# 2023.4 Release Notes

At Transact, we continue to empower our users by enhancing the Transact Integrated Payments product through regular software releases.

These Release Notes describe the enhancements, new features, and issues resolved in the 2023.4 release.

## Contents

## Enhancements

Below is the list of enhancements in this release.

### Paper Check Refunds (BETA Program)

We have added a Refund Paper Check add-on module to fill the gap when a student does not enroll to receive a direct deposit. Additionally, this is helpful for students who are unbanked. This add-on will assist with disbursing credits to students in a timely manner to meet Title IV requirements. Transact will collect the refund information in the same file used to submit eRefund direct deposit payments.

**Note:** If you opt to utilize this new feature, please contact your Account Manager to learn more about the product and associated subscription fees.

## Google Pay for eMarket Checkout and ePayment

Google Pay, which was initially available in eMarket Storefronts, has now been expanded to include eMarket Checkout and ePayment options.

**Note:** Google Pay and Apple Pay are currently unavailable for SmartPay schools due to card scheme rules regarding service fees.
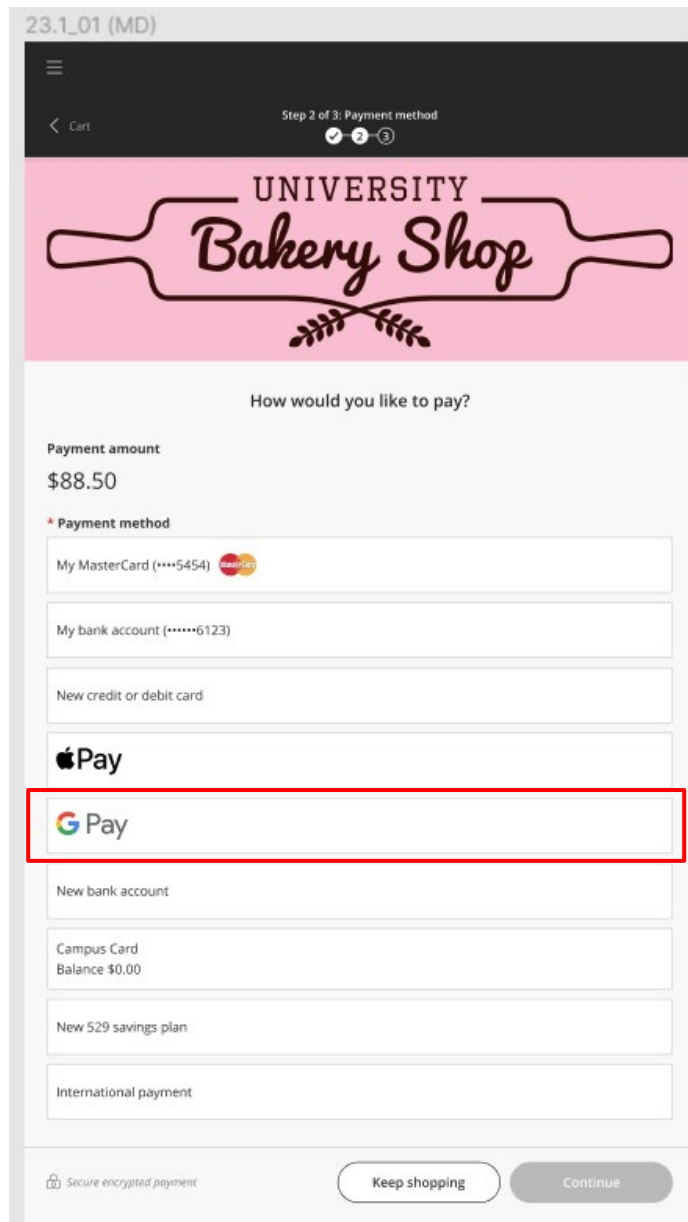


**Figure 1 Google Payment Option**

# Transact Auth Single Sign-On (SSO) support for Parent ID and Alternate ID

## Parent ID

SSO via Transact Auth now supports Parent users in cases where the Parent Portal is managed outside of Transact. Configuring a real-time parent lookup is necessary; please contact your Account Manager for details.

