

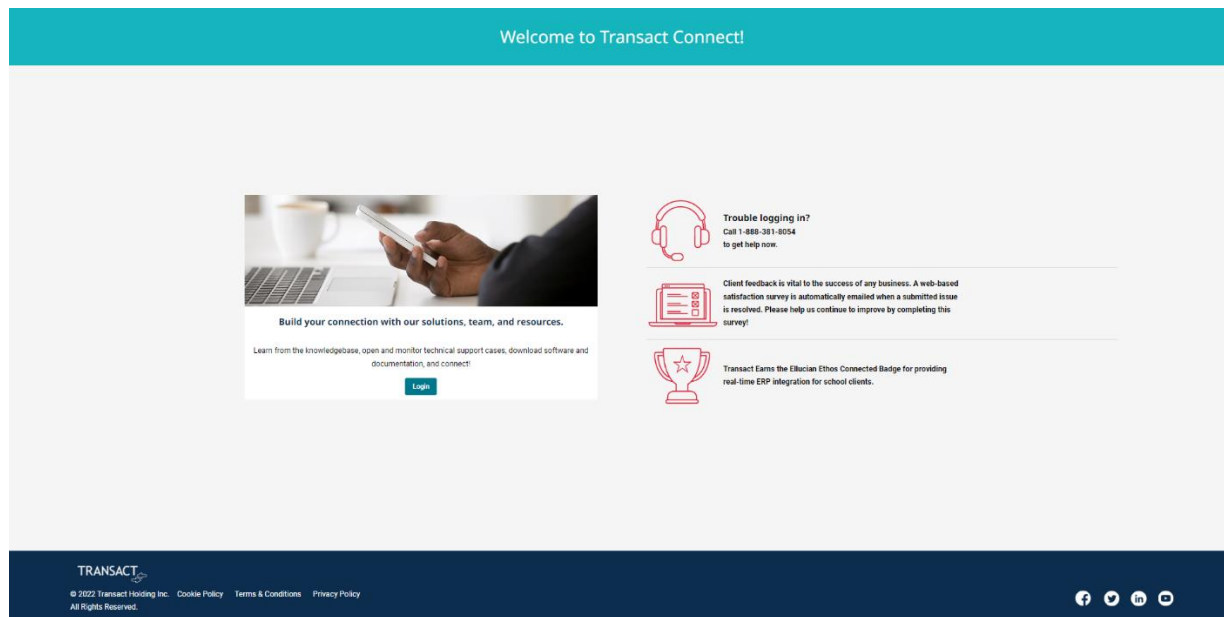
## Contents

- Access ..... 2
- Registration and Login ..... 3
- Home ..... 7
- System Status ..... 7
  - View System History ..... 8
  - Add/ Edit Text Notifications ..... 9
  - Add/ Edit Email Notifications ..... 10
- Bulletins ..... 12
- Cases ..... 14
  - Create a Case ..... 14
  - Add Comment or Attachment to an Existing Case ..... 17
- Library ..... 20
  - My Resources ..... 20
  - System Files ..... 22
  - Documents ..... 24
  - Knowledge Base Articles ..... 26
  - Knowledge Base Feedback ..... 28
  - FSPF ..... 28
- Administration ..... 31
  - Add New User ..... 31
  - Deactivate User ..... 34
  - Add a Product License ..... 36
  - Remove Product License ..... 38
  - Add Portal Permissions ..... 39
  - Remove Portal Permissions ..... 42
- Manage Partner Account ..... 44
- User Profile ..... 46

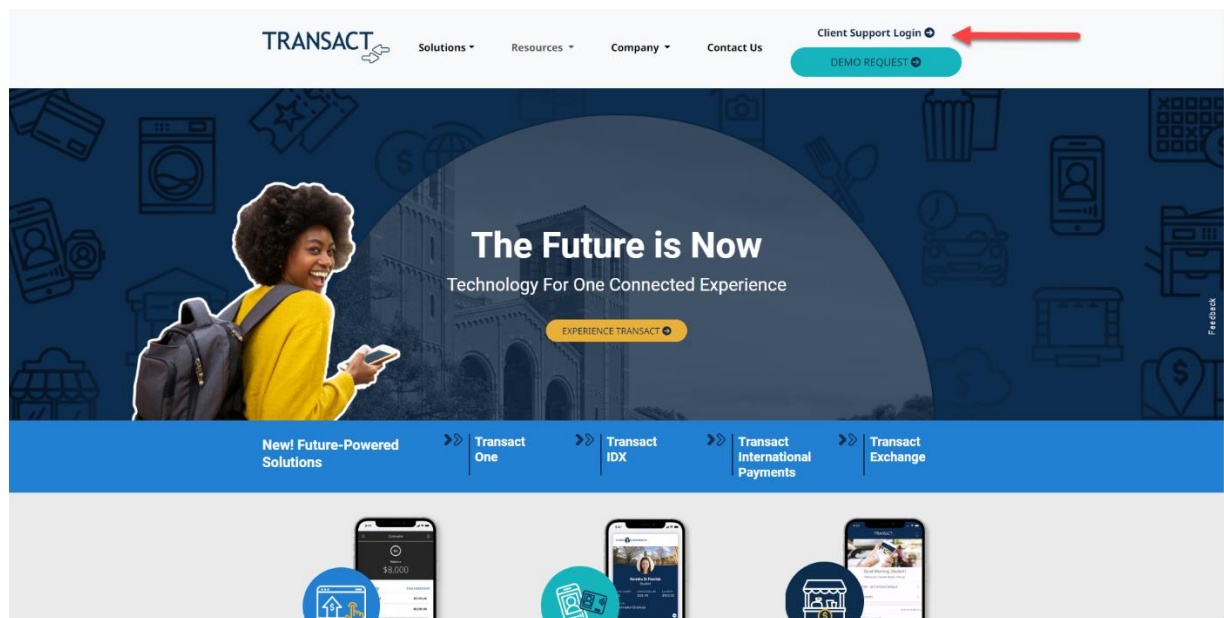
# TRANSACT Client Portal User Guide

## Access

Direct: <https://connect.transactcampus.com/>




Alternative: <https://transactcampus.com/>



## Registration and Login

A verification email will be sent to your email account > Click on link >



---

Congratulations! A new [Transact Connect](#) client support and services portal account has been created for [michelle.carpentier@transactcampus.com](mailto:michelle.carpentier@transactcampus.com). This email provides instructions for accessing your new account.

**How can Transact Connect help me?**

[Transact Connect](#) is your resource for submitting a technical support case and accessing the knowledgebase and tools to facilitate support for all your Transact solutions.

Key capabilities include:

- Get help by opening new and managing support cases.
- Stay informed by signing up for important systems notifications and bulletins.
- Search our knowledgebase of help and support-related content.
- Download software updates, software, and other files.
- Manage user account information and licenses.

**What actions do you need to take?**

To gain access to Transact Connect, you will be required to validate your account. Please do the following:

1. Access the Transact Connect Welcome page to verify your email, using this link: [Email Verification Link](#)
2. Enter the email associated with your account and select "Send Verification Code."
3. You will receive an email from MicrosoftOnline.com containing the verification code.
4. Enter this code on the Transact Connect Welcome page and press "Verify," then press "Continue."
5. Create your new password for the account.
6. You will now be able to log in to the new [Transact Connect](#) portal with your email and new password

If you need help, a detailed description of the validation process, including example screens, is provided in the [Transact - Client Portal User Guide](#).

Once your account has been successfully validated, you will be able to access the new [Transact Connect](#) site at any time or through our Support Page on our [TransactCampus.com](#) web site.

If you have any trouble accessing the new portal, please call 1-888-381-8054 for immediate help.

Thank you,  
Your Transact Support Team



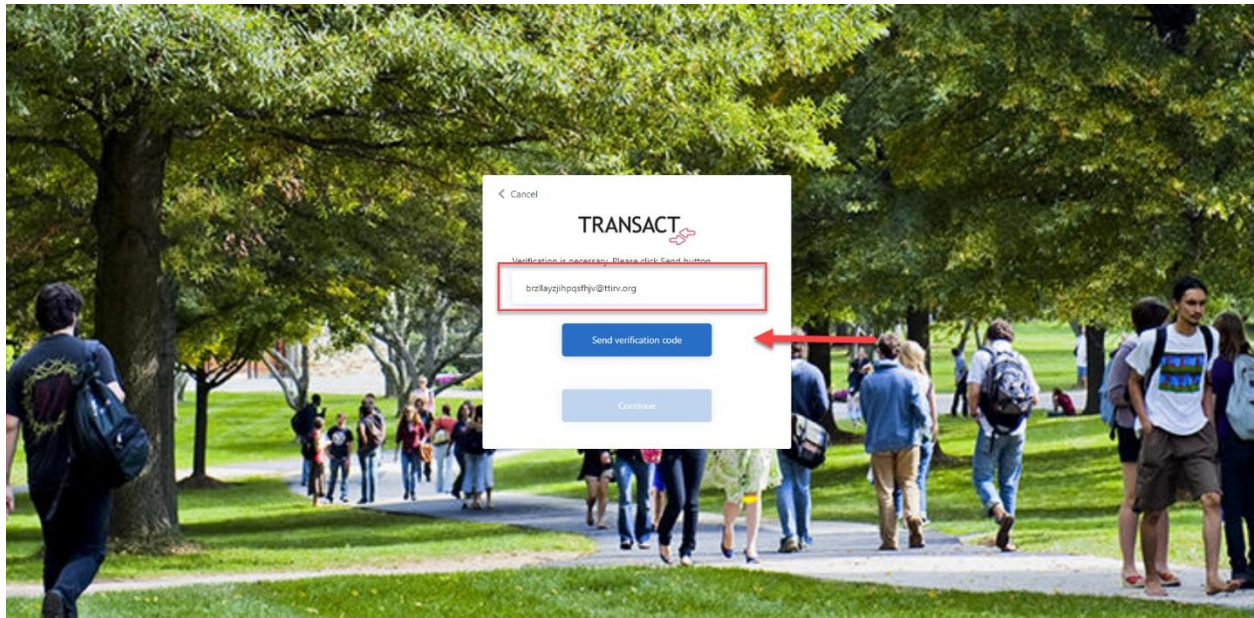
22601 N 19th Ave, Suite 130, Phoenix, AZ 85027

This message was sent to [michelle.carpentier@transactcampus.com](mailto:michelle.carpentier@transactcampus.com) by Transact.



We respect your privacy. Access our [privacy policy](#).  
© 2020. Transact Holdings Inc. All rights reserved.

The link will direct you to the Transact Connect login screen > Type your email > Click, Send verification code >



Once the verification code is received > copy it and return to the login screen >

Verify your email address


Thanks for verifying your [michelle.carpentier@valorepartners.com](mailto:michelle.carpentier@valorepartners.com) account!

**Your code is: 916379**

Sincerely,  
*TransactClientPortalProd*

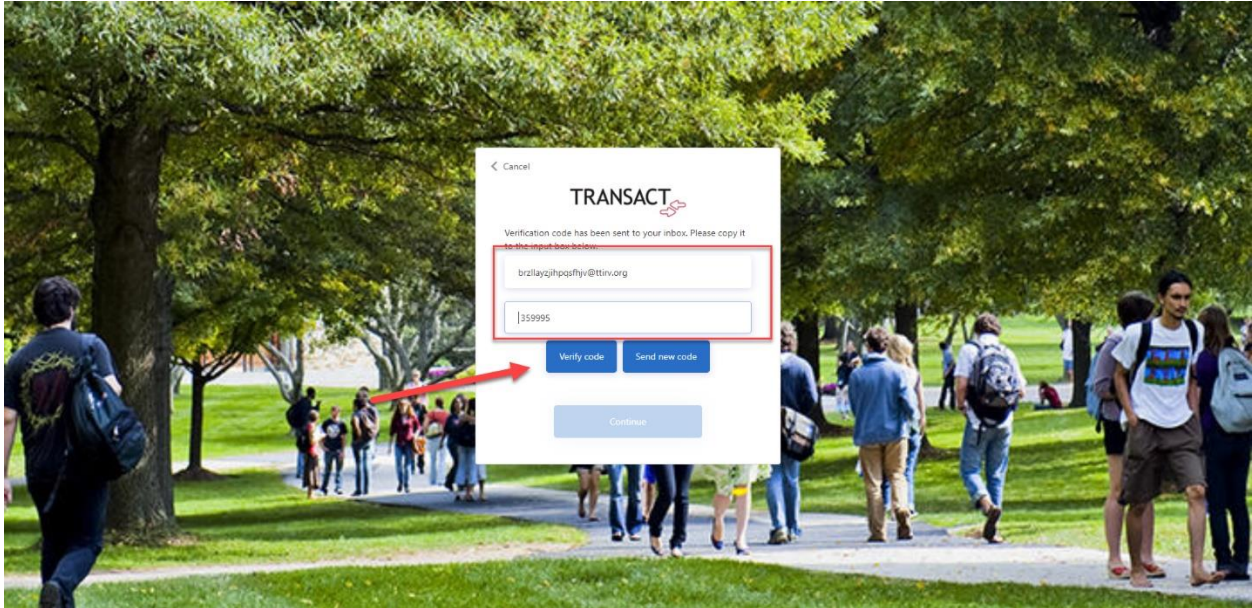
---

This message was sent from an unmonitored email address. Please do not reply to this message.

