

Transact Payments Technical Support Policy





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OVERVIEW

This document describes the specific Support Services provided for the Integrated Payment Solutions product lines. The products included are:

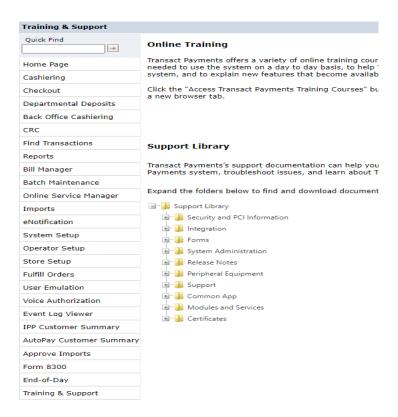
- Tuition Payment Plans
 - o FSPP Full Service Payment Plan
 - o MPP My Payment Plan
- Interface Package / ERP
- ePayment
- eMarket
- eBill
- Cashiering
- Payment Processing Services (SmartPay or Campus Pay)
- Administration

Please refer to the Transact Global Support <u>Policy</u> for general services that extend across all product lines.

TRAINING AND SUPPORT LIBRARY

The Transact Payments Support administration site offers a Training and Support tab to all users. Log into your school-specific admin portal and click the "Training and Support" option on the bottom left side. You will see options to view the online support video library as well as our support library which includes various forms, documentation, and release notes.





UPGRADE REQUESTS

Upgrade requests consist of two main categories: (1) Transact Payments -ERP interface upgrades after you upgrade your ERP, and (2) changes to your networking configurations, including your VPN or firewall rules, protocols and ciphers (e.g., SSL to TLS or RC4 removal), and Shibboleth single sign-on. Advanced planning and scheduling is required for any upgrade requests.

Although upgrade requests can vary significantly, Support will gather information about your configuration and have your Transact Payments trained technical resources perform tasks in your environment. After we collectively discuss the requirements to complete your upgrade request, we will determine a timeline for completion.

The table below provides an overview of the initial steps required for each upgrade type as well as the approximate timeline for completion. If you have any questions, please contact Support.

Table 1: Upgrade Instructions and Timeline

| UPGRADE TYPE | INITIAL UPGRADE INSTRUCTIONS | APPROXIMATE TIMELINE |
|--------------|------------------------------|----------------------|
|--------------|------------------------------|----------------------|



| Transact Payments - ERP Interface | Please fill out the ERP Upgrade Form associated with your ERP, located in the Transact Payments' Support Library > Forms > ERP Upgrades folder and send it to Support. If a form is not available for your ERP, contact Support for instructions. | Minimum 45 days lead time required before go live date |
|--------------------------------------|---|--|
| Networking Configurations/Other | Please contact Support as soon as possible for instructions prior to performing your upgrade and for determining a timeline for completion. | May vary significantly depending on the request. |

SUPPORT OFFERINGS

STANDARD SUPPORT AND PLATINUM+ SUPPORT

Support Schedules for software and hardware contracts have different support service levels. The following are the plans available for Payments Support.

| Integrated Payments Support | Standard | Platinum+ |
|--|----------|-----------|
| Technical Support during normal Client Support hours: 8AM to 8PM EST. Mon-Fri , Not Including Major U.S Holidays. Support can be request during none-business hours at a rate of \$250 hour, with a minimum of 2 hours. | ~ | ✓ |
| 24x7x365 Emergency Outage Support Support for Severity 1 & 2 Emergency Outages only. Response target within 60 minutes for Sev 1 and 4 Hours for Sev 2. Expert Hands Services: \$250 an hour for Non-Emergency Severity 3 &4 Support available upon request. | ~ | ~ |