## Student Alternate ID

SSO via Transact Auth now supports student SSO in scenarios where the school identity provider does not have the primary ID of the student in Transact. This feature is only available in ePayment.

**Note:**   Configuring a batch demographic import is necessary.

A dropdown control has been added to the Merchant Setup, located next to the fields for Identity Provider. This dropdown allows Admin users (IDC Operator or School Operator who have access to Merchants Setup) indicate whether the ID received from the IDP is an 'Alternate ID' of the student.
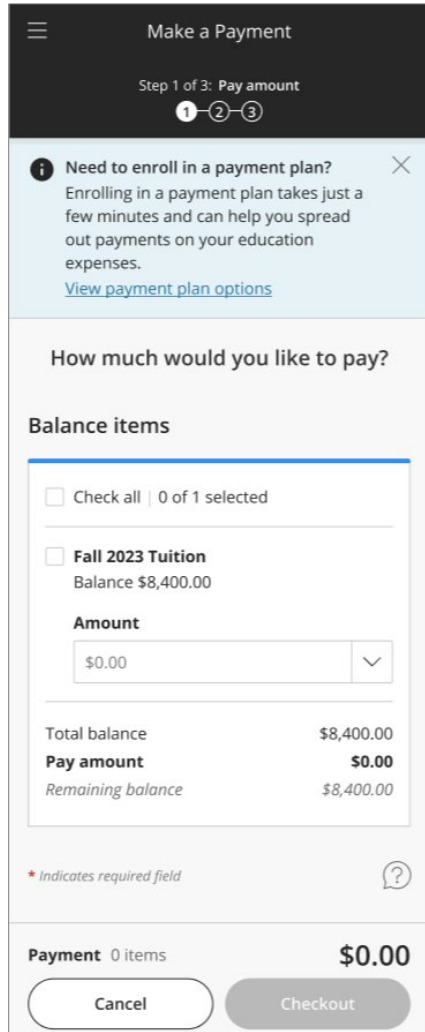


**Figure 2 Identity Type Selection**

# ePayment: Payment Plan offer in payment flow

Users now have the capability to enroll in a Payment Plan directly within the 'Make a Payment' workflow. By clicking on the 'View payment plan options' link, users will be redirected to the View Installment Payment Plan Options for Enrollment page for sign-up.



**Figure 3 Payment Plan Enrollment Option**

# eBill Usage View and Notifications

eBill has been enhanced to allow the user to view eBills count for the current year using Bill Manager. Email notifications will be triggered for the school when usage reaches 50%, 75%, 90%, and 100% for the year. This enhancement has been implemented to optimize database efficiency.

The eBill count includes all bill types including published and unpublished bills.



**Figure 4 eBill Usage**

# Payment Plan Restrictions by Customer Group

Admin Users can now restrict Payment Plan enrollment to specific Customer Groups.

**Note:** This feature does not change the Note Code functionality.



**Figure 5 Enrollment Restriction Options**

# Minor Enhancements

Below is the list of minor enhancements in this release.

