

Date: March 19, 2020

Dear Valued Clients,

We are living through difficult and unprecedented times as the world works to prevent the spread of the COVID-19 virus. We know that many educational institutions are quickly transitioning to online classes for students and remote work for Transact Payments administrators, and we want you to know that we are here for you as you make these adjustments.

We'd like to reassure you that Client Support hours have not been impacted by this crisis, and you can expect the same level of support throughout the coming months. In addition, the Product Team has been thinking through ways that our product can assist in your change to remote work, as well as other features that you may want to configure to assist payers during this time.

## Features to help with remote work:

We believe that these features can help you perform your job duties remotely, especially when working with customers over the phone:

- **Customer Research Center (CRC)** enables an operator to pull up a customer's demographic, balance, and enrollment information. Operators can modify certain demographic information, view the customer's balance details and transactions, view and modify the customer's payment plans, view and modify eRefund information, view eBill & 1098-T statements, and more. For more information about this feature, refer to the *System Setup User Guide*, available in the Support Library under System Administration.
- **User Emulation** enables an operator to log into the SAO/ePayment site as a student without needing the student's password. The operator can then assist the student to troubleshoot an issue or make a payment if that permission is set up for the operator. If you elect to turn this on, we will help to configure the correct permissions for your operators. For more information about this feature, refer to the *ePayment & eMarket User Guide*, available in the Support Library under Modules and Services > ePayment and eMarket.

To have either of these features turned on, please have your Cashnet Authorized Contact reach out to Transact Payments Support at [CashnetSupport@Blackboard.com](mailto:CashnetSupport@Blackboard.com) or 1-800-231-9182. During these challenging times, we will **waive our fees** for both of these options **through July 1, 2020**.

## Additional capabilities that may be useful:

These Payments tools—which you can set up free of charge—may also help your Cashnet operators and customers:

- **Authorized Users** allow students to create authorized users, or Parent PINs, so that parents or other authorized payers can log in and pay on behalf of a student through SAO/ePayment.
- **SMS Messaging** provides the option to set up SMS messaging for many different modules. Some examples include messages when an automatic payment or refund has been processed for a customer,

and messages for parents when a payment is made on the account by a student. If you would like more information, please refer to the *System Setup User Guide* and the *ePayment & eMarket User Guide*, or contact Payments Support.

- **Note Codes** can be configured for multiple Payments powered by Cashnet modules to display messages to payers or prevent the use of certain payment methods, such as accounts that have previously been declined. If you are not currently using notes and would like guidance on how to configure them, please refer to the *System Setup User Guide* and the guides for the relevant modules.
- **Report Groups** enable you to create groups of multiple reports that will be automatically generated and delivered to recipients via email. These report groups can reduce your reporting workload and provide useful information to Payments administrators. For more details on how to set this up, refer to the *Reporting User Guide*.

**Support Library**

CASHNet's support documentation can help you to configure modules, manage the CASHNet system, issues, and learn about CASHNet's capabilities.

1. Click to open Support Library page.

2. Click to open Support documents.

Support Library

- Security and PCI Information
- Integration
- Forms
- System Administration
- Release Notes
- Common Application
- Peripheral Equipment
- CASHNet Support
- Modules and Services
- Certificates

A heartfelt thanks

As we receive more feedback and come to understand our clients' needs during this time better, we will provide additional email notifications and potentially training in the features that can assist you.

As always, thank you for your continued partnership as a Payments client.

Sincerely,

Laura McLaughlin

VP, Transact Payments Strategy