BUSINESS INTELLIGENCE GROUP'S
EXCELLENCE IN
CUSTOMER
SERVICE
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2020
EDUCATION

PaySchools
Customer
Support Guide

2020

PaySchools
An i3 Verticals Brand

WELCOME TO PAYSCHOOLS AND THE PAYSCHOOLS CUSTOMER SUPPORT GUIDE.

Whether you're a new customer or a longtime colleague and friend, I want to take this opportunity to thank you for your trust in PaySchools. My team and I work hard to earn that trust every single day.

PaySchools is a **leading K-12 payment software company**, but we know that you have a choice. That's why we decided long ago to be a **cutting-edge technology company that valued old-fashioned people skills**. We promise that our customer service is the best in the business.

RICK KILLIAN
VP of Operations
PaySchools

Did you know that most of our competitors charge extra for training and customer service? PaySchools does not, no matter how much time or retraining you need. For our customers, that often adds up to significant savings.

What's more, my support team members—with a combined 152 years of PaySchools experience—**treat customers like neighbors**. First, you'll get a live, courteous support person in our US-based service office every time you call in during business hours. If you choose to email us during business hours instead, we'll get back to you within 30 minutes. And second, our goal is to be truly helpful and thorough the first time you reach out. We aim to fully resolve 90 percent of problems during that initial contact.

We've put together this guide as a reference to familiarize PaySchools customers with our support processes and people. But if you ever have a question not answered here, please call or email our support centers. You'll find our contact information on page 17.

THE PAYSCHOOLS SERVICE PROMISE

At PaySchools, excellent customer service is just as important as excellent technology.

We promise to provide **complimentary product customization**, **training**, and **support**.

We promise to answer calls in person during business hours.

We promise to return emails in a timely manner during business hours.

We promise to be **courteous** and **professional**.

We promise to **solve problems thoroughly**, in a single contact if possible and until you are satisfied with the resolution.

New Customers: Getting Started

After you're done working with your PaySchools sales representative to finalize your district's purchase order for PaySchools software and products, **the PaySchools support team gets to work**.

It's our job to take you through **customization, installation**, **training**, and **implementation** as well as provide **routine ongoing support**.

Here are the steps you'll see unfold in the days to come:

1

You'll receive an email from our Implementation Manager

Our Implementation Manager, Chelsea Brown, will email the **district contact person** you've provided to introduce herself and get the ball rolling. She'll also send an important Installation Information form. Chelsea will be your main contact through Step 4 and will stay in touch throughout the process.

CHELSEA BROWN
Implementation Manager

PaySchooler since 2014

Chelsea's customer-service background includes serving, retail, and internet sales at a car dealership. She believes in treating customers with the same level of care that she would expect to be given. Her customer-service superpower: Honesty. High-energy Chelsea has run the Pro Football Hall of Fame half-marathon for a number of years.

2

You'll complete and return the Installation Information form.

On this form, you'll provide **contact information** for the district staff members who may be involved in set-up and installation (such as business office, nutrition services, IT) of the PaySchools products.

IMPORTANT: Please designate one person as your district's project leader for the PaySchools installation, training, and implementation process from here forward. This is an administrative, not technical, role. Your project leader will be our main point of contact and will help coordinate the participation of other district staff members and help track down answers to our questions as needed.

3

You'll sign and return the PaySchools Terms and Conditions Agreement.

This is the type of legal document you'd review and sign in working with any software or financial vendor.

4

Your team will have a phone meeting with the PaySchools Implementation Manager as well your PaySchools Installer.

Chelsea will arrange this meeting. **It's the planning meeting for your team as well as ours, so it's helpful if everyone who will be involved can be there!** While PaySchools will handle as many of the upcoming tasks as we can, software (and hardware) integration is always a collaborative process between the customer and vendor.

From here forward, your PaySchools Installer will be your main PaySchools contact.

5

Your PaySchools Installer will gather data and complete customization.

Behind the scenes, your Installer will now be working to pull together all the parts and pieces to **customize** your PaySchools software, **prep technology integration**, and **prepare for a smooth installation**.

