information in the included columns:

- **Account Name** - Click the Account Name to go to the Family Details page.
- **Payer Name** - Click the Payer's name to go to their Details tab.
- **Online Payment Status** - A *Ready* badge indicates the Payer has a payment method saved on file, while an *Action Required* badge indicates no payment method is saved to their account.
- **Billing Profile Name** - Displays the name for a Payer's [Billing Profile](#).
- **Last Payment** - Shows the amount of the last payment made by the Payer and a badge indicating the payment status such as *Completed*, *Processing...*, or *View Declined Payment*.
- **Last Payment Date** - Indicates the date and time of the last payment made on the Payer's account.
- **Balance** - Shows the current balance on the Payer's account.

Use the following features found on the Mass Billing report:

- Click the **Filter** icon  to open a sliding filter panel on the right. Use this panel to filter the data to show only balances greater than \$0 or accounts with a payment method on file.
 - Use the **Column Menu** icon  to sort, filter, add, remove columns, or set the column position.
 - Click the **Refresh** icon  after making a payment to update the data shown.
 - Click **Export To Excel** or **Print** the grid as needed.
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Mass Billing

Filters

PAYMENTS FEES

WEEKLY BI-WEEKLY MONTHLY DECLINED

☐ Select All Export To Excel Print Make Payment

<input type="checkbox"/>	Account Name	Payer Name	Online Payment Status	BillingProfileName	Last Payment	Last Payment Date	Balance
<input type="checkbox"/>	Alman	Tanya Gocheck	Sort Ascending	Weekly Billing Profile	\$300.00	3/26/2025 1:00:13 PM	\$2,200.00
<input type="checkbox"/>	Amin	Dunja Amin	Sort Descending	Weekly Billing Profile	\$0.00		\$3,700.00
<input type="checkbox"/>	Bedi	Zoya Bedi	Columns	Weekly Billing Profile	\$0.00		-\$220.00
<input type="checkbox"/>	Chen	Cara Chen	Filter	Weekly Billing Profile	\$0.00		\$1,200.00
<input type="checkbox"/>	Cho	Aurora Cho	Set column position	Weekly Billing Profile	\$0.00		\$2,100.00
<input type="checkbox"/>	Dennis	Jared Dennis	Ready	Weekly Billing Profile	View Declined Payment \$550.00	8/20/2024 3:23:30 PM	\$4,270.00

Applying Payments to Families

Make Payments

While using Mass Billing, only Payers with a payment method on file may have a payment applied to their account. To apply payments to one or multiple families who have a saved payment method on file, follow these steps:

1. Go to the **Payments** tab, then click either the **Weekly**, **Bi-Weekly**, or **Monthly** tab, based on the Payer's billing profile.
2. Select the families using the checkboxes on the left, or click **Select All** to choose all accounts.
3. Click **Make Payment**.

Mass Billing

Filters

PAYMENTS FEES

WEEKLY BI-WEEKLY MONTHLY DECLINED

☐ Select All Export To Excel Print Make Payment

<input type="checkbox"/>	Account Name	Payer Name	Online Payment Status	BillingProfileName	Last Payment	Last Payment Date	Balance
<input checked="" type="checkbox"/>	Alman	Tanya Gocheck	Ready	Weekly Billing Profile	\$300.00	3/26/2025 1:00:13 PM	\$2,200.00
<input checked="" type="checkbox"/>	Amin	Dunja Amin	Ready	Weekly Billing Profile	\$0.00		\$3,700.00
<input type="checkbox"/>	Bedi	Zoya Bedi	Action Required	Weekly Billing Profile	\$0.00		-\$220.00

4. Select if the payment is the **Full Balance** or a **Custom Amount** for the account(s).
 - If selecting a Custom Amount, enter in the amount.
5. Add a **Description** (optional) and click **Next**.
6. Confirm the payment information is correct and click **Pay with Jackrabbit Pay**.
 - See payment processing details in the *Payments in Progress* window. When payments are complete, the window will change to *Payments Completed* with the number of accounts that payments were applied to and the total amount.
7. Click **Close** to complete this process. If any payment methods were declined, click **Review** to see more details.



An Online Payment Status of **Ready** implies a payment can be made, while **Action Required** means no payment method is on file.

See Declined Payments

To see which payments were declined after processing, look for the View Declined Payment badge in the *Last Payment* column while on the Payments tab for Weekly, Bi-Weekly, or Monthly billing profiles. Click the badge for more information.

Do the following to see a history of all declined payments:

1. Go to the **Payments** tab, then click the **Declined** tab.
2. Review the details in the included columns.
3. Click the **Details** button to see more information about individual declines, such as the reason for the decline.

Mass Billing

Filters

PAYMENTS FEES

WEEKLY BI-WEEKLY MONTHLY **DECLINED**

Account Name	Payer Name	Submitted by	Payment Method	Billing Profile Name	Declined Date	Amount	Current Balance	
Alman	Tanya Gochek	Suzanne Harris	Visa ...0006	Weekly Billing Profile	9/18/2024 10:25:51 AM	\$200.00	\$0.00	Details
Alman	Tanya Gochek	Suzanne Harris	Visa ...0006	Weekly Billing Profile	3/11/2025 12:42:32 PM	\$100.00	\$0.00	Details
Bedi	Abhay Bedi	Suzanne Harris	Visa ...0006	Monthly Billing Profile	3/6/2025 12:36:52 PM	\$50.00	\$50.00	Details