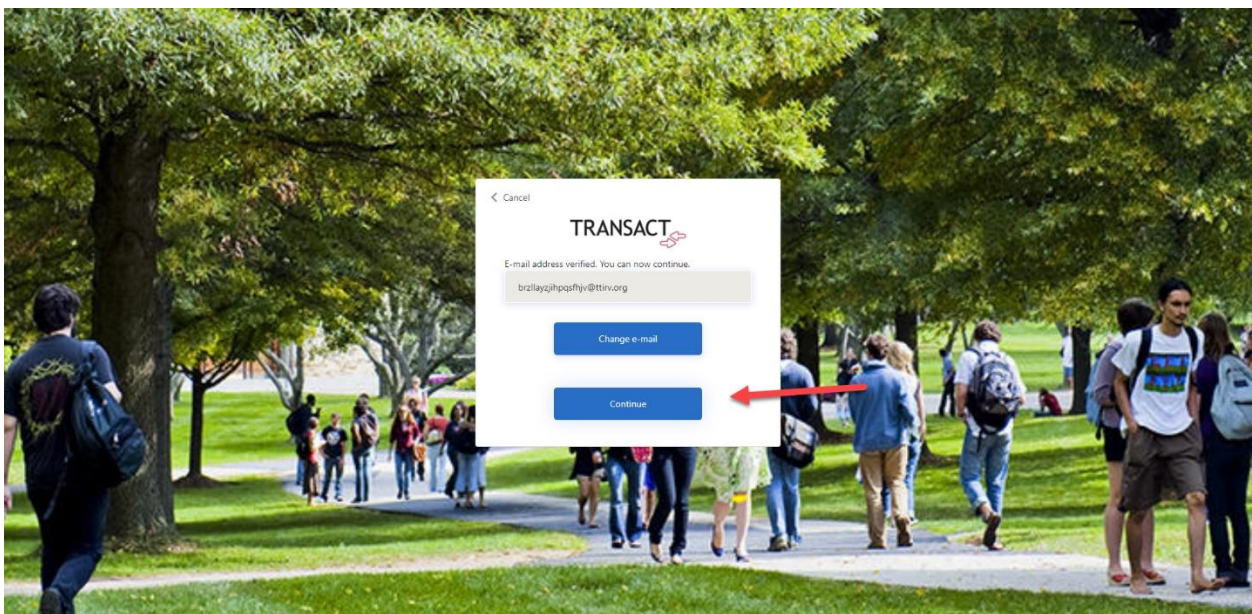
TRANSACT 



Paste code > Click, Verify code >

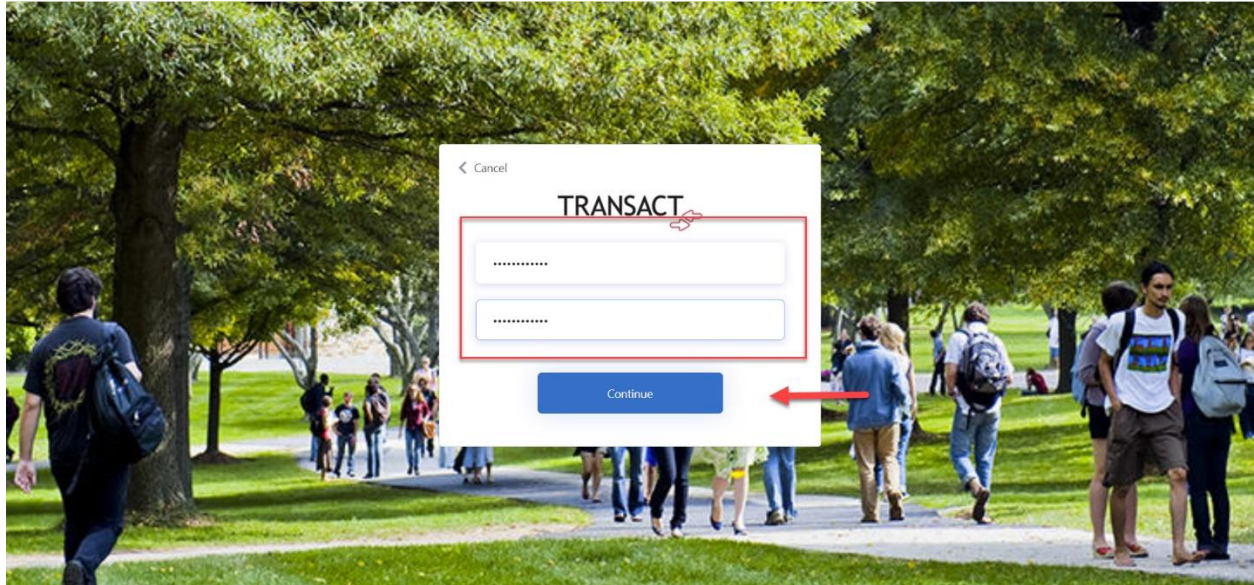


Click, Continue >



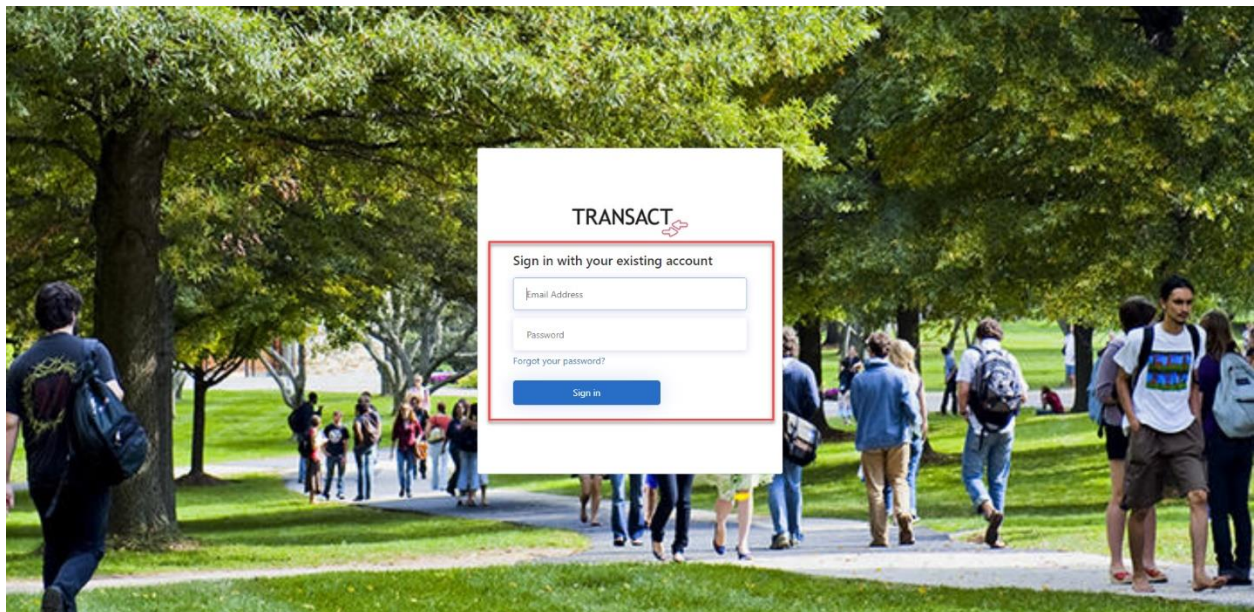


Set password > Click, Continue >



**\*\*Email and Password credentials now confirmed\*\***

Login >



## Home

Quick access to System Statuses, Cases Needing Attention and Bulletins.

The screenshot shows the TRANSACT Home dashboard. At the top, there is a navigation bar with tabs for Home, System Status, Bulletins, Invoices, Renewals, Cases, Library, and Administration. The main content area is divided into four sections:

- Cases Needing Attention:** A table with columns for Created, Case Number, Title, Product License, and Status. One case is listed with Case Number 603656 and Status 'Client Response Required'.
- System Status:** A table with columns for System and Status. It lists several systems with their current status and any recent issues.
- Open Invoices:** A section indicating there are no open invoices.
- Bulletins:** A table with columns for Title and Released. One bulletin is listed regarding a Cloud FPGS & 9.13.14 Patch Release Update.

The footer contains the TRANSACT logo, copyright information for 2022, and social media icons for Facebook, Twitter, LinkedIn, and YouTube.

## System Status

The screenshot shows the TRANSACT System Status page. The navigation bar is the same as in the Home view. The main content area displays the following sections:

- TSE Cloud Deployed:** Shows the system is hosted and operating normally as of August 13, 2020.
- eAccounts:** Shows the student self-service portal is operating normally as of August 3, 2020.
- Online Photo Submission:** Shows the self-service photo submission application is operating normally as of August 3, 2020.
- Attendance:** Shows the class attendance tracking application is operating normally as of August 3, 2020.
- Text Message Notifications:** A toggle switch set to 'Off' for the phone number (855) 278-5080.
- Email Notifications:** A toggle switch set to 'Off' for the email address michel.carpentier@transactcampus.com.

The footer is identical to the Home page, featuring the TRANSACT logo, copyright information, and social media icons.

## View System History

Click, View History >

The screenshot shows the 'System Status' page in the TRANSACT Client Portal. The page lists several systems with their descriptions and current status. A red arrow points to the 'View History' link for the 'TSE Cloud Deployed' system.

Description	Status
Hosted Transaction System Enterprise (TSE)	Aug 13, 2020, 10:22:40 AM: System is operating normally
Student self-service portal for Transaction System Enterprise (TSE)	Aug 3, 2020, 7:03:55 AM: System is operating normally
Self-service photo submission application	Aug 3, 2020, 7:04:33 AM: System is operating normally
Class attendance tracking application	Aug 3, 2020, 7:04:50 AM: System is operating normally

Text Message Notifications: Off (855) 278-5080, Systems: None

Email Notifications: Off, michelle.carpenter@transactcampus.com, Systems: None

The screenshot shows the 'Status History' page for 'CampusCash Settlement'. It displays a table of incidents with search and filter options.

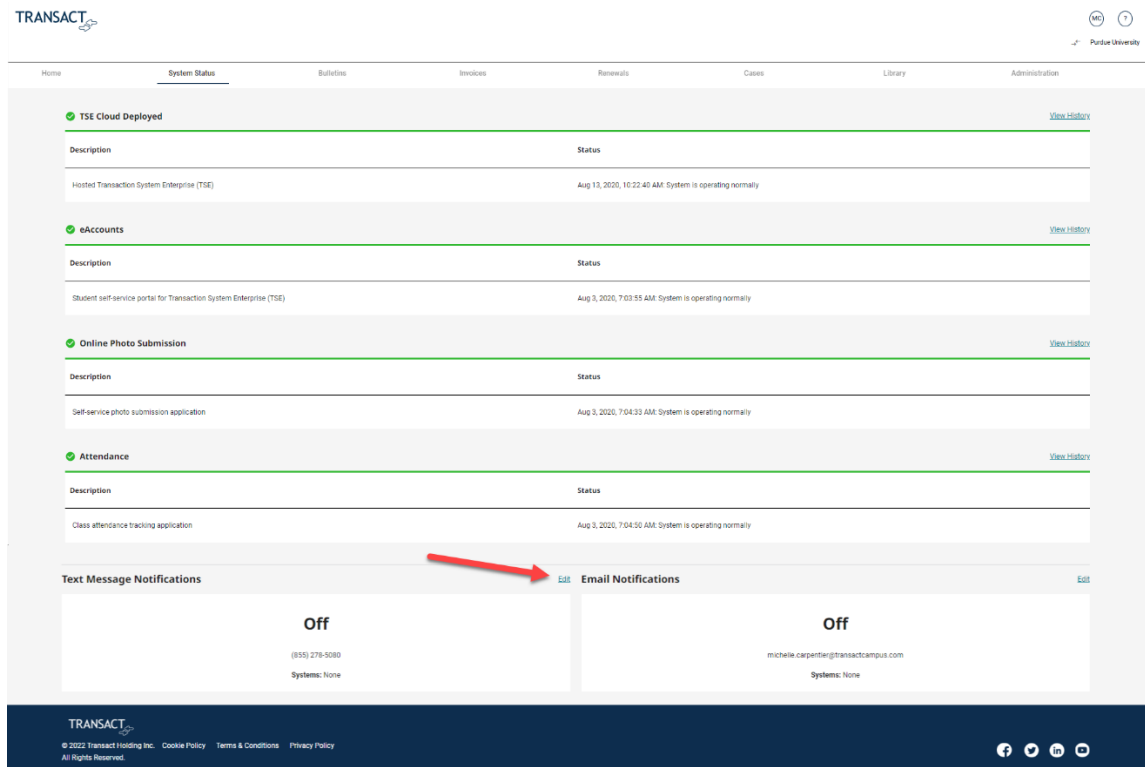
2 Incidents | Search History | Last 30 Days | Start Date: 10/16/2022 | End Date: 11/16/2022

Date	Status	Supporting Documents
Aug 4, 2020	1:53 PM: System is operating normally	
Aug 3, 2020	7:03 AM: System is operating normally	

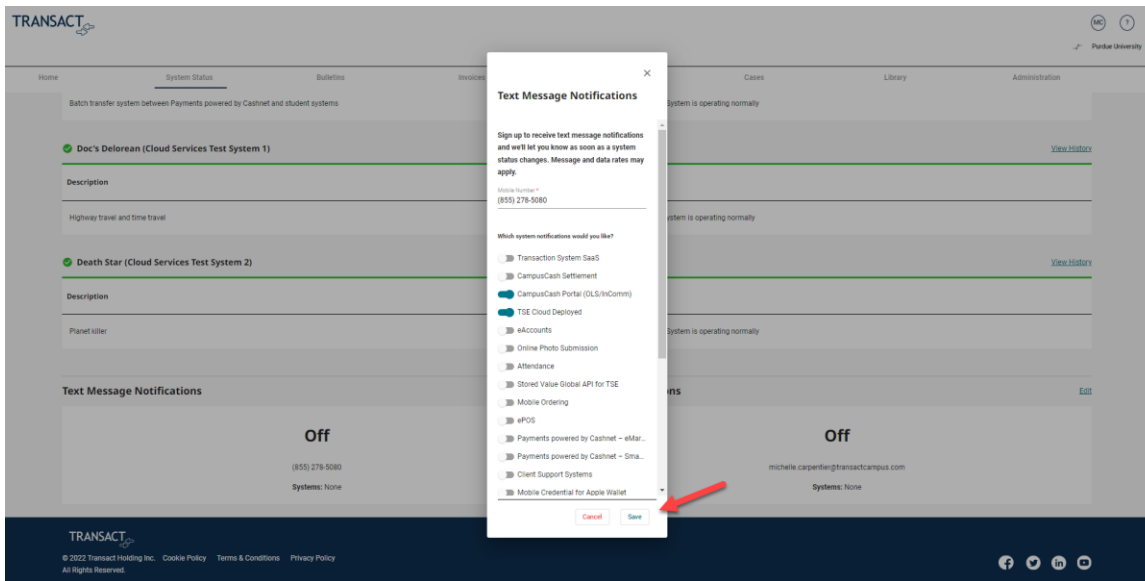


## Add/ Edit Text Notifications

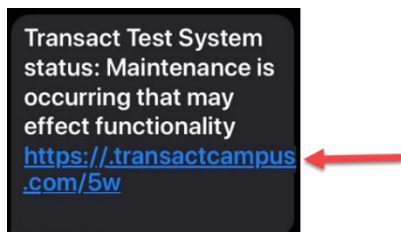
From the System Status tab > Click, Edit >



Add Mobile Number > Choose system > Click, Save.

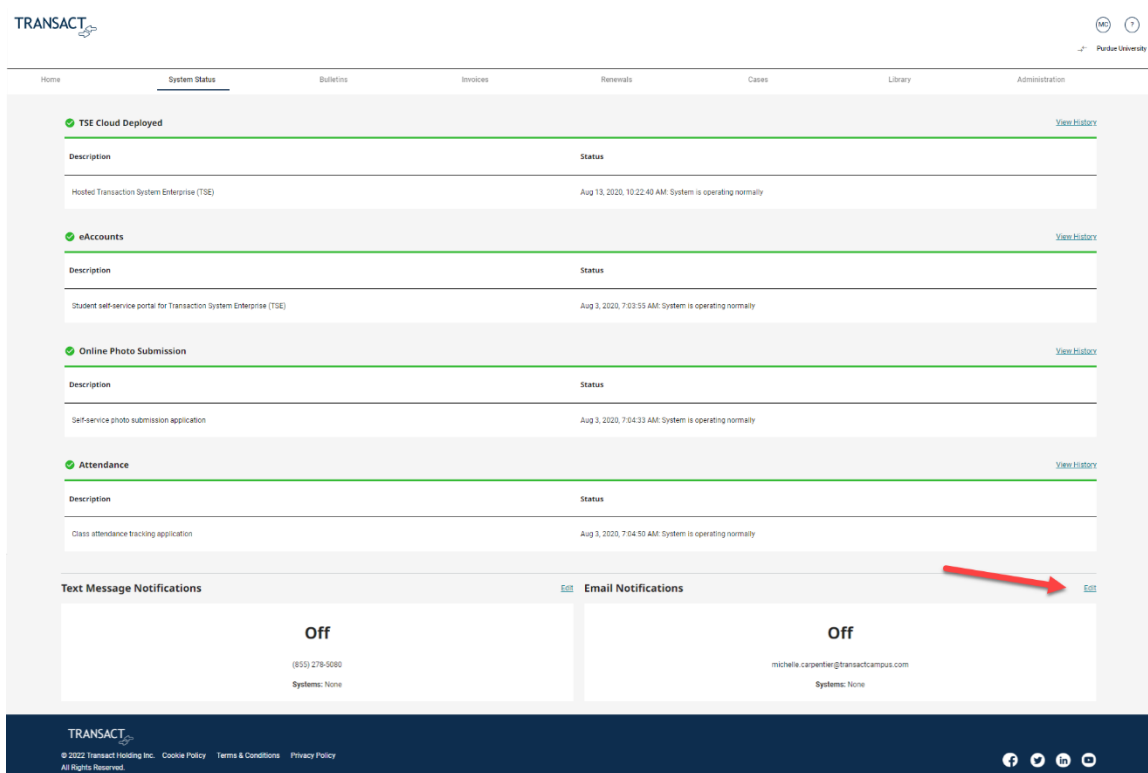



User will receive text messages regarding system updates. Click link to access system >



## Add/ Edit Email Notifications

Click, Edit >



TRANSACT  Profile University

Home **System Status** Bulletins Invoices Renewals Cases Library Administration

**TSE Cloud Deployed** [View History](#)

Description	Status
Hosted Transaction System Enterprise (TSE)	Aug 13, 2020, 10:22:40 AM: System is operating normally

**eAccounts** [View History](#)

Description	Status
Student self-service portal for Transaction System Enterprise (TSE)	Aug 3, 2020, 7:03:55 AM: System is operating normally

**Online Photo Submission** [View History](#)



Description	Status
Self-service photo submission application	Aug 3, 2020, 7:04:33 AM: System is operating normally

**Attendance** [View History](#)

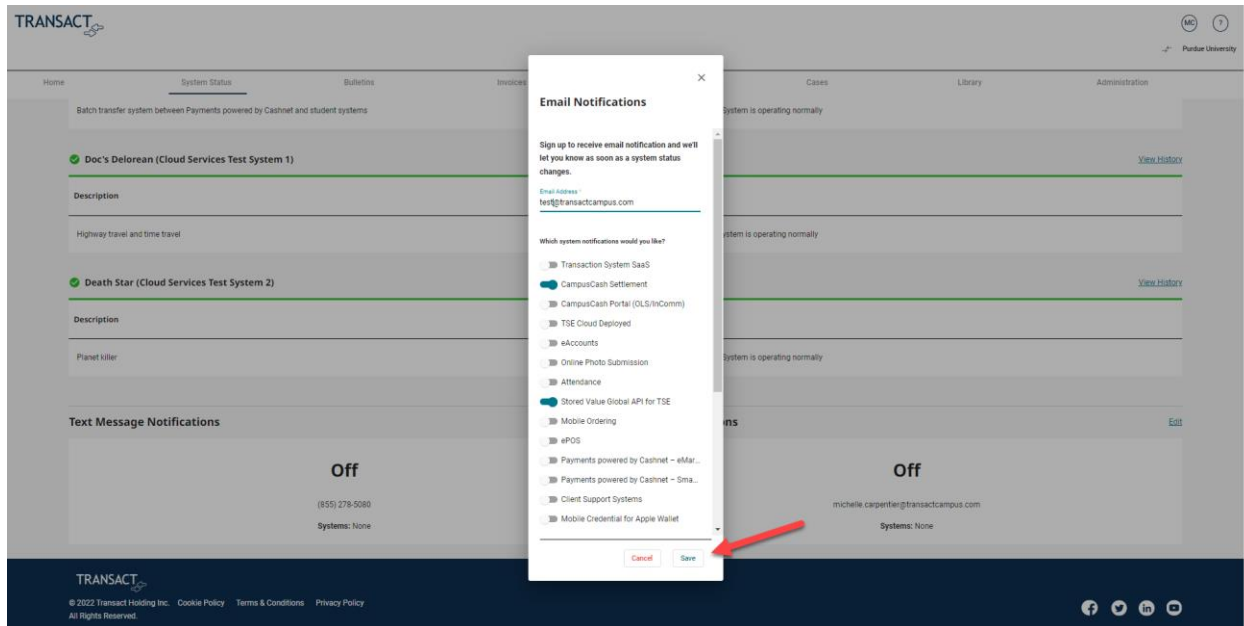
Description	Status
Class attendance tracking application	Aug 3, 2020, 7:04:50 AM: System is operating normally

**Text Message Notifications** [Edit](#) **Email Notifications** [Edit](#)

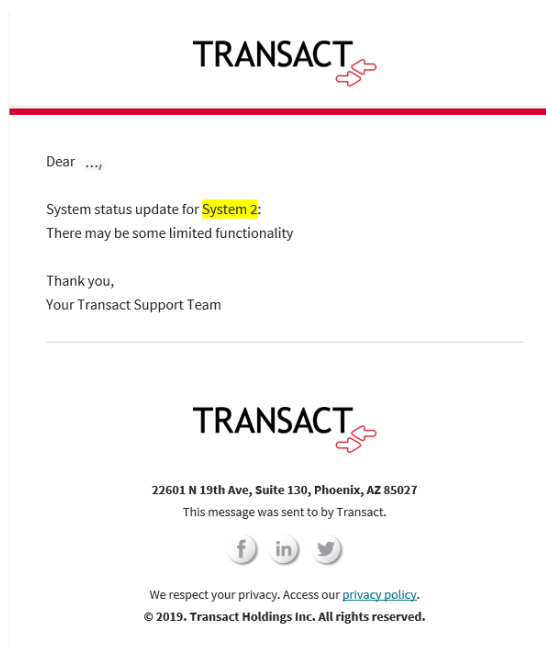
<b>Off</b> (855) 278-5080 Systems: None	<b>Off</b> michelle.carpentier@transactcampus.com Systems: None
---	---

TRANSACT  © 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#) 

Add email address > choose system > Click, Save.