If your purchase order also includes cafeteria point-of-sale hardware, our PaySchools hardware specialist will also be in touch.

6

Your PaySchools Installer will install the software.

Because our software is cloud-based, installation will take place remotely. We'll let you know when it's ready to preview.

If you are having hardware installed, our hardware specialist will pre-install PaySchools Admin and Lunch. All you need to do is unbox and power on. If your order also includes on-site hardware installation, our hardware specialist will take care of all the set-up at your locations.

7

Your team will receive training.

The Implementation Manager will reach out to you to schedule training. The training session(s) will usually take place either right before or right after the software goes live, depending on which software modules you are using. Trainings are often conducted via live, custom webinar. Your team will gather at a computer or computers, and using a tool such as GoToMeeting, your Installer will Screen Share with you to give you a tour of the software, demonstrate how to carry out essential tasks, and answer all of your questions.

We also offer refresher webinars at the beginning and end of the school year as well as concise training videos on specific tasks. **And we provide complimentary ad-hoc training as needed to new staff members. If your team ever needs additional training, just ask!**

8
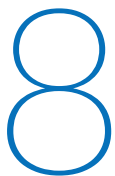
Your PaySchools software will go live.

Once your installation is complete and your team has been trained, **your PaySchools software will be up and running**! Whenever you have questions or encounter issues, please reach out to our live support teams. You'll find our contact details on page 17. We want you to feel comfortable calling or emailing us any time.

PAYSCHOOLS PRIVACY AND SECURITY

The privacy and security of your school community's personal and financial data are of the utmost importance to us.

> Our software uses personal information provided by families to complete requested payments and record and share purchase-related information with designated district staff. It is fully compliant with the Family Educational Rights and Privacy Act (FERPA), which protects student information. Our software also protects all parent information. **We do not share, rent, or sell customer information to other companies.**

In addition, all PaySchools software uses the **latest security protocols to safeguard financial and personal data**. Our software is built on a payment engine that securely processes more than $13 billion dollars annually.

SEND US YOUR WISH LIST!

The PaySchools support team also fields product feedback. If you have ideas about how we could improve our software, please send them to us! We love hearing what you think, and we pass all your thoughts and ideas along to our product enhancement teams.

Email your feedback to Rick Killian, our VP of Operations: **Rick.Killian@payschools.com**

Ongoing Support

The PaySchools support team is standing by to help you with anything you need. You'll find our contact information on page 17.

When you call our support centers, your call will be placed in a queue and answered in the order in which it was received. The system will tell you the expected wait time. We are typically able to get to your call within a minute or two, though at the beginning of the school year the wait times can be a little longer.

Our call system now also offers a **call-back option**. If you would rather be called back than placed on hold, simply make that choice in the call system.

You are also welcome to email us with your support questions! During business hours, we try to respond within 30 minutes to all customer emails.

All support requests, whether on the phone or via email, receive a ticket number. We will send you a follow-up email with the ticket number in case you need to reference a previous conversation. What's more, we do not close out support tickets until you tell us you are completely satisfied with the resolution.

KEY ACCOUNT MANAGERS

Large school districts with particularly complex needs are also assigned a designated PaySchools representative called a Key Account Manager. This is the main support person you will get to know and can reach out to at any time.

And don't forget that we offer complimentary ongoing training. If your team needs a refresher, if you're having trouble with a certain task, or if you have new staff members that need to be trained, we're happy to schedule a custom training session. We also offer refresher webinars at the beginning and end of the school year as well as concise training videos on specific tasks. To access our training video library, please visit **www.payschools.com/training**.

Finally, our support team is available to help you with **product customization**.

If you need a custom report in PaySchools Admin, for example, or would like help setting up custom layouts and items on your PaySchools Lunch screens, we've got you covered. Just call and ask! This service is complimentary and is just one of the ways that we demonstrate going above and beyond.

PAYSCHOOLS SUPPORT: BY THE NUMBERS

At PaySchools, we value our customers. Taking good care of our customers is how we prove this.

