



# Release Notes

## Improvements When Storing Payment Information for Families

### General Overview

Previously, iClassPro implemented advanced steps for the Customer Portal/Mobile App to allow customers to more easily opt-in and opt-out of recurring billing and stay informed of their recurring billing status. However, the system was using the same email templates for changes made by staff in the Office Portal.

The purpose of this task is to improve the process of storing a payment method for families and being able to opt that payment method in or out of recurring billing (when permissions allow them to do so). It will also improve communications with customers by using different email templates depending on whether this recurring billing status was changed by the customer via the Customer Portal/Mobile App or by a staff member via the Office Portal.

iClassPro will also update the process of storing payment information on file to more easily allow staff to opt a payment method out of recurring billing when initially saving the information. (Previously all customers were opted in for recurring billing upon the initial save and had to be opted out later.)

### How will this benefit me?

This update will improve communications with your customers regarding their recurring billing status by more easily identifying exactly which party changed the payment status. It will also streamline the process for staff members saving payment information to the family profile in

the Office Portal by allowing them to opt the payment method out of recurring billing when initially saving the information.

## Where will I see these changes?

These changes will affect the Office Portal and Customer Portal/Mobile App.

## What is being changed/added?

- iClassPro will be implementing a separate email template to be used whenever a staff member enables the "This payment method is authorized for recurring billing" option for the family in the Office Portal.
- We will implement two new email templates to be sent whenever a family is opted out of recurring billing, either via the Customer Portal or by a staff member in the Office Portal.
- We will also be adding verbiage to the existing Customer Portal email template and new Office Portal template to explain how customers can request to be opted out of recurring billing.
- Adding the ability for staff to disable the "This payment method is authorized for recurring billing" option for the family when initially saving payment information. Currently, this option is not displayed until the payment information has already been saved, and is enabled by default.

## How does this work with existing settings?

This update enhances some existing workflow settings and adds additional automated email templates to be used when a family's recurring billing status has been changed via the Office Portal.