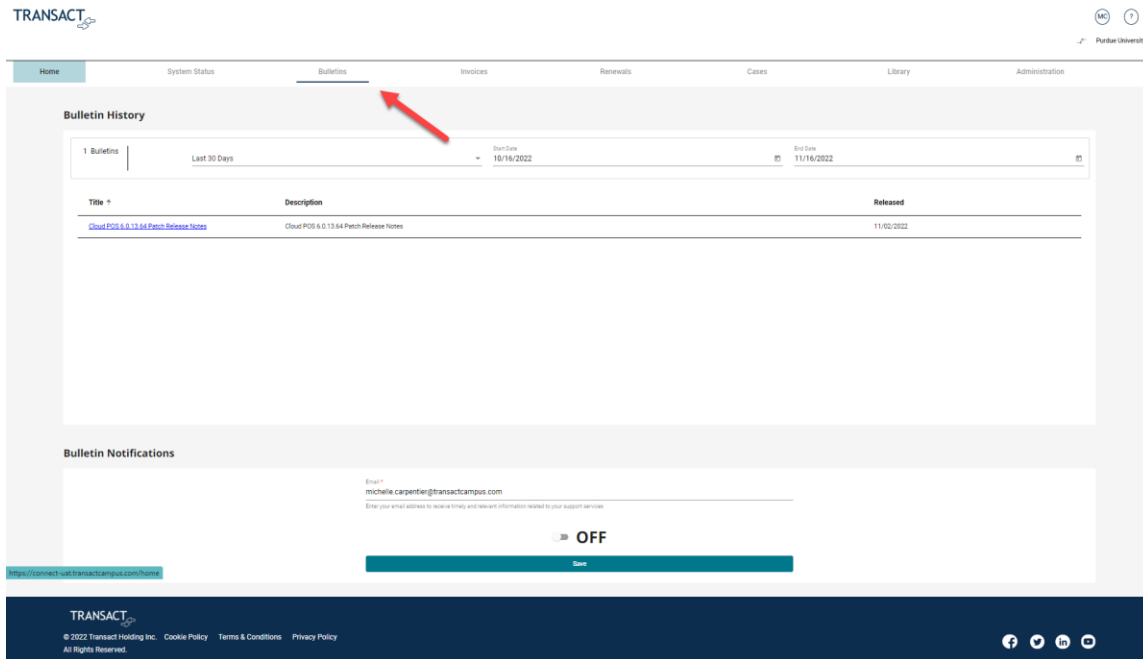


User will receive emails regarding system updates.

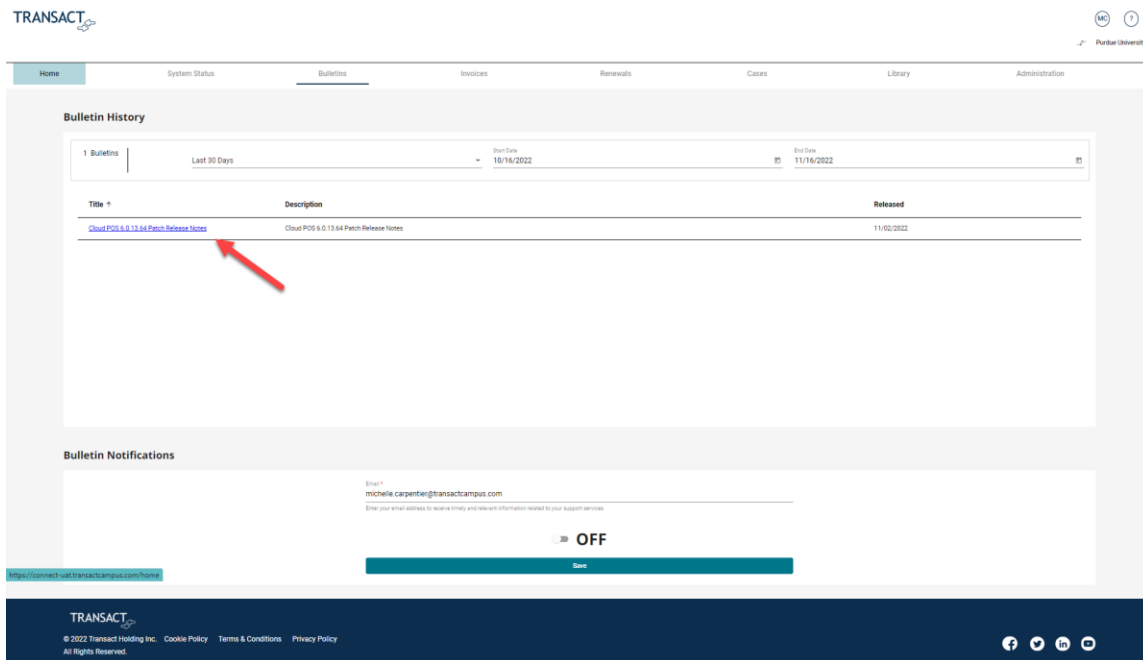


## Bulletins

Click Bulletins in top navigation bar >



From the Bulletin tab you can filter dates and access the bulletin via the associated hyperlink >





**Cloud POS 6.0.13.64 Patch Release Notes** Released: 11/02/2022

**Description** Cloud POS 6.0.13.64 Patch Release Notes

**Bulletin**

**Overview**  
This release focuses on issues regarding how transactions are saved and routed to kitchen devices. The issues fixed primarily affected Mobile Ordering transactions, but improvements apply to all POS transactions.

**Upgrade Details**  
Transact will deploy the release to the Cloud POS environment. This is a no downtime update.

**Product Version**  
• 6.0.13.64

**Changes and Resolved Issues**

**Routing Job Creation**  
**Issue:** Under heavy load when a Mobile Ordering transaction was saved by Cloud POS, the kitchen routing jobs were not created.  
**Fix:** We have identified and fixed situations where the routing jobs for a transaction failed during creation and a retry was not attempted.

**Transaction Processing Improvements**  
**Issue:** Under heavy load transaction saving and routing job creation could fail, requiring retries and leading to delayed transaction processing.  
**Fix:** We have optimized the transaction saving process to avoid these failures.

© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)

Add or remove email notifications by toggling the yes or no > Click, Save.

**Bulletin History**

1 Bulletin | Last 30 Days | Start Date: 10/16/2022 | End Date: 11/16/2022

Title	Description	Released
<a href="#">Cloud POS 6.0.13.64 Patch Release Notes</a>	Cloud POS 6.0.13.64 Patch Release Notes	11/02/2022

**Bulletin Notifications**

Email: michelle.carpentier@transactcampus.com  
Enter your email address to receive timely and relevant information related to your support services.

OFF

[Save](#)

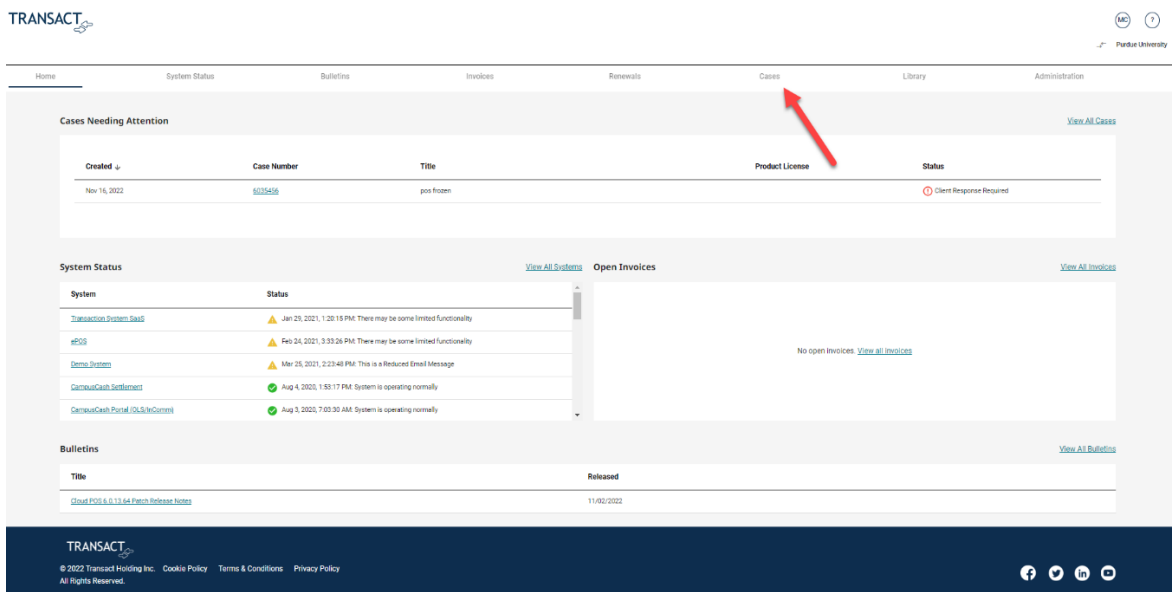
<https://connect-uat.transactcampus.com/home>

© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)

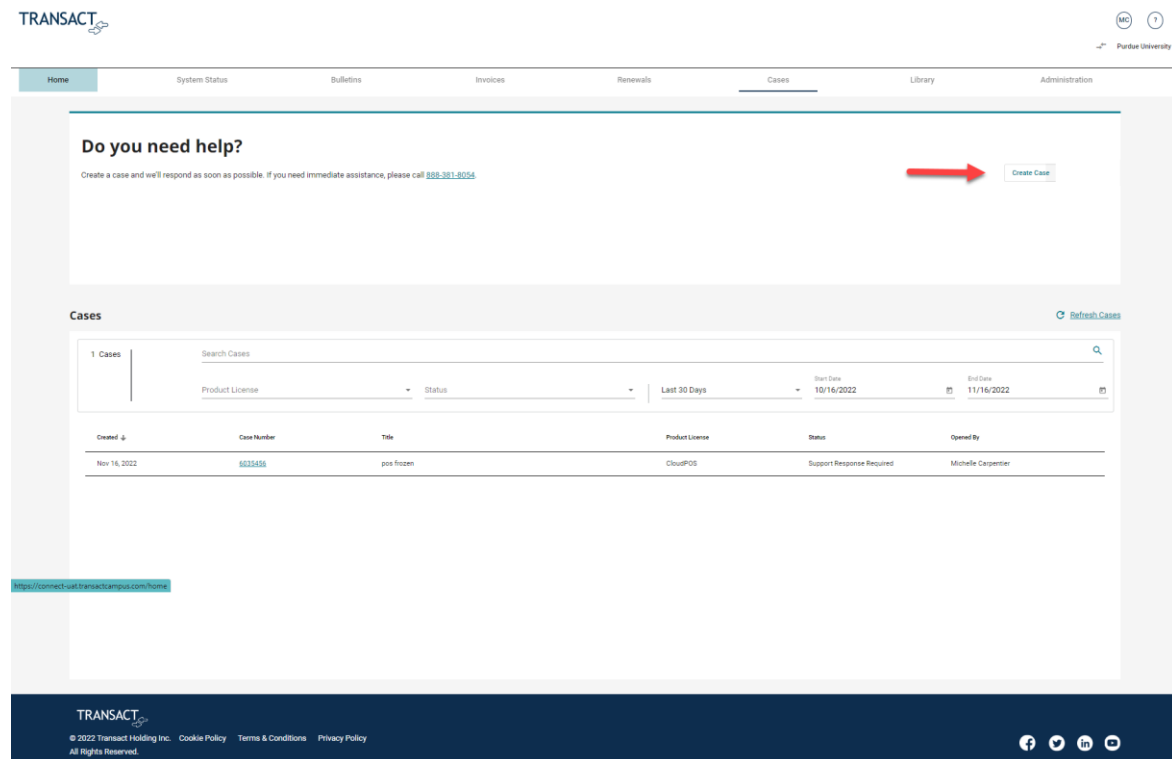
## Cases

Create a Case

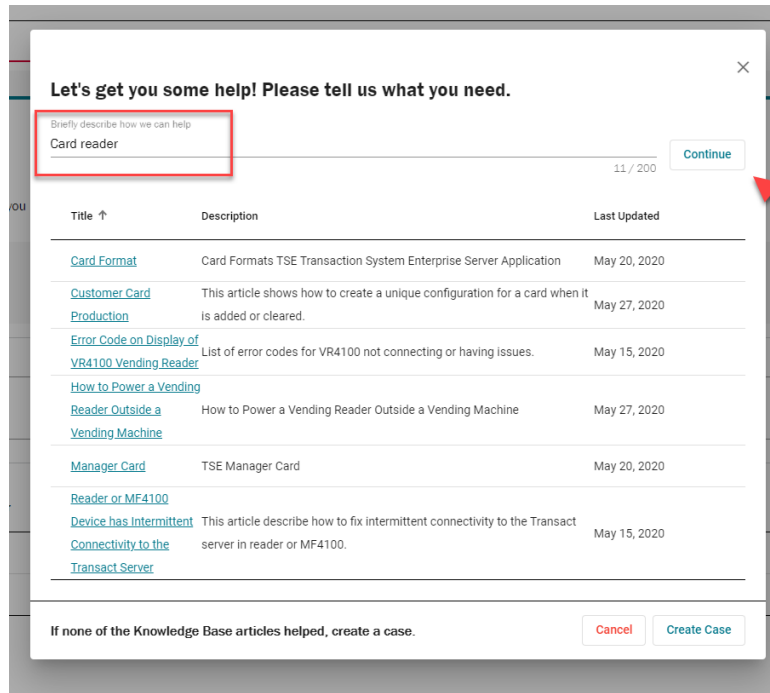
Click, Cases >



Click, Create Case >



Type case title > Click, Continue >



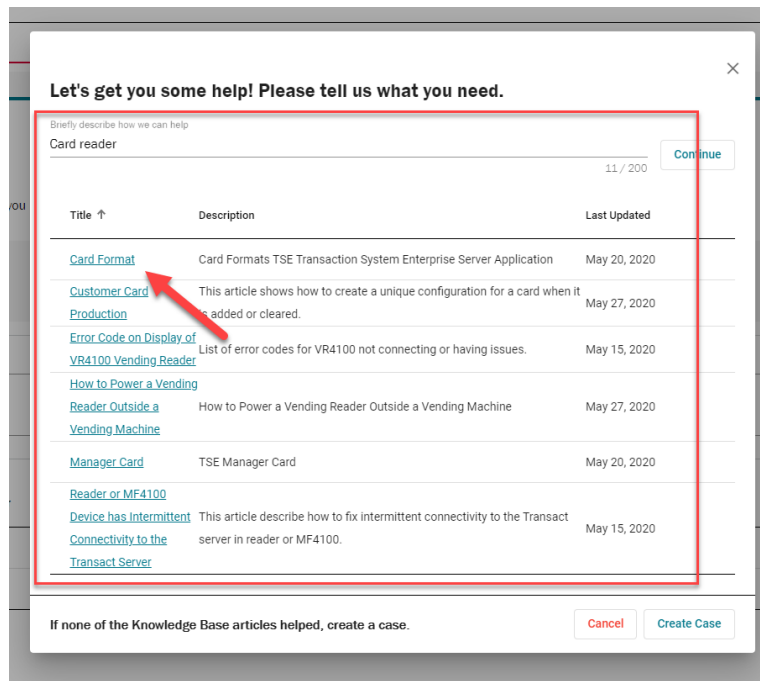
**Let's get you some help! Please tell us what you need.**

Briefly describe how we can help  
 11 / 200 Continue

Title ↑	Description	Last Updated
<a href="#">Card Format</a>	Card Formats TSE Transaction System Enterprise Server Application	May 20, 2020
<a href="#">Customer Card Production</a>	This article shows how to create a unique configuration for a card when it is added or cleared.	May 27, 2020
<a href="#">Error Code on Display of VR4100 Vending Reader</a>	List of error codes for VR4100 not connecting or having issues.	May 15, 2020
<a href="#">How to Power a Vending Reader Outside a Vending Machine</a>	How to Power a Vending Reader Outside a Vending Machine	May 27, 2020
<a href="#">Manager Card</a>	TSE Manager Card	May 20, 2020
<a href="#">Reader or MF4100 Device has Intermittent Connectivity to the Transact Server</a>	This article describe how to fix intermittent connectivity to the Transact server in reader or MF4100.	May 15, 2020