| Software Upgrades during Client Support hours: | _ | _ |
|---|---|----------|
| North America 6AM to 6PM MST (Phoenix, AZ; no daylight savings) | | |
| Australia & New Zealand 6AM to 5PM AEST | | |
| International: 6AM to 6PM US-MST (UTC -7:00) | | |
| Yearly included Train Database Refresh | | |
| For Troubleshooting and Support purposes only, Test servers will receive | | |
| the same levels of service as production servers. However, problems found | | |
| on any test system will not exceed a Severity of 3 without reasonable verification that the same problem is occurring on the production server. | | |
| Test server support includes periodic database refresh from Production to | | |
| Test upon request. Test server builds are not covered and require a | | |
| separate engagement through Consulting Services. | | |
| Platinum+ Clients are allowed up to 2 additional refreshes yearly with no | | |
| additional charge. | | |
| Direct access to the Online Customer Learning Center | | |
| The Online Customer Learning Center is an online portal providing 24hr | | |
| access to over 80 online step-by-step instructional videos and live chat* | | |
| support providing further training on administrating, maintaining, and managing the Transact System. Transact will provide Customer up to three | | |
| (3) user logins to the Online Customer Learning Center. | | |
| Assigned a Senior Dedicated Support Engineer | | |
| Dedicated phone number for direct routing to their assigned Engineer. | | ~ |
| | | |
| | | |
| | | |
| Quarterly Support Check-In and Review | | |
| Trending Analysis based on Institutions needs and prioritization for a | | / |
| proactive approach. | | • |
| Request for this review must be made in advance by primary contact. | | |
| Support Appointment Scheduling | | |
| Ability to schedule times that work best for the client with Support. | | |
| | | |
| Remote Software Restoration | | |
| In the event of host hardware failure, Transact will remotely: | | |
| Assist with the installation of application and operating system from | | |
| backup media. Confirm interfaces are on-line and processing transactions. | | |
| | | |
| | | |
| Expert Hands and Maintenance Support | | |
| 5 hours of product training or expert hands services will be provided | | |
| quarterly, to be used at the client's discretion upon request. Will not be | | |
| available during peak times and hours to not roll over. | | |

Please consult your CSM if you have any questions regarding additional Support offerings.

FULL SERVICE PAYMENT PLAN (FSPP)



The Full Service Payment Plan (FSPP) module includes the creation and maintenance of payment plans. These plans should be submitted via a Support ticket with a filled out Full Service Payment Plan Request Form, which is available in the Transact Payments Support Library through the Training & Support.

Additionally, Transact offers payer-facing support for payment issues. Students or parents can reach our Student Services team at:

Phone: 888-381-8054, option 1, option 2

Email: SmartPaySupport@transactcampus.com

Our team will always attempt to assist the payer but may need to redirect them to the institution student accounts office or check with the school for permissions to adjust the student account. Authorized contacts should ensure their FSPP Preferences are filled out. They can view and edit these preferences via the Transact Connect <u>Portal</u> under Library > FSPP. Keeping this up to date will allow us to expedite service requests from students and parents.

Examples of issues we can assist with based on the FSPP preferences sheet:

- Expiring note codes blocking payment/enrollment
- Withdrawing students from installment plans upon their request
- Adjusting installment plan budget amounts
- General assistance with making a payment

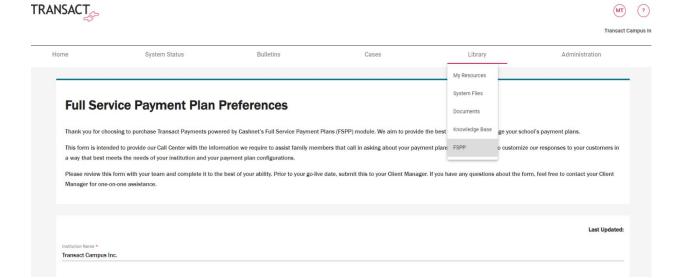
Examples of issues requiring the school to address:

- Questions regarding why an imported balance does or does not include some charges
- Requests to refund transactions Explanation of account charges or fees
- Assistance logging into the institution student/parent portal

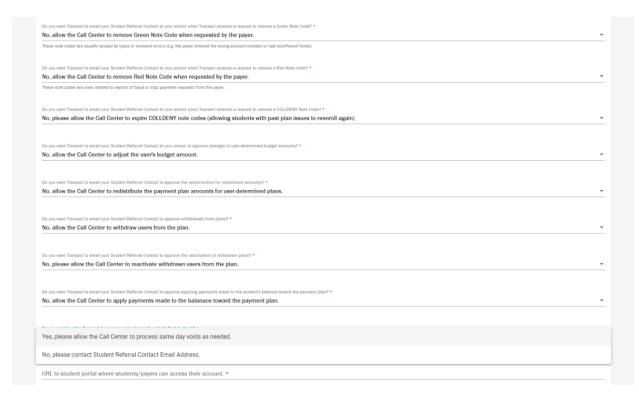
STEPS TO UPDATE YOUR FULL SERVICE PAYMENT PLAN PREFERENCES

- 1. Login to the connect portal: https://connect.transactcampus.com
 - a. Choose 'Library' and 'FSPP'





2. Choose your FSPP preferences:



You can login to make changes to your preferences at any time and will be reflected immediately for the Transact Support team to review.