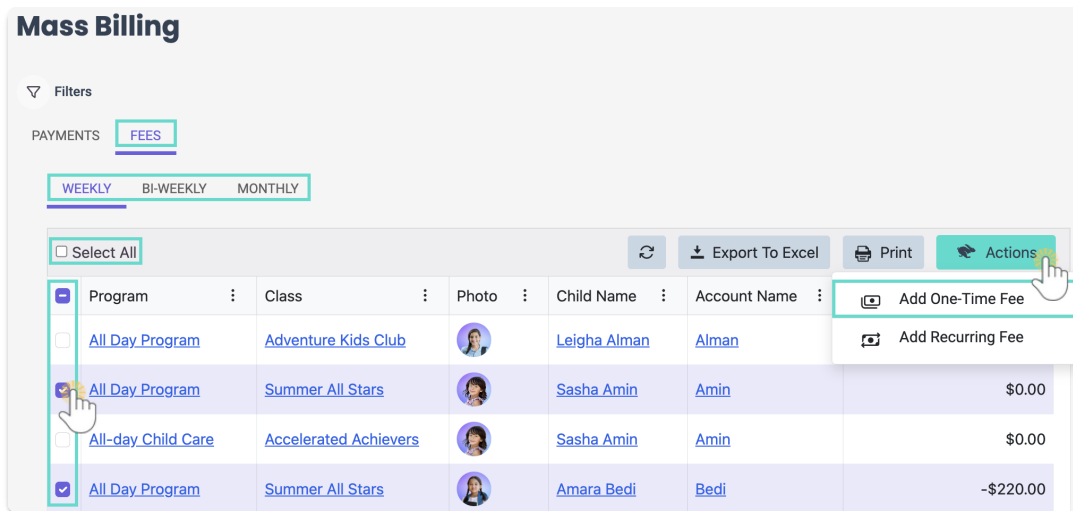
Declined payment information can also be viewed when viewing a **Family's Transactions** in the *Ledger Transactions* section.

Applying Fees to Families

Add One-Time Fees

Add a one-time fee to one or more families by doing the following:

1. Go to the **Fees** tab, then select the families using the checkboxes on the left, or click **Select All** to choose all accounts.
2. Click the **Actions** menu  > **Add One-Time Fee**.

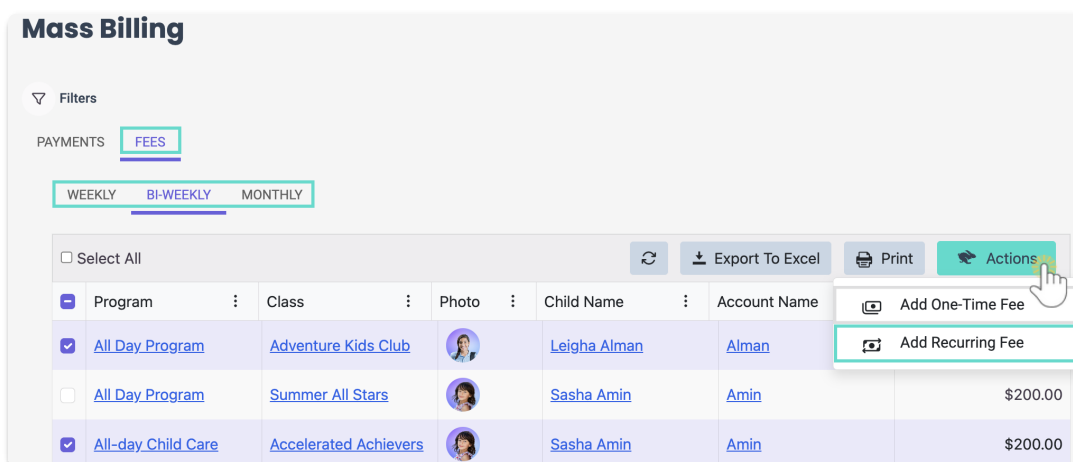


3. Select a **Category** from the drop-down menu or use the **+New Fee Category** button. Then, enter the **One Time Fee Amount**, add an optional **Description** and click **Next**.
4. Use the **Invoice Now** toggle to charge the one-time fee immediately, or select a **Billing date** to apply the fee on a specific date in the future.
5. Use the toggle to apply an optional discount to the one-time fee. Apply the following settings for the discount:
 - Choose the **Category** for the discount from the drop-down menu.
 - Select if the discount is a flat **Amount** or a **Percentage** of the overall fee, then set the discount amount.
 - Add an optional **Description** for the discount.
6. Click **Next**, then review the one-time fee before clicking **Complete Fee**.

Add Recurring Fees

Add a recurring fee to one or more families by doing the following:

1. Go to the **Fees** tab, then select the families using the checkboxes on the left, or click **Select All** to choose all accounts.
2. Click the **Actions** menu **> Add Recurring Fee**



3. Select a **Category** from the drop-down menu or use the **+New Fee Category** button. Then, enter

the **Recurring Fee Amount**, add an optional **Description**, and click **Next**.

4. Select the **Billing start date** and use the toggle to select a **Billing end date** if you would like the fee to end on a specific date in the future, then click **Next**.
 5. Use the toggle to apply an optional discount to the recurring fee. Apply the following settings for the discount:
 - Choose the **Discount Type** from the drop-down menu.
 - Choose the **Category** for the discount from the drop-down menu.
 - Select if the discount is a flat **Amount** or a **Percentage** of the overall fee, then set the discount amount.
 - Add an optional **Description** for the discount.
 6. Click **Next**, then review the recurring fee before clicking **Complete Fee**.
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