If none of the Knowledge Base articles helped, create a case. Cancel Create Case

Review Knowledge Base articles for solution > Click title of article to view >



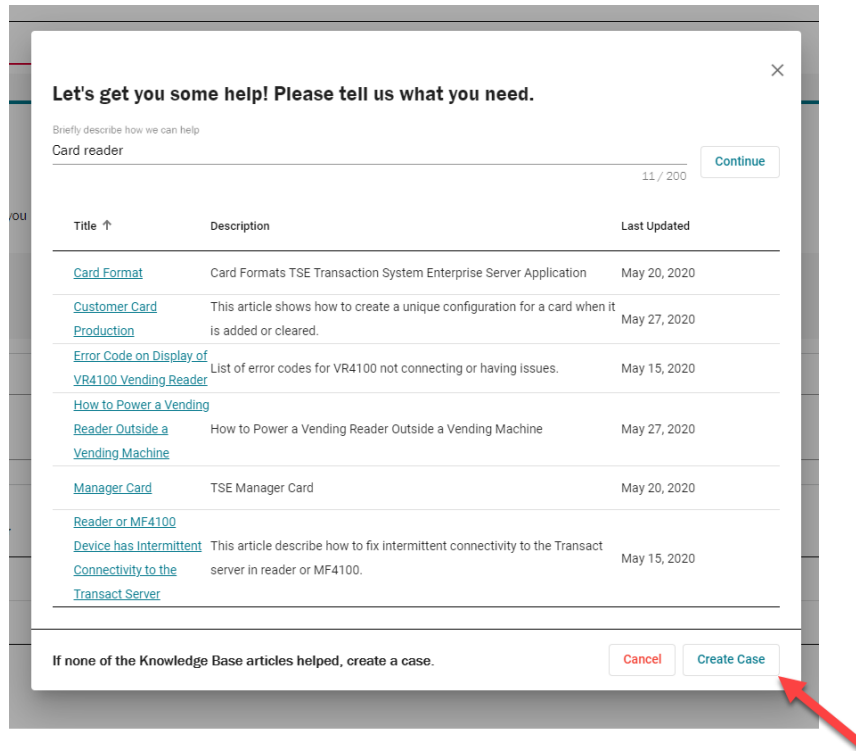
**Let's get you some help! Please tell us what you need.**

Briefly describe how we can help  
 11 / 200 Continue

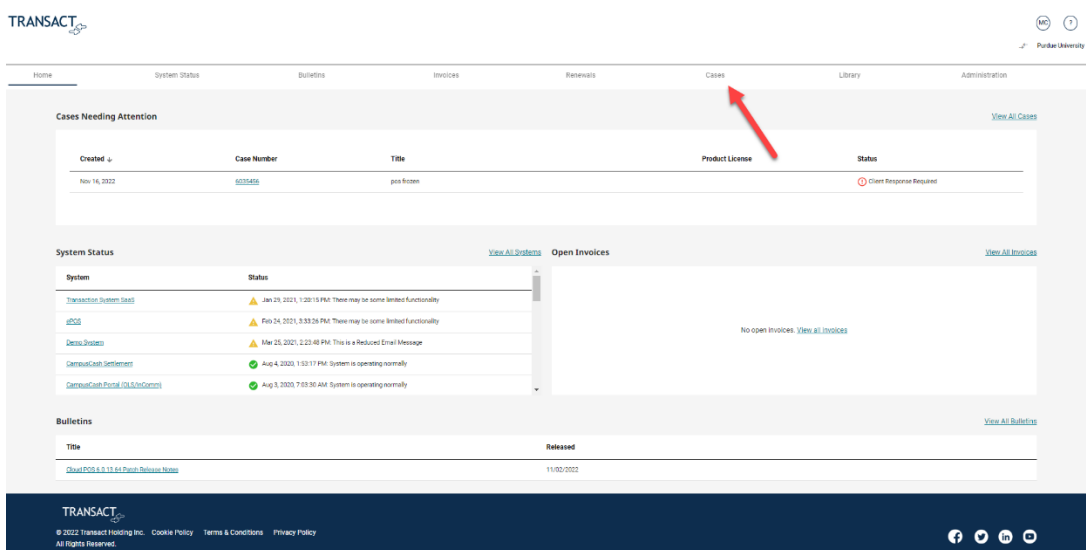
Title ↑	Description	Last Updated
<a href="#">Card Format</a>	Card Formats TSE Transaction System Enterprise Server Application	May 20, 2020
<a href="#">Customer Card Production</a>	This article shows how to create a unique configuration for a card when it is added or cleared.	May 27, 2020
<a href="#">Error Code on Display of VR4100 Vending Reader</a>	List of error codes for VR4100 not connecting or having issues.	May 15, 2020
<a href="#">How to Power a Vending Reader Outside a Vending Machine</a>	How to Power a Vending Reader Outside a Vending Machine	May 27, 2020
<a href="#">Manager Card</a>	TSE Manager Card	May 20, 2020
<a href="#">Reader or MF4100 Device has Intermittent Connectivity to the Transact Server</a>	This article describe how to fix intermittent connectivity to the Transact server in reader or MF4100.	May 15, 2020

If none of the Knowledge Base articles helped, create a case. Cancel Create Case

If KB article does not help, click, Create Case>

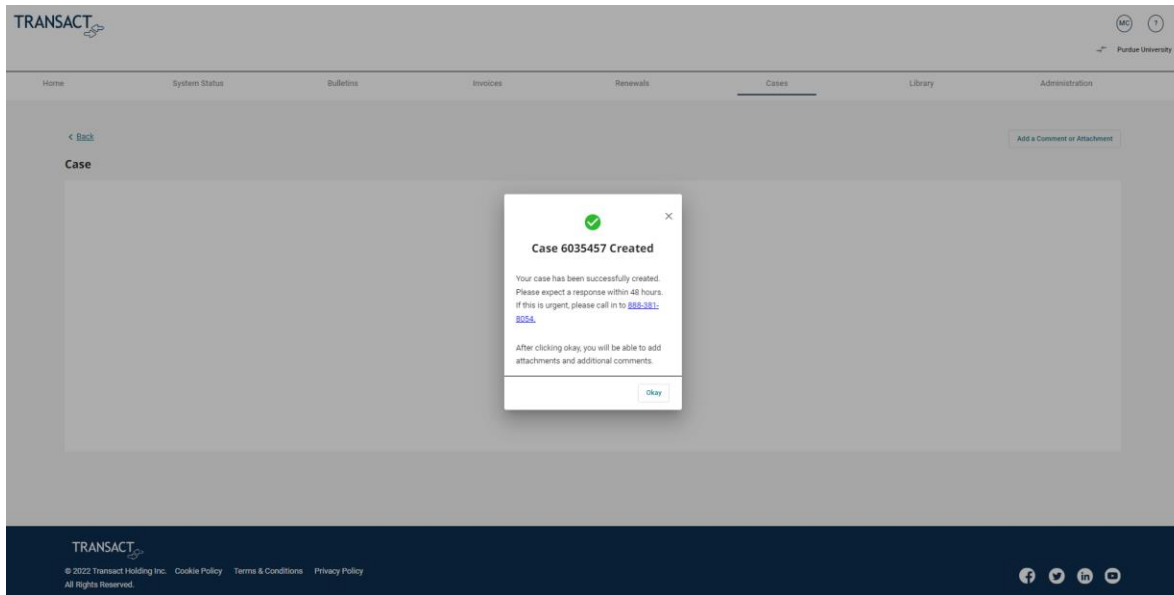


Complete required fields > Click, Create Case.

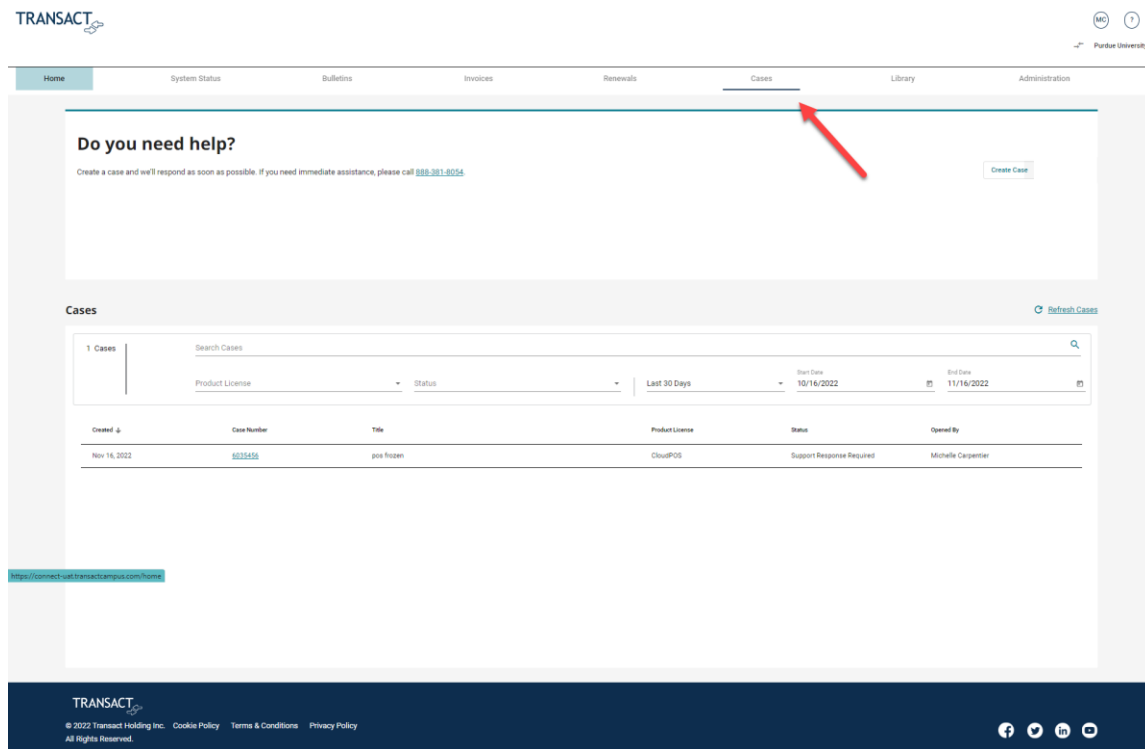




Case created > Click, Okay >



Add Comment or Attachment to an Existing Case  
Click, Cases >



# TRANSACT Client Portal User Guide

Use filter as needed > Click on case number to open case >

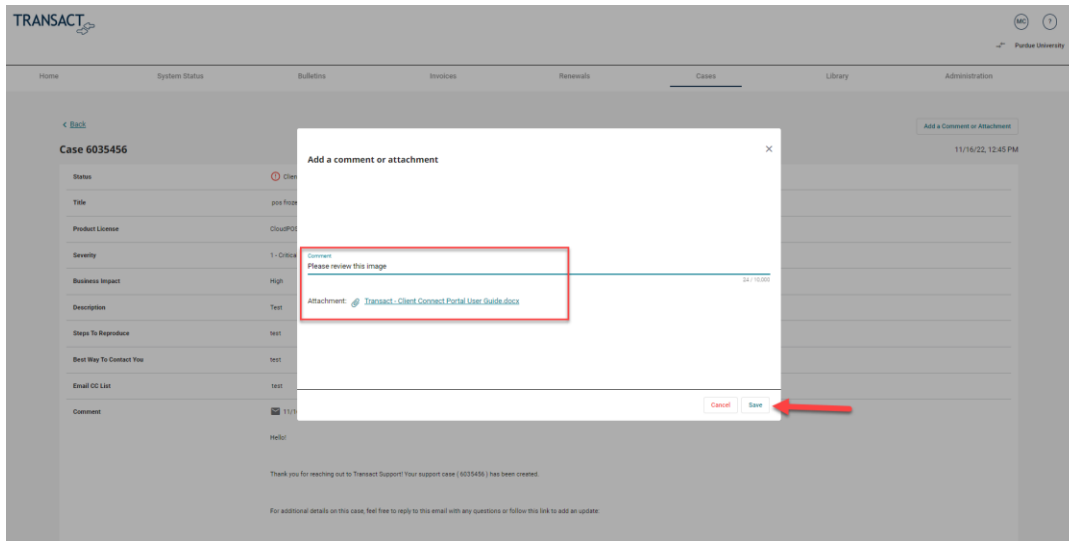
The screenshot shows the TRANSACT Client Portal home page. At the top, there is a navigation bar with links for Home, System Status, Bulletins, Invoices, Renewals, Cases, Library, and Administration. The 'Cases' link is active. Below the navigation bar, there is a 'Do you need help?' section with a 'Create Case' button. The main content area is titled 'Cases' and contains a table with one case. A red arrow points to the case number '6035456' in the table.

Created	Case Number	Title	Product License	Status	Opened By
Nov 16, 2022	6035456	pos frozen	CloudPOS	Support Response Required	Michele Carpenter

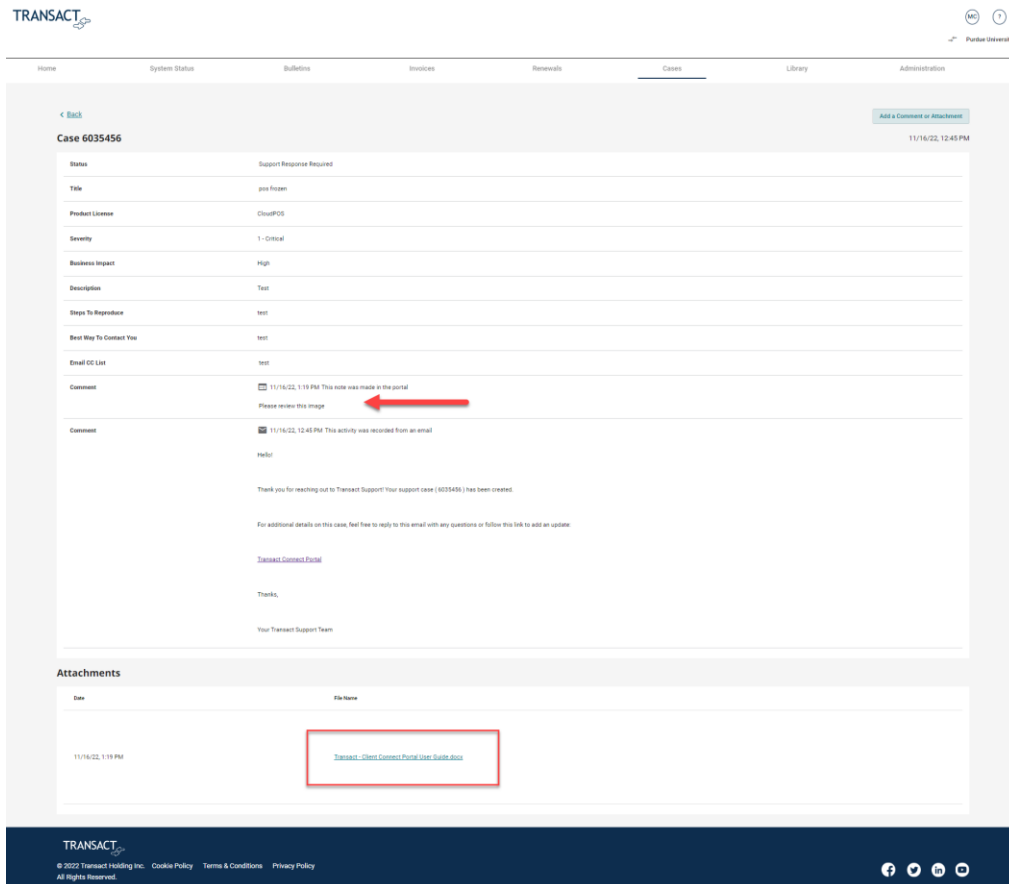
Click, Add a Comment or Attachment >

The screenshot shows the TRANSACT Client Portal case details page for Case 6035456. The page displays various case details such as Status (Client Response Required), Title (pos frozen), Product License (CloudPOS), Severity (1 - Critical), Business Impact (High), and Description (Test). A red arrow points to the 'Add a Comment or Attachment' button in the top right corner of the case details section.