PCI COMPLIANCE



Transact operates in compliance with the Payment Card Industry Data Security Standard (PCI-DSS), and adopts the highest levels of releases when they become available from the PCI Security Standards Council. Transact is certified as a Level 1 Service Provider under both VISA Cardholder Information Security Program (CISP) and MasterCard Site Data Protection (SDP). Evidence of this compliance may be verified by visiting the Visa or MasterCard website or by contacting your Client Success Manager.

SYSTEM AVAILABILITY

Transact will use its best efforts to maintain 99.9% Availability of the Service. "99.9% Availability" means that the Service will be unavailable no more than 43 minutes (> .10%) in any calendar month, as determined by Transact and excluding any period of unavailability described in the section entitled, Exception, below). The Service is deemed unavailable when Transact's automated monitoring system is unable to access the web or database servers of the Service.

Exceptions: Transact's service level commitment does not cover any unavailability attributable to: (1) customer's use of the Service otherwise than in accordance with the Documentation or with user manuals from time to time made available to Customer; (2) any data entered into the Service by customer; (3) any event beyond the reasonable control of Transact, including the malfunction or unavailability of any public Internet backbone or network or of any server or other equipment outside of Transact's facility, or any failure of customer's equipment or local access service, or (4) scheduled maintenance pursuant to Scheduled Maintenance Windows section below.

SCHEDULED MAINTENANCE WINDOWS

Periodically it is necessary for Transact to perform maintenance activities on customer environments. Scheduled maintenance windows occur every Sunday between 1:00 AM and 6:00 AM Eastern Time. The Transact Payments environment is fully redundant therefore, most activities can be performed on one server at a time and do not result in any disruption to users. During this time, capacity and redundancy may be reduced, but the site continues to operate normally from the perspective of end users. Batch jobs are never scheduled during the maintenance window and clients are advised not to schedule batch file transfers during this period.

If Transact anticipates that scheduled maintenance will have an impact on end users, we will inform Transact Payments Administrators by email. Except in the case of an emergency, notification will take place at least 24 hours in advance. Whenever possible, such maintenance is planned for Sunday mornings, which are normally the lightest usage period for the environment.

In extremely rare cases, maintenance activities may extend beyond the normal window. This happens when necessary activities will take longer than three (3) hours and cannot reasonably be broken into smaller steps. Should this be necessary, the maintenance will be scheduled for weekends or holidays and Transact Payments Administrators will be notified at least 72 hours in advance.

RELEASES AND REFRESHES



New versions of Transact Payments are released approximately four (4) times per year. Releases typically contain a combination of new features, enhancements to existing modules, and bug fixes.

Support coordinates with clients to upgrade Train environments and distribute release notes. Once Train environments have been upgraded and clients have had reasonable time to test, Production environments are upgraded. To minimize disruptions, all upgrades are scheduled in advance and take place outside regular business hours.

Transact Payments is a hosted solution therefore, we are not able to leave older versions of the software in place for extended periods of time. Clients who desire to test new releases should do so promptly when the new release becomes available. If you foresee a conflict with a scheduled upgrade date, please promptly contact Support so that accommodations can be made.

When minor bugs are discovered in a release, Transact will create a refresh to address the problem. Refreshes are minor updates to the code which can be applied without any downtime or changes to client configurations. These are done on an as-needed basis and do not require advance planning by clients.

TRAIN ENVIRONMENTS

In addition to a Production environment, each Transact client receives access to a Train environment that can be used for training new staff, testing new procedures and interfaces, and other purposes. When a new release of Integrated Payments becomes available, the client's Train environment will be upgraded prior to the production environment.

The Train environment is created by making a full copy (sometimes called a "clone") of the production environment. This is done approximately one (1) week after the client goes live. The Train environment is accessed using a separate URL.

At the client's request, the data in the Train environment will be refreshed by making another full copy of the production environment once every 12 months. More frequent refreshes are available for an additional charge, as are additional Train environments.

NETWORKING INFORMATION

For networking information, such as email IP addresses you must white-list, refer to the Payments Technical Reference Guide, available in the Support Library through the Training & Support.



When support, replacement or repair becomes necessary, the first step is to find out if the device is supported, and then determine if it is under warranty. Devices Supported will be made available in product release notes and/or the Peripherals Buyer's Guide.

In the event the hardware is out of warranty with the manufacturer, Transact will test to ensure the software is functioning as designed. If it is determined by Transact Engineers that the device is still not functioning properly and a reasonable workaround is not available, it will be the client's responsibility to have the device replaced. Please consult with your Client Success Manager for device replacement.