Each month, we answer:

1,371
SCHOOL-DISTRICT CALLS

2,758
PARENT CALLS

We return

2,722
emails each month.

In 2019, we completed

167
days of on-site customer support and resolved

32,671
support tickets.

96%
of PaySchools customers return year after year.

Together with its parent company, i3 Verticals, PaySchools processes more than

$13 BILLION
in payments each year.

In 2019, PaySchools gave back more than **$50,000** to the districts we serve through our philanthropic programs on initiatives such as school lunch debt, school safety, and more. In 2020, we teamed up with HundredX® and earmarked up to **$1,000,000** through our Trays Across America program.

THE PAYSCHOOLS SUPPORT TEAM

BRYAN ABRAHAM | Application Development Specialist

PaySchooler since 2015

With support experience in several industries, Brian has learned that if you pay close attention to what the customer says they want, you'll hear what they need. Brian's customer-service superpower: "Details. Lots. Of. Details." In 2001, Brian got to hold the Stanley Cup.

COREY BANGS | Product Specialist

PaySchooler since 2017

Pre-PaySchools, Corey was a ski instructor and dive coach. She believes that good customer support should blow the customer's expectations out of the water. Corey has two plates and nine screws in her ankle, so she claims to be 10 percent cyborg.

CHRIS BONSKY | Support Specialist

PaySchooler since 2019

"Teamwork is what makes the dream work," says Chris, who has also worked in sales and tech support. Troubleshooting every nook and cranny is his customer-service superpower. One interesting bit of trivia about Chris: He doesn't like steak, so he's a cheap date.

LANE BOYER | Support Specialist

PaySchooler since 2018

With a background in information technology, Lane believes in delivering a good experience to every customer, every time. His customer-service superpower? A remarkable memory. Lane plays the electric guitar and can do eighth-note triplets at 300 beats per minute.

THE PAYSCHOOLS SUPPORT TEAM

SUE CLARK | Administrative Specialist

PaySchooler since 2005

Before PaySchools, Sue worked for a magazine company doing data entry and page layout.

Her customer-service philosophy: "We're all in this together." Customers appreciate Sue's friendly, calming, and positive manner. Sue is an avid animal lover with a rescue lab-mix.

BETSY CORNELL | Technical Support Specialist and Installer

PaySchooler since 2015

Betsy has a law degree and was a truck driver, chef, and school food-service director for 30 years before joining PaySchools. She believes our products should make the customer's job easier, and support calls are also teaching moments. Fun fact: Betsy rides unicycles!

ADRIAN DRLIK | Support Manager

PaySchooler since 2001

Before PaySchools, Adrian was all about golf, working at country clubs in roles ranging from bag-room attendant to assistant golf pro. "Treat customers with kindness and patience," he says. "Build that relationship." Outside work, Adrian loves coaching sports and spending time with his family.

JUSTIN ESBER | Senior Technical Support Specialist

PaySchooler since 2003

As a teenager, Justin worked for his father's company, Esber Cash Register, which was later acquired by PaySchools. He's been here ever since and has extensive product knowledge. Justin has three children and enjoys bowling, wakeboarding, and snowboarding.

THE PAYSCHOOLS SUPPORT TEAM

MENA GABRA | Key Account Manager

PaySchooler since 2006

Mena joined PaySchools with a background as a franchise restaurant point-of-sale installer and trainer and operations manager. His customer-service superpower is thinking outside the box to find answers and solve problems. Mena is a pro at ping-pong.

AMBER MENGE | Product Manager

PaySchooler since 2012

Amber's role is to monitor and use customer feedback and support needs to facilitate ongoing product development and improvement. "Customers are key to software being easy and fast," she said. "They help us design and enhance our products." Amber is a mom to a little boy and a little girl.

ROB MORALES | Technical Support Specialist and Installer

PaySchooler since 2017

Rob worked for a PaySchools distributor before joining our support team. His customer-service superpower: "I'm human! For our customers, being able to speak to an actual human on the phone is rare these days." In his spare time, Rob is a portrait/lifestyle photographer.