Add Comment and/or file > Click, Save >



New comment and attachment now visible in case record >

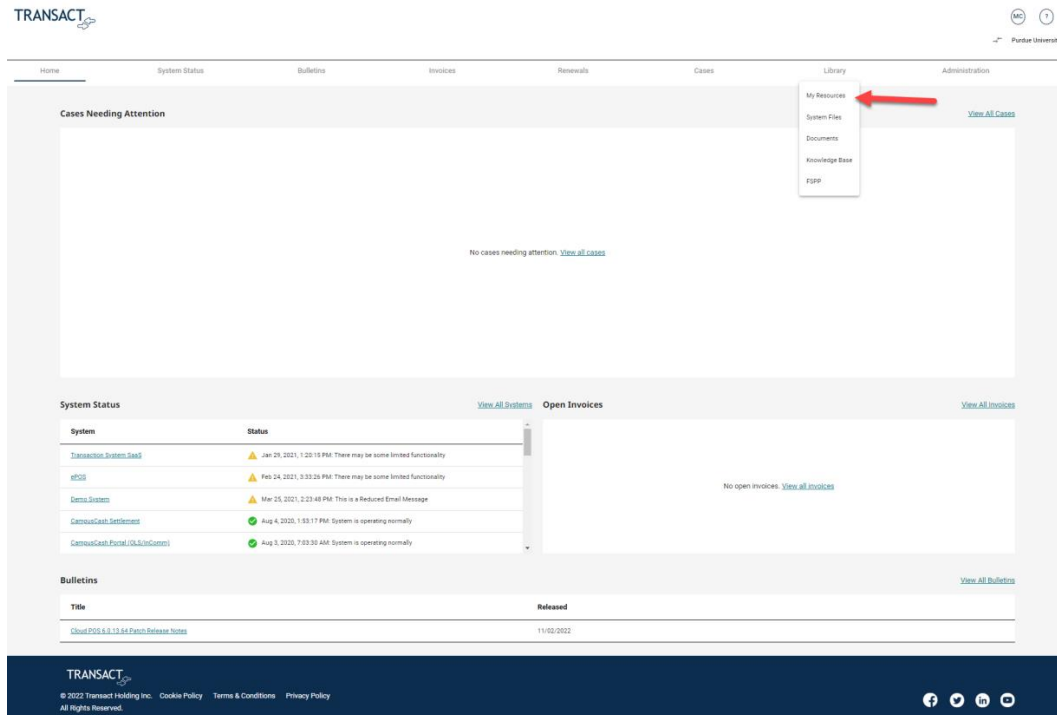


## Library

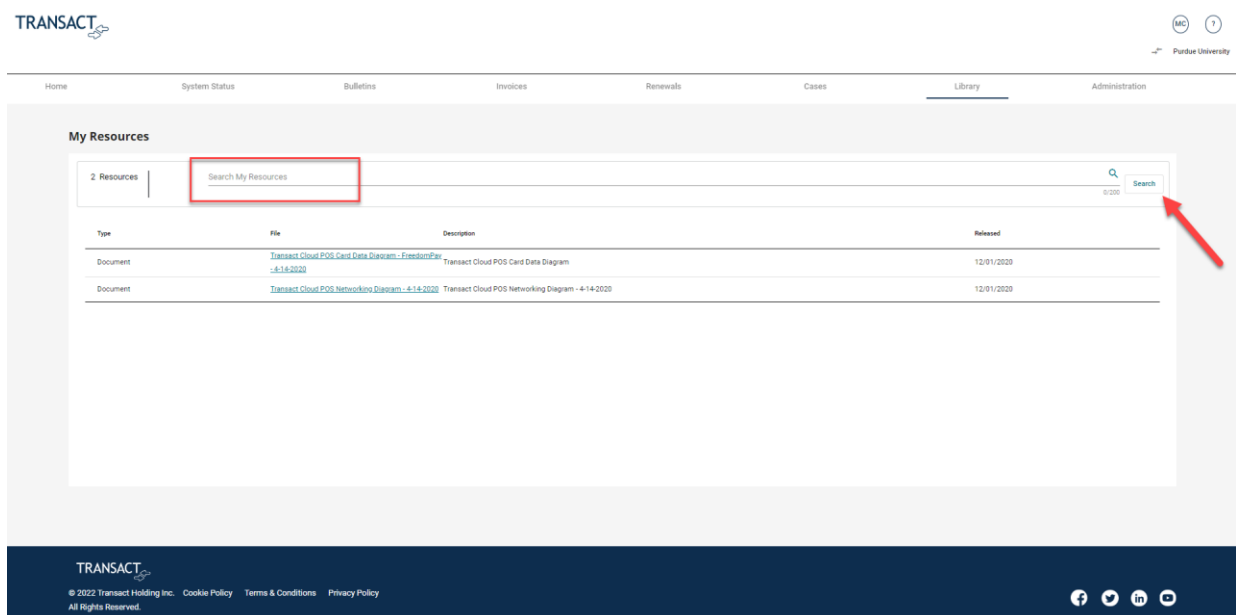
### My Resources

Items located in this area are specific to the account.

Click the Library tab and select, Account Resources >

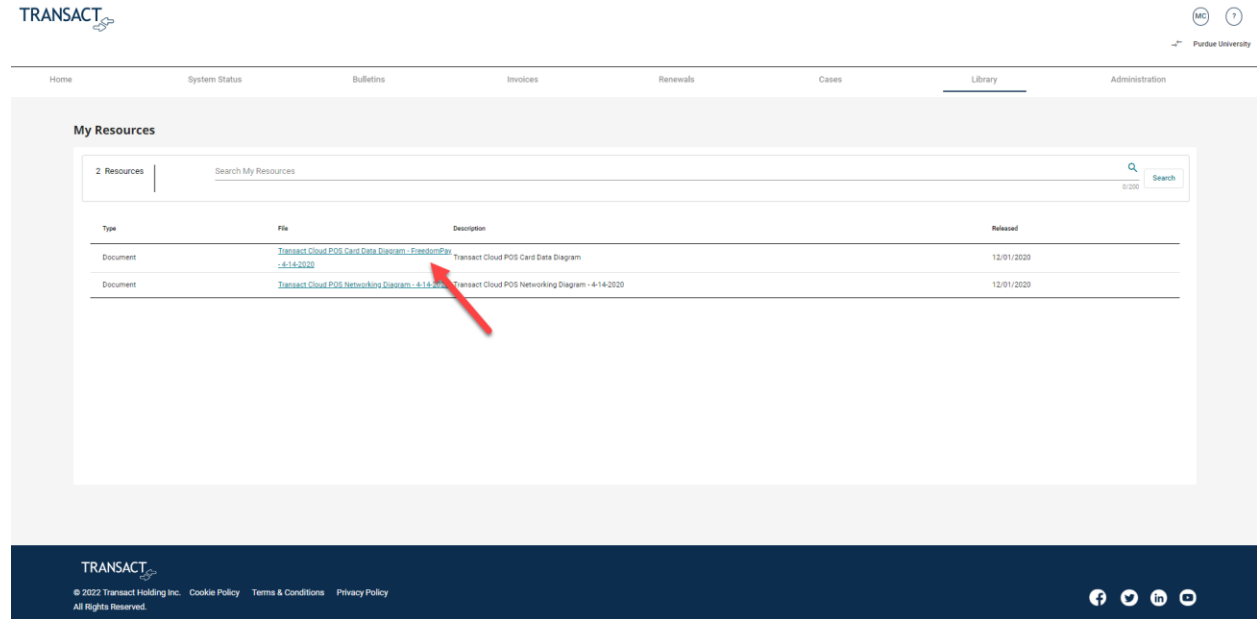


Search for requested content > Click, Search >

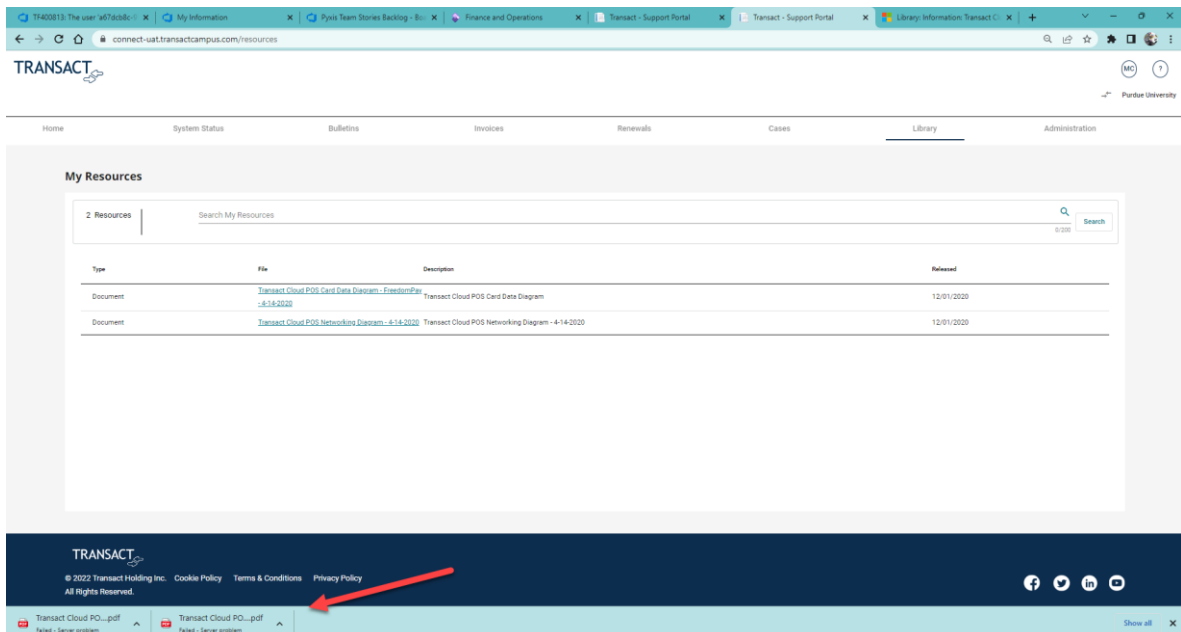




Click on file hyperlink to download file >



File downloaded.



## System Files

Click the Library tab and select, System Files >

TRANSACT Client Portal User Guide

Home System Status Bulletins Invoices Renewals Cases Library Administration

Cases Needing Attention

No cases needing attention. [View all cases](#)

System Status [View All Systems](#) Open Invoices [View All Invoices](#)

System	Status
<a href="#">Transaction System Seed</a>	Jan 29, 2021, 1:20:15 PM: There may be some limited functionality
<a href="#">ePOS</a>	Feb 24, 2021, 3:33:26 PM: There may be some limited functionality
<a href="#">Demo System</a>	Mar 25, 2021, 2:23:48 PM: This is a Reduced Email Message
<a href="#">CampusCash Settlement</a>	Aug 4, 2020, 1:53:17 PM: System is operating normally
<a href="#">CampusCash Portal (OLU/ncComm)</a>	Aug 3, 2020, 7:53:30 AM: System is operating normally

Bulletins [View All Bulletins](#)

Title	Released
<a href="#">Cloud POS 6.0.13.64 Patch Release Notes</a>	11/02/2022

TRANSACT  
© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
All Rights Reserved.

Type search name > Click, Search >

TRANSACT Client Portal User Guide

Home System Status Bulletins Invoices Renewals Cases Library Administration

System Files

0 System Files

Search System Files  
test

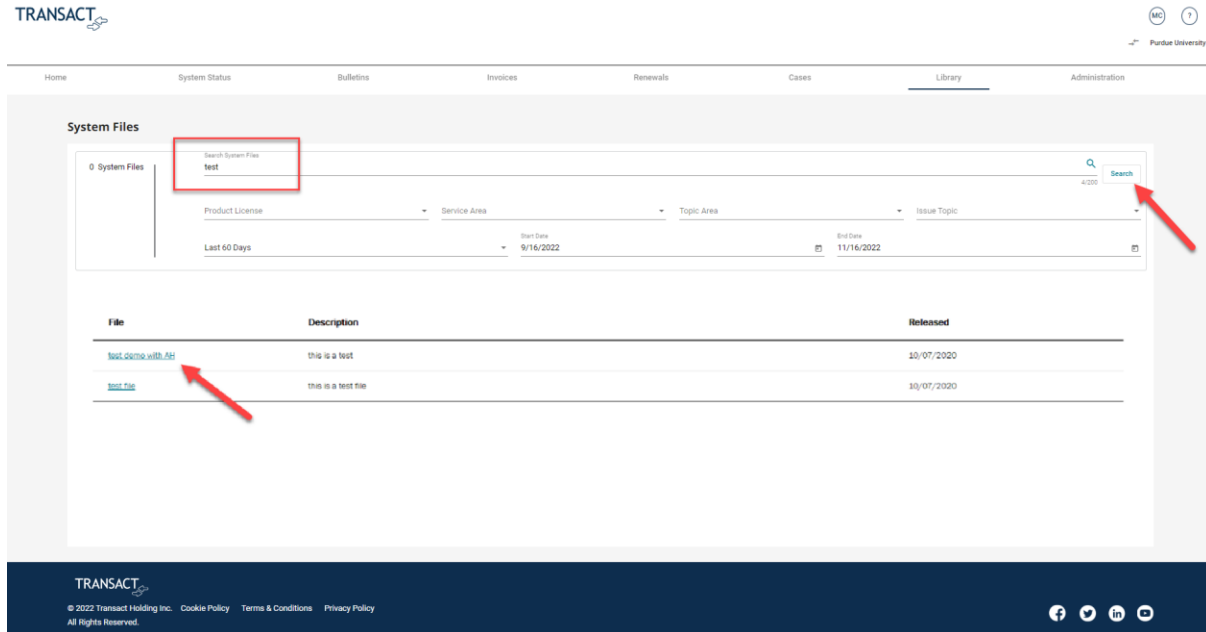
Product License Service Area Topic Area Issue Topic

Last 60 Days Start Date 9/16/2022 End Date 11/16/2022

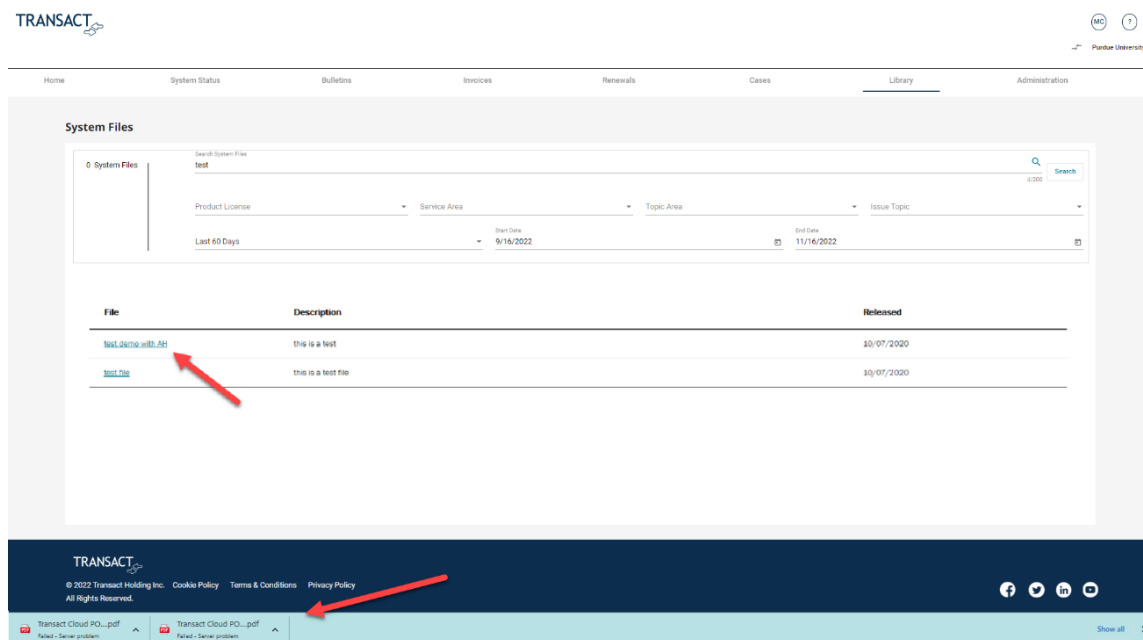
There is no data to display.

TRANSACT  
© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
All Rights Reserved.

Click hyperlink to download document >

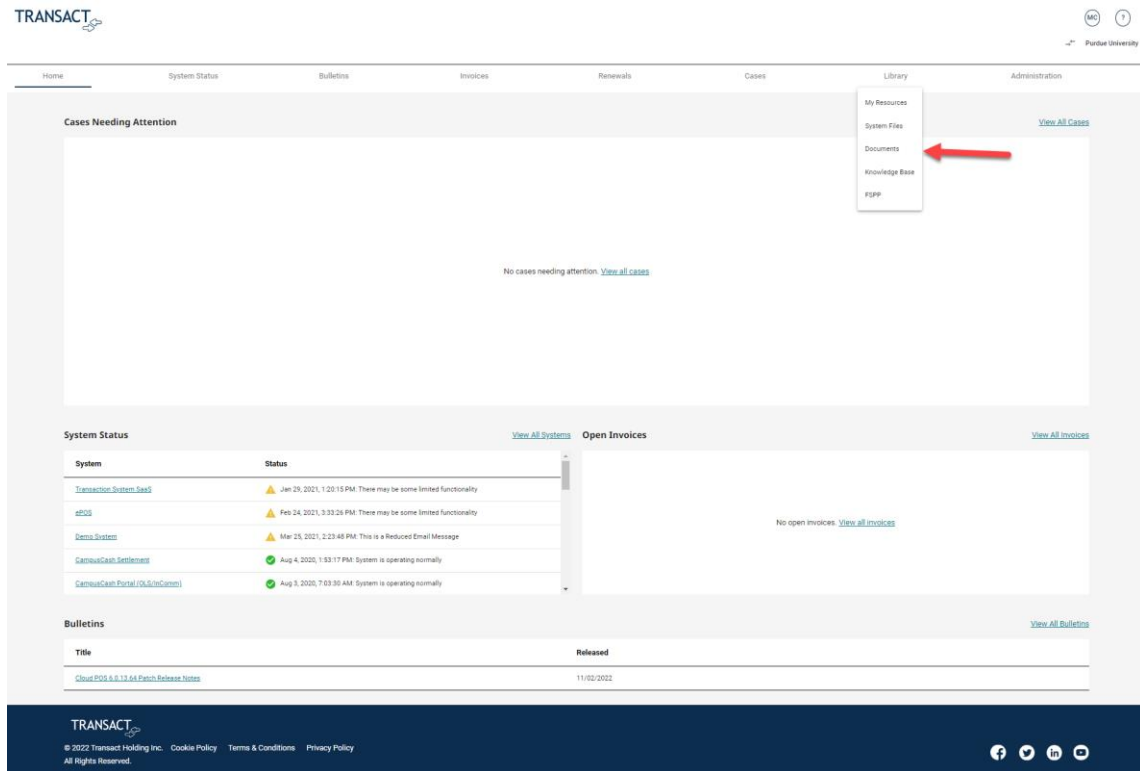


Document downloaded.