| CATEGORY | DESCRIPTION |
|---|---|
| Admin Portal | School operators with 'View and Modify all Notes' permissions can now modify note code properties, even when the note code is set up as a 'Transact Campus Payments Note Code.' For example, they can expire a COLLDENY note code. This eliminates the need to reach out to Transact Support for assistance. |
| Checkout | The Help and 'Uh-oh!' error messages have been updated to include the support link rather than the phone number, ensuring clarity on how to contact Transact Support. |
| ePayment | The Print Bank Transfer Instructions now features the client's logo, and the background color is displayed in the Transact IFT printed instructions, adding a personalized touch to the instructions for your institution. |
| ePayment | We have included explanatory text for the APR (Annual Percentage Rate) and Finance Charge to ensure that users can easily comprehend the purpose and nature of the fees they are being charged. This information becomes visible when users hover their cursor over the information icons. |
| eRefund | When the Prenote method is set to 'Enforce Prenotes', the system will now permit eRefund processing for customers who enrolled before Prenotes were required. |
| Virtual Terminal | Users with an expired password are now allowed to change their password directly after login, eliminating the need to log into Admin Legacy to perform this action. |
| Virtual Terminal | A prompt now appears to users, notifying them to choose a different device when their previously selected device is no longer available, enabling them to continue with their operations. |
| Virtual Terminal | Virtual Terminal Users can now filter Merchant Codes and Virtual Terminal Devices. When a Merchant has its "Allowed Virtual Terminal Devices" option set to "Only devices selected below" and there are specific entries listed under "Selected Devices," the results will exclusively include the devices in the list. When a Virtual Terminal Device has its "Allowed Merchant Codes" option configured as "Only merchant codes selected below," and there are specific entries listed under "Selected Devices," the result will include only the Virtual Terminal Device associated with the defined Merchants in question. |

# Resolved Issues

Below is the list of Resolved Issues in this release.

| ISSUE TYPE | DESCRIPTION |
|---|---|
| Admin Portal | Cashiering – The message for credit card processing failures displayed 'Host Error (Approved),' which was confusing and lacked informative detail. The error message now displays specific AVS failures such as 'INVALID ADDRESS.' |
| Admin Portal | An error occurred in Online Lookup when special characters ('}') were included in the HTTP Basic Authentication credentials. These special characters are now supported. |
| Admin Portal | Reports - When selecting the date filter for 'Last 7 days,' the current date was included in the generated date range. |
| Admin Portal | Credit Card Type not being populated when refunding an EMV transaction in the Cashiering module. This was impacting both Banking reports and subsequently leading to problems with client disbursements. When refunding an EMV transaction in Cashiering, the system is now populating Credit Card Type. Expiration Date will no longer be populated. |
| Admin Portal | Reports - The Parent PIN Detail Report was timing out for schools with less than 5000 records. The processing speed of the Parent PIN Detail Report has been enhanced. |
| Admin Portal | Cashiering – The store tax amount values were previously saved as a separate line item in the 'paiditems' table but were not populating in the Transactions and Payments table. These tax amount values are now added to both the Payments and Transaction tables in the database. |
| Checkout | A parity issue during checkout was appending Site_Name rather than Merchant_Code. The checkout process now appends Merchant_Code and not Site_Name to match Legacy. |
| ePayment/Payment Plan | The 'Remaining Amount Due' on the receipt popup page is inaccurate when a payment is applied to both an Imported Payment Plan with 'Adjust Imported Balances' and an Open Item. When paying on an installment payment plan and open item, the Receipt/Confirmation page now shows a remaining balance amount that matches the Remaining Balance. |
| ePayment | When the school summarized balances by term, and the same customer accesses the same site link multiple times simultaneously, duplicate balance records were created. Multiple Single Sign-On (SSO) requests for a single customer are no longer triggered, and balance records are not duplicated. |
| ePayment | When clicking the 'account nickname' tooltip on the Payment Method page, the page was automatically advancing to the next page, either the service charge or review page. You are no longer advanced to the next screen until you select 'Continue' on the Payment Method step. |
| ePayment | The Payment Plan agreement page was previously displaying the incorrect page title. It now correctly displays 'Auto Pay' as intended. |
| ePayment | GradGuard - The policy number is not being displayed correctly after enrolling in tuition insurance. The tuition insurance policy number is now correctly displayed. |

# Contacting Transact Support

Feel free to contact Transact Support with questions about the release or for technical assistance with the Transact Integrated Payments application.

You can contact Transact Support through following methods:

1.   [Transact Support Hub](#) or

2.   [Transact Connect](#)

You can open a case online 24/7, and if you do so outside our regular hours of operation, we will respond on the next business day.