BRANDY MORRISON | Support Specialist

PaySchooler since 2015

Pre-PaySchools, Brandy was a dog groomer. She believes in answering the phone with a smile "because customers can hear it in your voice" and ending every email on a positive note. She's married to her high-school sweetheart and is a mom and watercolor artist.

THE PAYSCHOOLS SUPPORT TEAM

ANGELA NOHL | Support Specialist

PaySchooler since 2020

Angela has worked in customer service and software support for many years. She's known for her honesty and her friendly, calming presence on the phone. A self-described "cat lady," Angela has a cat with its own Facebook page.

CHRIS O'NEIL | Key Account Manager

PaySchooler since 2015

"We're here to make your life easier," says Chris, who has worked as a landscaping project manager and holds an MBA. His customer-service superpower is going the extra mile. Chris claims to hold the world record for the most pairs of sunglasses purchased and lost.

TONY PICCARI

Technical Support Specialist

PaySchooler since 2010

Tony joined PaySchools after stints at the Pro Football Hall of Fame and a local Parks & Rec department. He's great at helping customers without technical backgrounds learn to use our software. Tony is a husband, dad, and die-hard Cleveland sports fan.

NICHOLAS STEVEN SIMA | Support Specialist

PaySchooler since 2019

Nicholas has been a salesman, an umpire, and a grocery bagger. His customer-service philosophy: "You never know what someone else is going through, so treat everyone with respect and kindness." He loves the stillness of meditation and the adventure of snowboarding.

THE PAYSCHOOLS SUPPORT TEAM

NANCY E. SUTTON | Technical Support Specialist and Installer

PaySchooler since 2014

Nancy knows schools. Pre-PaySchools she worked as a district para, substitute, athletic secretary, and bookkeeper. "If I can't answer your question, I'll find someone who can," she says. Nancy can also buck bales, stretch fence, break horses, and cook on a woodburning stove.

BROCK TINNEY | Technical Support Specialist

PaySchooler since 2018

With a background in technical support and web design, Brock believes in solving problems for customers. On the team, he's known for his hard work and productivity. In his free time, Brock enjoys modifying cars.

HOW TO CONTACT PAYSCHOOLS CUSTOMER SUPPORT

NOTE: We answer emails within 30 minutes, but calling by phone is always the fastest way to resolve your issue.

FOR DISTRICT STAFF

BY PHONE
1-800-669-0792, Option 1

Select the product you need help with:
1. Cafeteria—Lunch software
2. Cafeteria—cashier hardware
3. Meal Applications
4. Online payments—Central or PayForIt
5. Admin

District support center hours of operation:
7 a.m. – 6 p.m. Eastern Standard Time, Monday – Friday

If you leave a message after hours, we'll call you back as soon as we can.

BY EMAIL
support@payschools.com

Title your subject line:
(District name) + brief description of problem

Body of email: Please give a detailed description of the issue you need help with. When appropriate, please include photos, screen captures, internal email threads, etc. The more information, the better!

TRAINING VIDEO LIBRARY
www.payschools.com/training

FOR PARENTS

BY PHONE
1-877-393-6628

BY EMAIL
PSC_help@payschools.com

Parent support center hours of operation:
8:30 a.m. – 7:30 p.m. Eastern Standard Time, Monday – Friday

THE i3 VERTICALS EDUCATION SOFTWARE FAMILY

PARENT PAYMENTS

With our software, parents can easily pay for student lunches, fees, and more...anywhere, on any device. And school staff also use our browser-based tools to log every purchase and payment.

PaySchools Central

PaySchools Marketplace

NUTRITION SERVICES

Our cafeteria cashier software and hardware speed up lunch lines, integrate vending, sync with online parent payments, and even help optimize food inventory.

PaySchools Lunch

PaySchools Meal Applications

PaySchools Inventory

TICKETING AND EVENTS

Our events software allows schools to sell barcoded events tickets online and in person.

PaySchools Events

PaySchools
An i3 Verticals Brand

i3 innovates the technology and energizes the resources powering PaySchools.

www.payschools.com