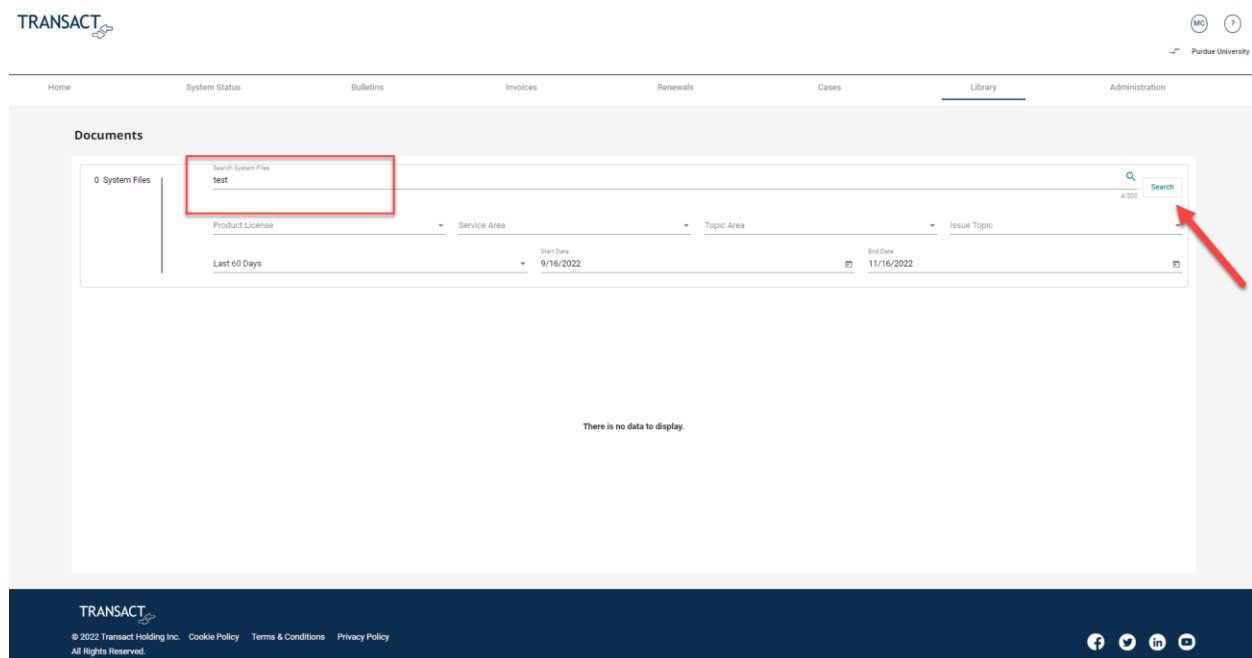


## Documents

Click the Library tab and select, Documents >



Add search content > Click, Search >



# TRANSACT Client Portal User Guide

Open document by clicking the hyperlink >

The screenshot shows the TRANSACT Client Portal interface. At the top, there is a navigation menu with links for Home, System Status, Bulletins, Invoices, Renewals, Cases, Library, and Administration. The 'Library' tab is selected. Below the navigation menu, there is a search bar and a filter section. The filter section includes dropdown menus for Product License, Service Area, Topic Area, and Issue Topic, as well as date pickers for Start Date (9/16/2022) and End Date (11/16/2022). Below the filter section, there is a table with three columns: File, Description, and Released. The table contains two rows of data:

File	Description	Released
<a href="#">test.docx.with.A4</a>	this is a test	10/07/2020
<a href="#">test file</a>	this is a test file	10/07/2020

A red arrow points to the 'test.docx.with.A4' document link. At the bottom of the page, there is a footer with the TRANSACT logo, copyright information, and social media icons.

Document downloaded >

The screenshot shows the same TRANSACT Client Portal interface as above. The table contains the same two rows of data:

File	Description	Released
<a href="#">test.docx.with.A4</a>	this is a test	10/07/2020
<a href="#">test file</a>	this is a test file	10/07/2020

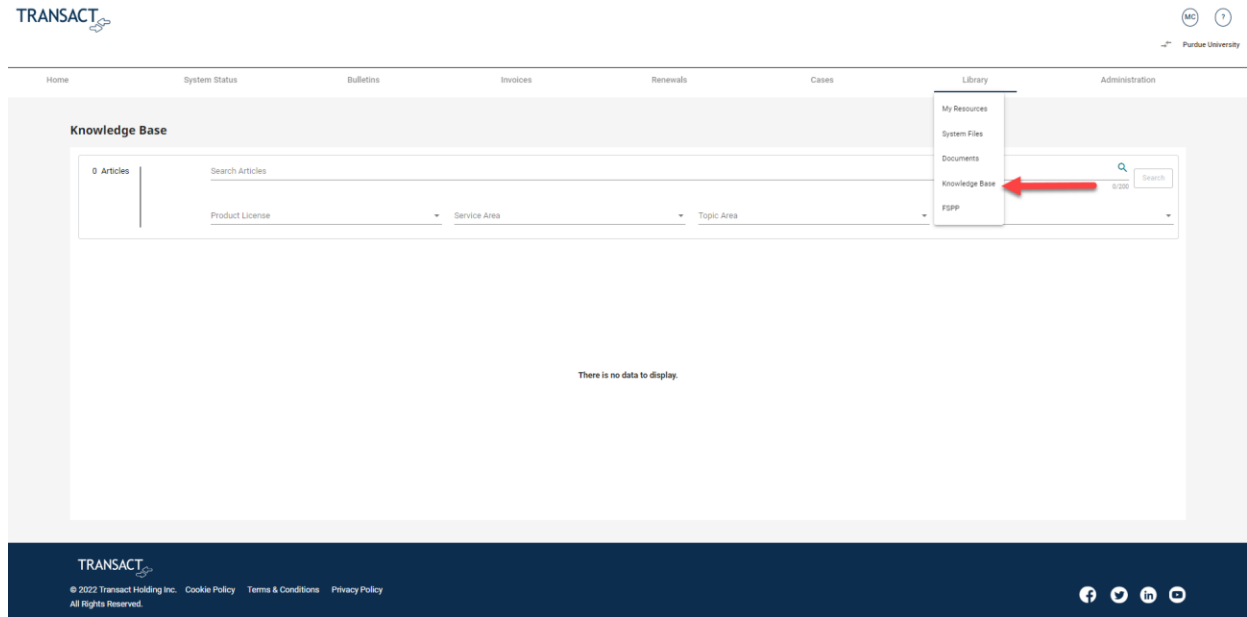
A red arrow points to the 'test.docx.with.A4' document link. Below the table, there is a notification bar with two notifications:

- Transact Cloud PO...pdf Failed - Server problem
- Transact Cloud PO...pdf Failed - Server problem

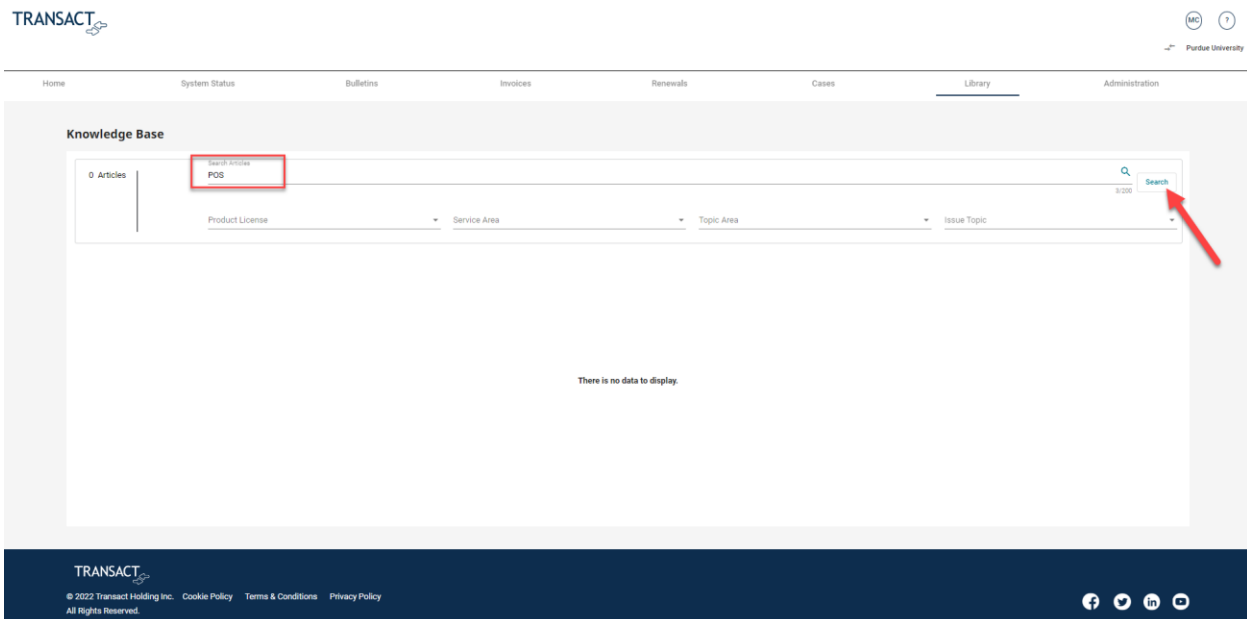
A red arrow points to the second notification. At the bottom of the page, there is a footer with the TRANSACT logo, copyright information, and social media icons.

## Knowledge Base Articles

Click the Library tab and select, Knowledge Base >



Type subject (required) > Filter categories (optional) > Click, Search >



Click on selected article >

**Knowledge Base**

52 Articles

Search Articles: POS

Product License Service Area Topic Area Issue Topic

Title	Description	Last Updated	Feedback
<a href="#">5.1.11 Register and Kiosk Release Notes</a>	5.1.11 Register and Kiosk Release Notes	10/29/20, 3:18 PM	0
<a href="#">Add a Convenience Fee for aAccount Deposit</a>		1/29/21, 7:15 PM	2
<a href="#">Add or Change a POS ID on a Register</a>	This article is about with adding a POS ID to a Register.	7/8/20, 10:44 AM	0
<a href="#">Blackboard Transaction System Tools and their Purpose</a>		9/24/20, 12:35 PM	0
<a href="#">Certificate Invalid Error Occurs on an NCR Register</a>	Certificate Invalid Error Occurs on an NCR Register	12/4/20, 12:54 PM	0
<a href="#">Change a Fuse in a LC3000</a>		12/3/20, 12:15 PM	0
<a href="#">Cloud POS Android Register 5.1.11 Release Notes</a>		10/29/20, 5:47 AM	0
<a href="#">Cloud POS Android Register 5.1.12 Release Notes</a>	Cloud POS Android Register 5.1.12 Release Notes	10/23/20, 3:39 PM	0
<a href="#">Cloud POS Android Register 5.1.12 Release Notes</a>	Cloud POS Android Register 5.1.12 Release Notes	10/12/20, 9:22 AM	0
<a href="#">Cloud POS Register Release Notes 5.1.8</a>		7/14/20, 10:47 AM	0

Items per page: 10 | 1 - 10 of 52 | < >

TRANSACT  
© 2022 Transact Holding Inc. Cookie Policy Terms & Conditions Privacy Policy  
All Rights Reserved.

Article accessed

**CloudPOS: Error Message - "One or few parameters are not defined"**

Last Updated: Jul 9, 2020, 1:06:15 PM

Description

Keywords: CloudPOS: Error Message - "One or few parameters are not defined" CloudPOS

Article

**CloudPOS: Error Message - "One or few parameters are not defined"**

When logging in to the CloudPOS Back Office web application, you may receive the following error message: "One or few parameters are not defined" This error occurs when the tenant name is missing from the URL, used to access the web application. It can be easily corrected by including the tenant name at the end of the URL.

Figure 1. Error message example

**Applicable Products**

The steps described in this article can be used with POS devices running any of the following:

- CloudPOS Back Office hosted web application

**Before You Begin**

You need only know your organization's tenant name. It is most often a shortened form of the organization's proper name, either a single word or an abbreviation. If you are uncertain, Transact support can provide it to you.

**Instructions**

To correct this error, add the tenant name to the end of the URL used to login. Two forms of the URL, are acceptable:

- <https://go.transactamp.com/argame>
- <https://go.transactamp.com/?tenant=argame>

Replace **argame** in the examples above with your own organization's tenant name. The shortened form shown in the first example will automatically be expanded to add "tenant=" as shown in the second example, but you may save either to your favorites/bookmarks.

**Verifying the Solution**

After completing the steps above, try logging in again with the full URL for your tenant. If you continue to receive this error or experience other issues logging in, please review the steps above and contact Transact support for assistance as needed.

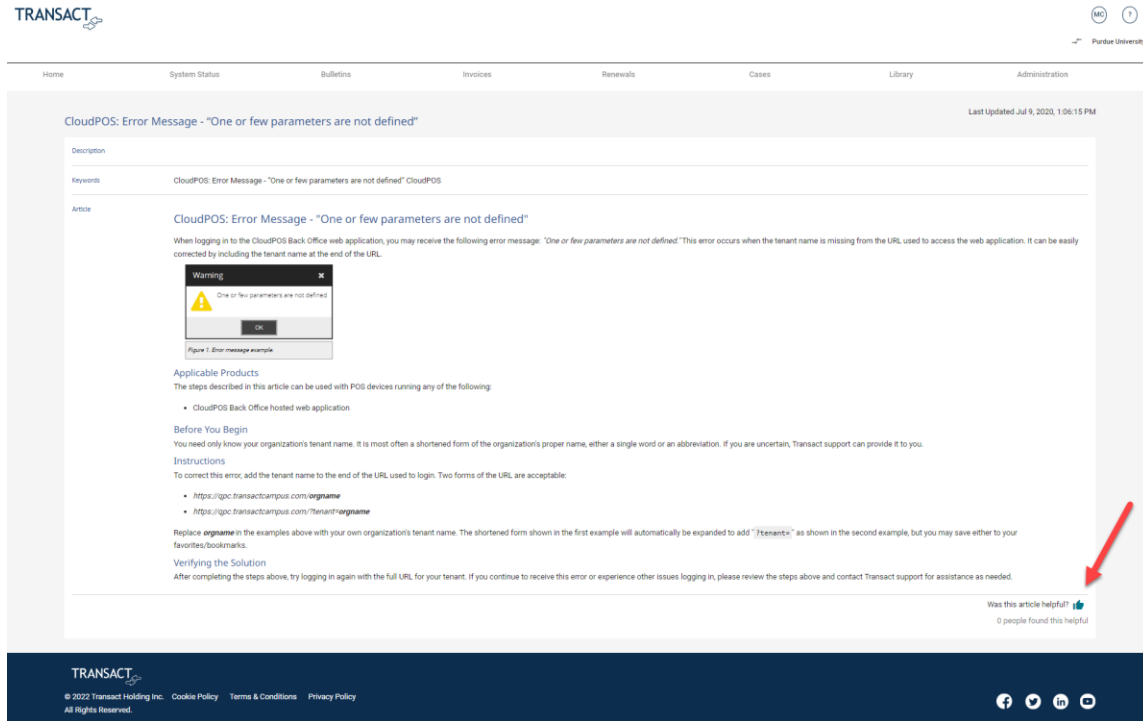
Was this article helpful? 0 people found this helpful

TRANSACT  
© 2022 Transact Holding Inc. Cookie Policy Terms & Conditions Privacy Policy  
All Rights Reserved.



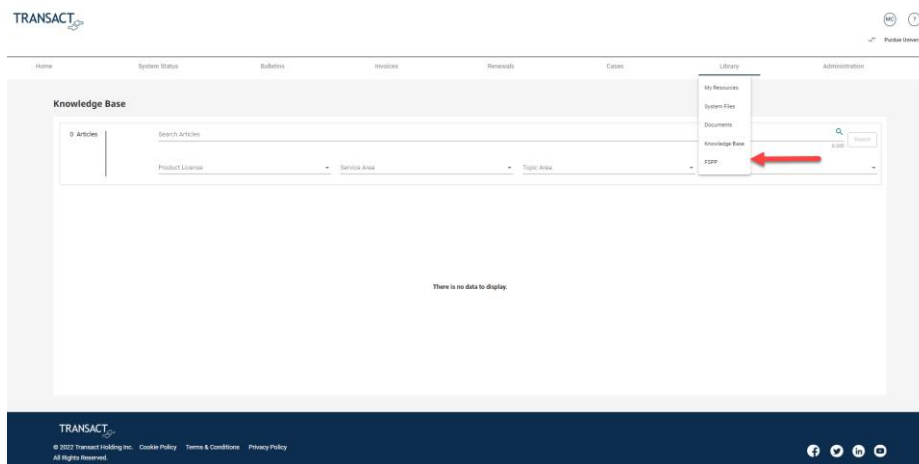
## Knowledge Base Feedback

After reviewing a KB article if you found it helpful, please click, the thumbs up icon >

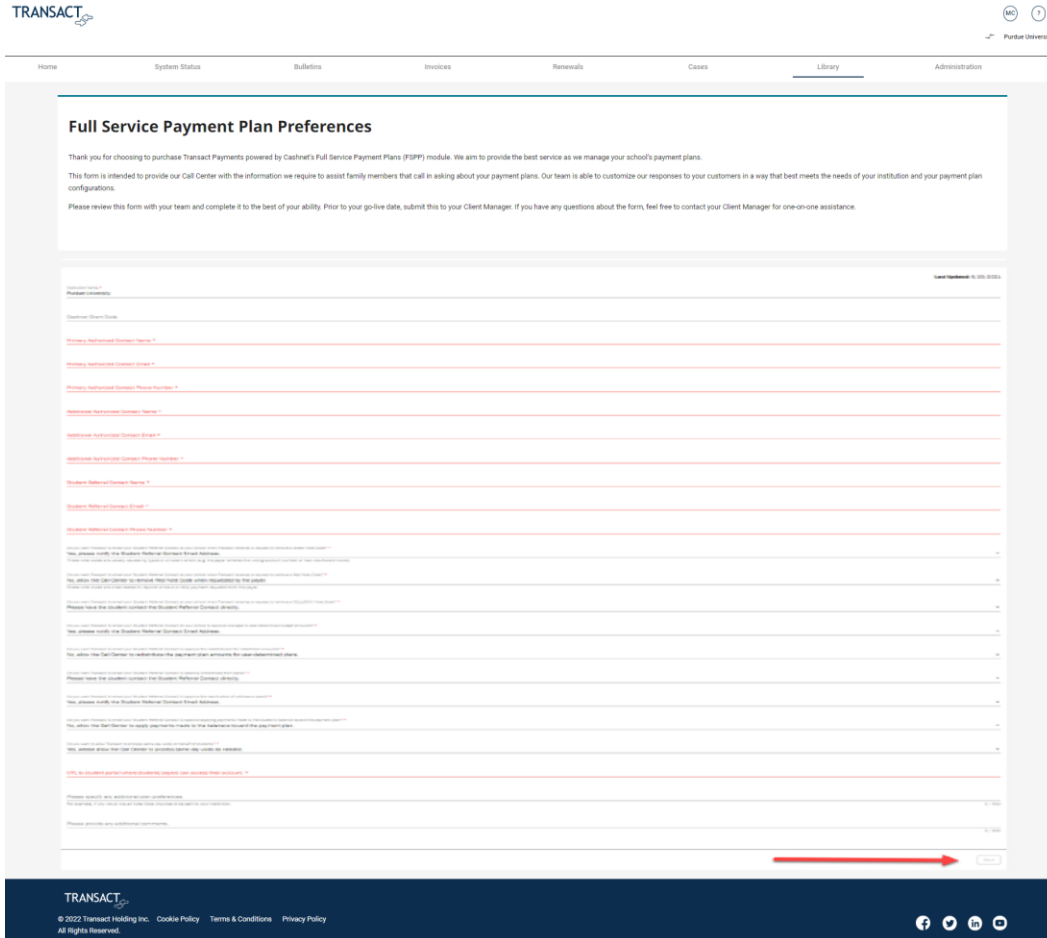



## FSPF

These abilities are permission based specific to the Admin – FSPF and User – FSPF roles.



The Admin – FSPP role allows the users to add specific Full Service Payment Plan Preferences for their account. Once all field are updated Click, Save.



**TRANSACT**  Purdue University

Home System Status Bulletins Invoices Renewals Cases Library Administration

### Full Service Payment Plan Preferences

Thank you for choosing to purchase Transact Payments powered by Cashnet's Full Service Payment Plans (FSPP) module. We aim to provide the best service as we manage your school's payment plans. This form is intended to provide our Call Center with the information we require to assist family members that call in asking about your payment plans. Our team is able to customize our responses to your customers in a way that best meets the needs of your institution and your payment plan configurations.

Please review this form with your team and complete it to the best of your ability. Prior to your go-live date, submit this to your Client Manager. If you have any questions about the form, feel free to contact your Client Manager for one-on-one assistance.

Last Updated: 4/20/2022

**Primary Authorized Contact Name \***

**Primary Authorized Contact Phone Number \***

**Student Referral Contact Name \***

**Student Referral Contact Phone Number \***

**Save**

© 2022 Transact Holding Inc. Cookie Policy Terms & Conditions Privacy Policy

Full-Service Payment Plan Preferences that have been added and saved by the Admin can be viewed (read-only) by users with the User – FSPP role.

TRANSACT MC ?  
Purdue University

---

Home System Status Bulletins Invoices Renewals Cases Library Administration

---

### Full Service Payment Plan Preferences

Thank you for choosing to purchase Transact Payments powered by Cashnet's Full Service Payment Plans (FSPP) module. We aim to provide the best service as we manage your school's payment plans. This form is intended to provide our Call Center with the information we require to assist family members that call in asking about your payment plans. Our team is able to customize our responses to your customers in a way that best meets the needs of your institution and your payment plan configurations.

Please review this form with your team and complete it to the best of your ability. Prior to your go-live date, submit this to your Client Manager. If you have any questions about the form, feel free to contact your Client Manager for one-on-one assistance.

**⚠ If changes are needed, please contact your FSPP administrator.** Last Updated: 6/25/2021

Institution Name \*  
**Purdue University**

Cashnet Client Code  
**12321123**

Primary Authorized Contact Name \*  
**Michelle Carpenter**

Primary Authorized Contact Email \*  
**carpentierm23@msn.com**

Primary Authorized Contact Phone Number \*  
**4803308099**

Additional Authorized Contact Name \*  
**Cole Moran**

Additional Authorized Contact Email \*  
**test@test.com**

Additional Authorized Contact Phone Number \*  
**4805555555**

Student Referral Contact Name \*  
**Don Draper**

Student Referral Contact Email \*  
**Donnie@test.com**

Student Referral Contact Phone Number \*  
**5555555555**

Do you want Transact to email your Student Referral Contact at your school when Transact receives a request to remove a Green Note Code?  
**Yes, please notify the Student Referral Contact Email Address.**

These note codes are usually caused by typos or innocent errors (e.g. the payer entered the wrong account number or had insufficient funds)

Do you want Transact to email your Student Referral Contact at your school when Transact receives a request to remove a Red Note Code?  
**No, allow the Call Center to remove Red Note Code when requested by the payer.**

These note codes are ones related to reports of fraud or stop payment requests from the payer.

---

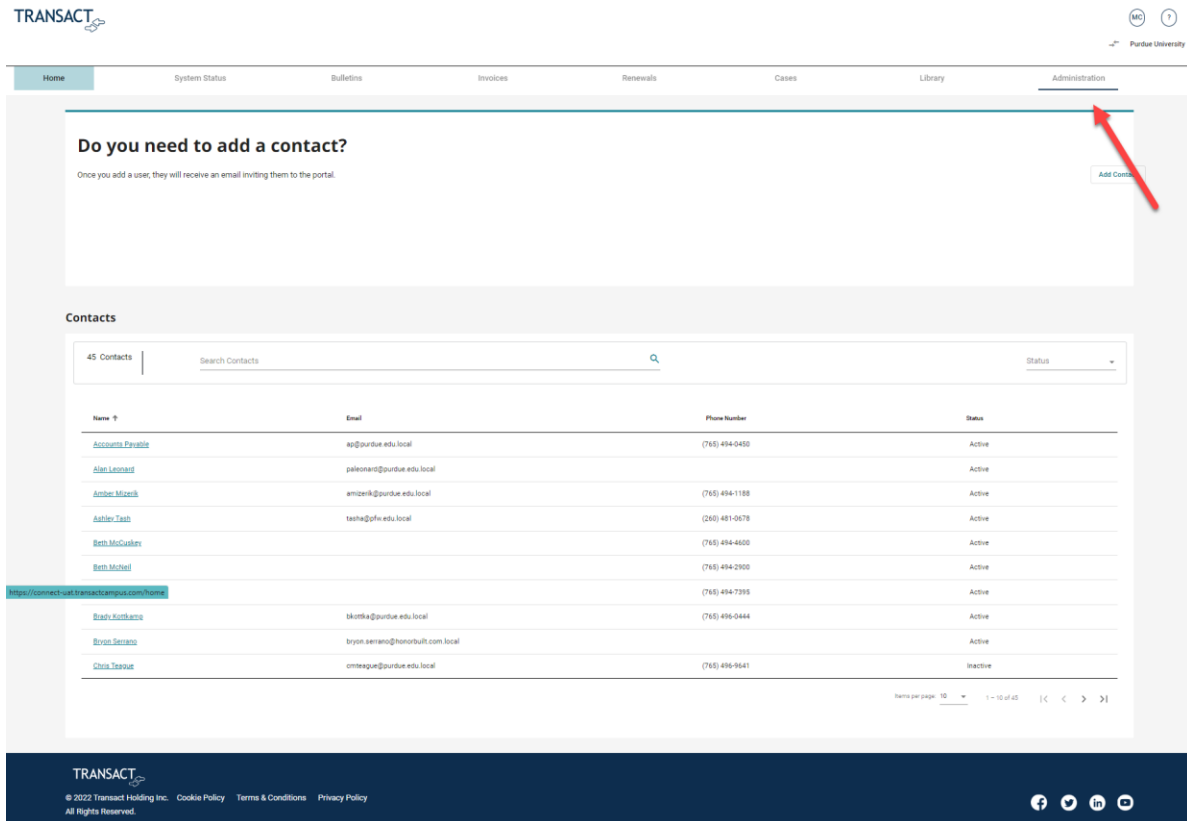
TRANSACT  
 © 2021 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
 All Rights Reserved. f t in v

## Administration

These abilities are permission based specific to the admin role.

### Add New User

Click, Administration >



**Do you need to add a contact?**  
Once you add a user, they will receive an email inviting them to the portal.


[Add Contact](#)

#### Contacts

45 Contacts | Search Contacts | Status

Name	Email	Phone Number	Status
<a href="#">Accounts Payable</a>	ap@purdue.edu.local	(765) 494-0430	Active
<a href="#">Albert Leonard</a>	paltonard@purdue.edu.local		Active
<a href="#">Amber Mizell</a>	amizell@purdue.edu.local	(765) 494-1188	Active
<a href="#">Ashley Tash</a>	tasha@pfe.edu.local	(248) 481-0678	Active
<a href="#">Beth McCuskey</a>		(765) 494-4600	Active
<a href="#">Beth Mitchell</a>		(765) 494-2900	Active
<a href="#">Brady Kunkewicz</a>	bkunkew@purdue.edu.local	(765) 494-7395	Active
<a href="#">Bryon Serrano</a>	bryon.serrano@honorbuilt.com.local	(765) 495-0444	Active
<a href="#">Chris Trappie</a>	cmtrapp@purdue.edu.local	(765) 495-9641	Inactive

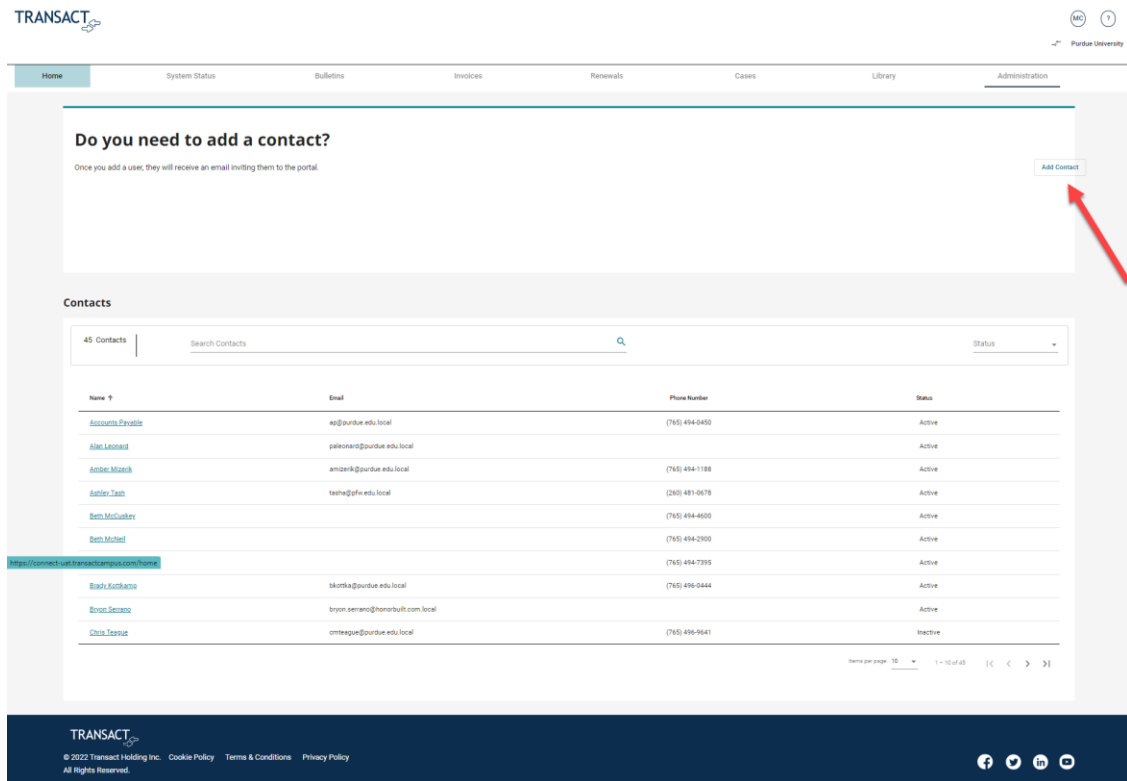
Items per page: 10 | 1 - 10 of 45 | < > >>

TRANSACT   
© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
All Rights Reserved.

[Facebook](#) [Twitter](#) [LinkedIn](#) [YouTube](#)

# TRANSACT Client Portal User Guide

Click, Add Contact >



**Do you need to add a contact?**  
Once you add a user, they will receive an email inviting them to the portal.

[Add Contact](#)

**Contacts**

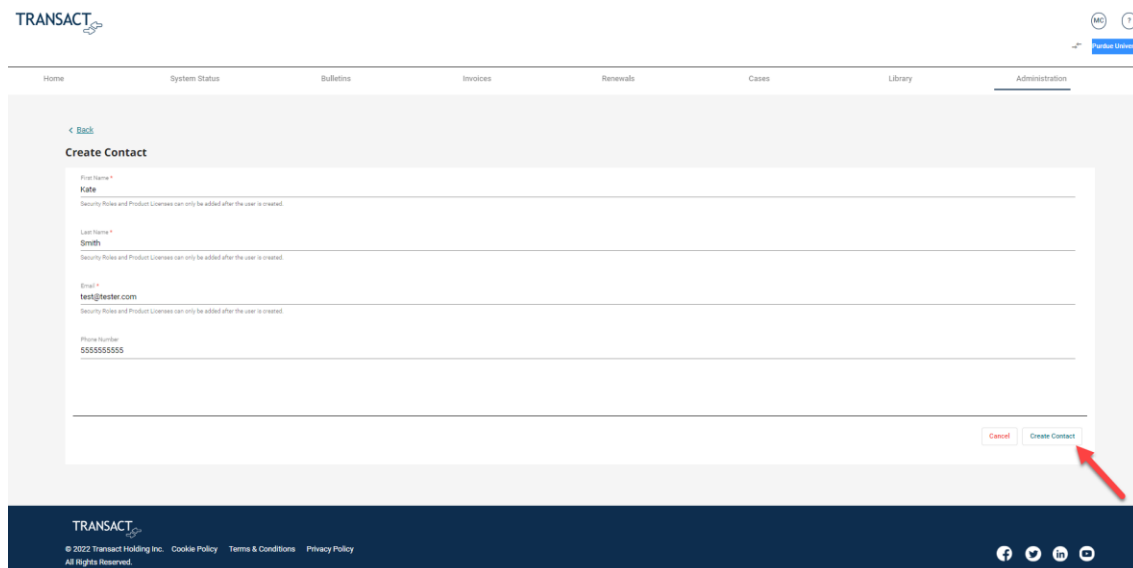
45 Contacts | Search Contacts | Status

Name ↑	Email	Phone Number	Status
<a href="#">Accounts Payable</a>	ap@purdue.edu.local	(765) 494-0450	Active
<a href="#">Alan Leonard</a>	palmonar@purdue.edu.local		Active
<a href="#">Antler, Mark</a>	amark@purdue.edu.local	(765) 494-1188	Active
<a href="#">Antler, Tom</a>	taah@pfe.edu.local	(260) 481-0678	Active
<a href="#">Ben McQuisley</a>		(765) 494-4600	Active
<a href="#">Ben Michel</a>		(765) 494-2900	Active
<a href="#">https://connect.usf.transactmg.com/home</a>		(765) 494-7395	Active
<a href="#">Brad Kortbano</a>	bkortba@purdue.edu.local	(765) 496-0444	Active
<a href="#">Bryon Serano</a>	bryon.serano@honorbuilt.com.local		Active
<a href="#">Chris Tarnoff</a>	omeaque@purdue.edu.local	(765) 496-9641	Inactive

Items per page: 10 | 1 - 10 of 45 | < > >>

TRANSACT  
© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
All Rights Reserved.

Complete required fields > Click, Create >



[Back](#)

**Create Contact**

First Name \*  
Katie  
Security Roles and Product Licenses can only be added after the user is created.

Last Name \*  
Smith  
Security Roles and Product Licenses can only be added after the user is created.

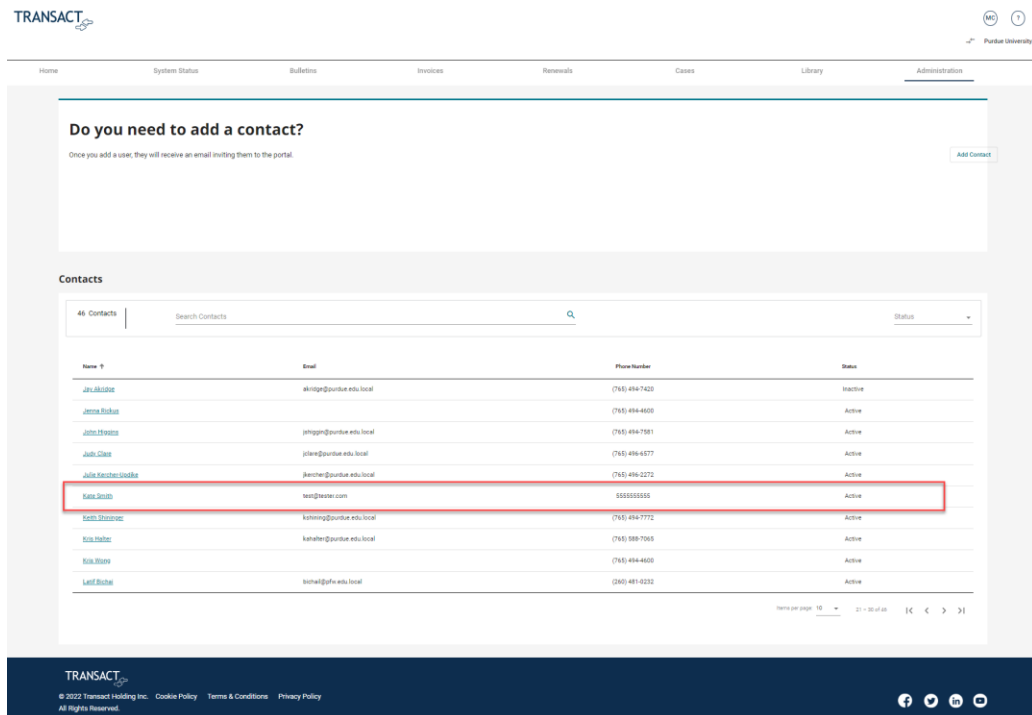
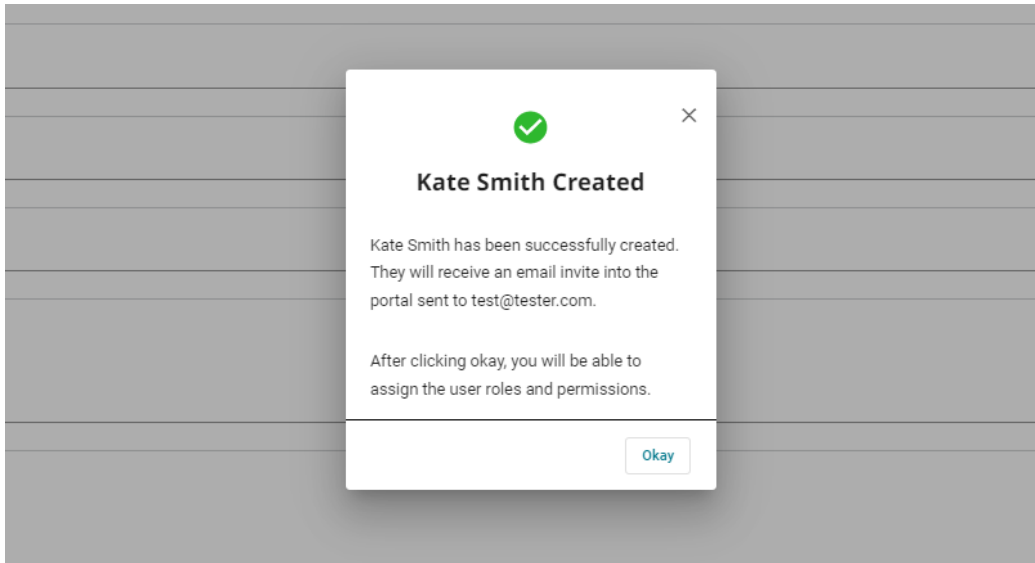
Email \*  
test@tester.com  
Security Roles and Product Licenses can only be added after the user is created.

Phone Number  
5555555555

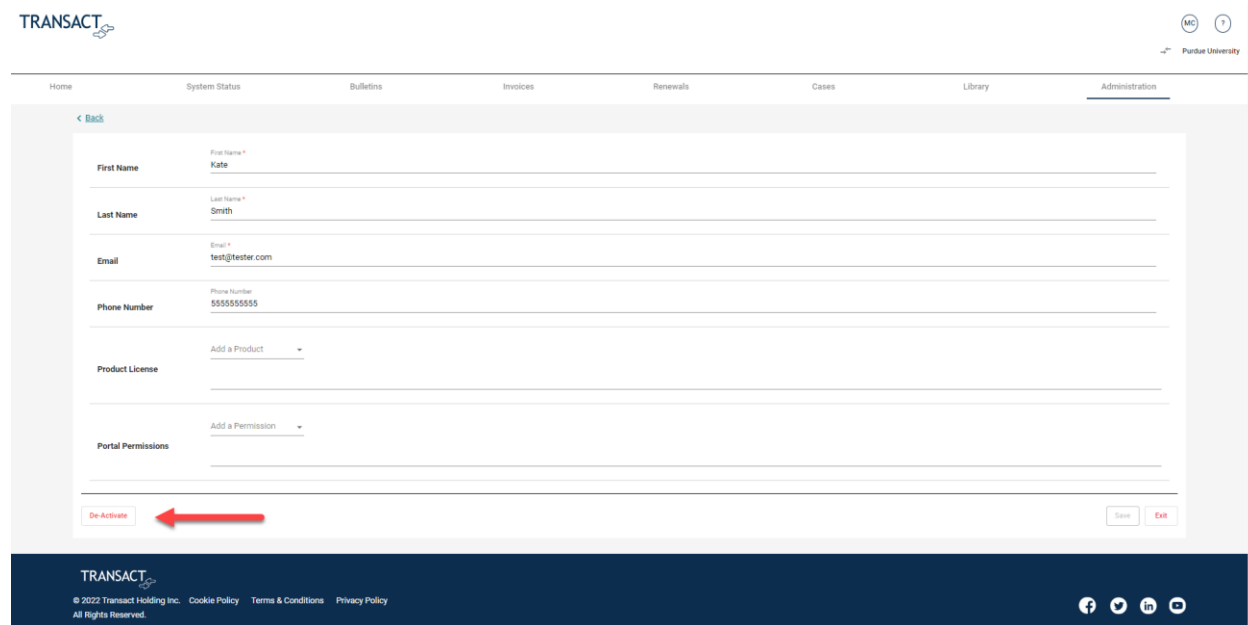
[Cancel](#) [Create Contact](#)

TRANSACT  
© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
All Rights Reserved.

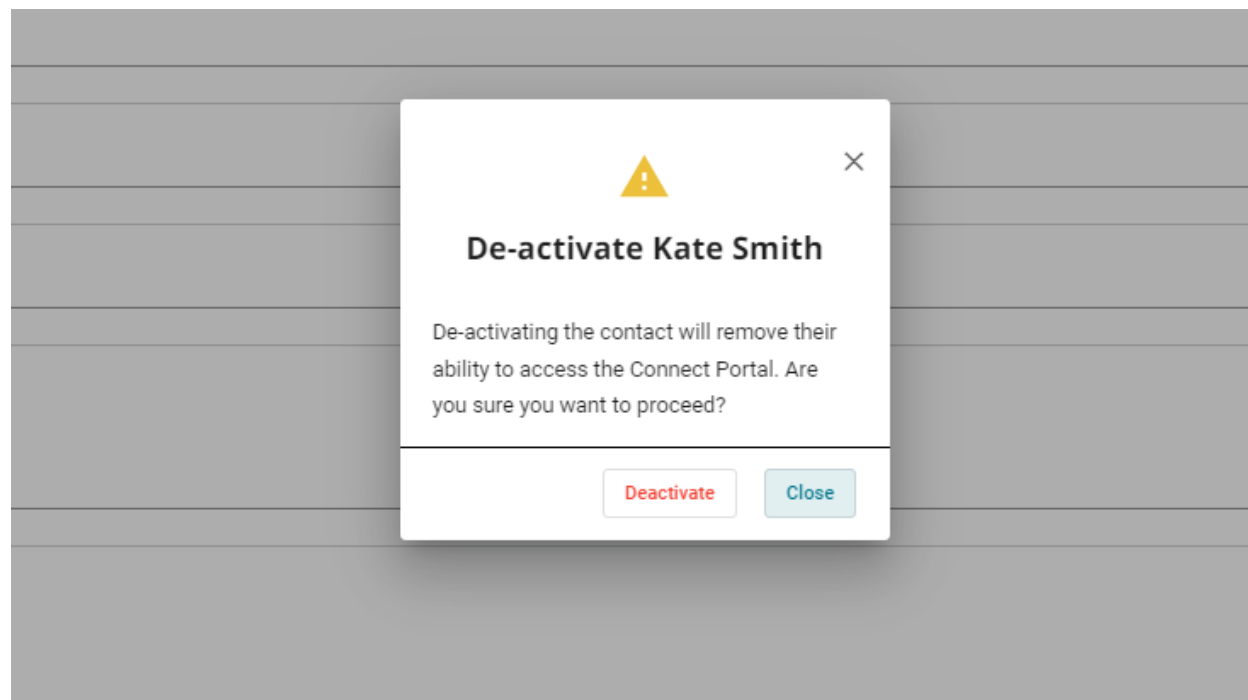
New user created > Click, Okay >



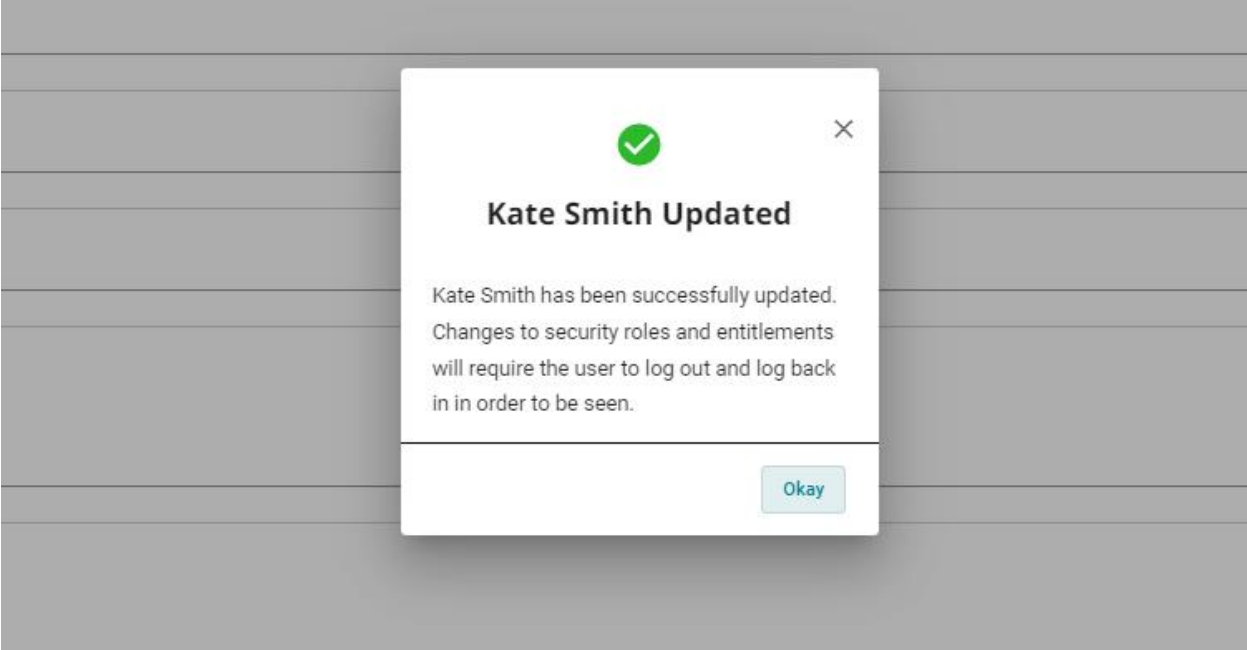
Deactivate User  
Click, Deactivate >



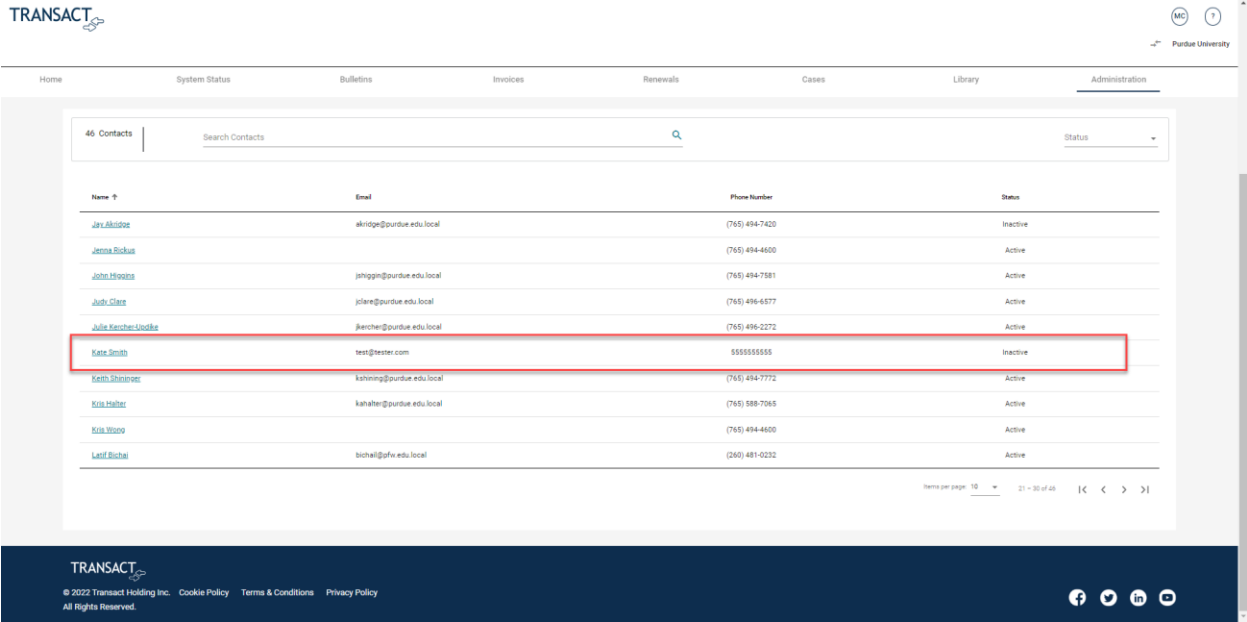
Click, Deactivate, to confirm >





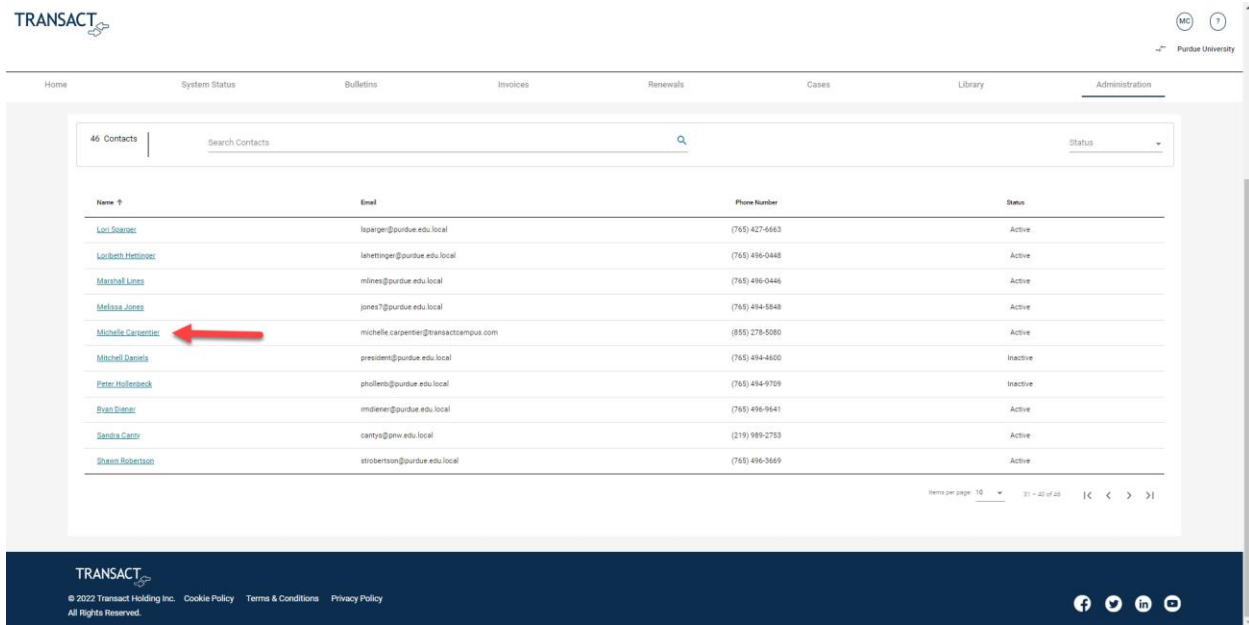



User now inactive.



Add a Product License

Click Username >




TRANSACT  MC ?  
Purdue University





Home System Status Bulletins Invoices Renewals Cases Library Administration

46 Contacts  Status ▾

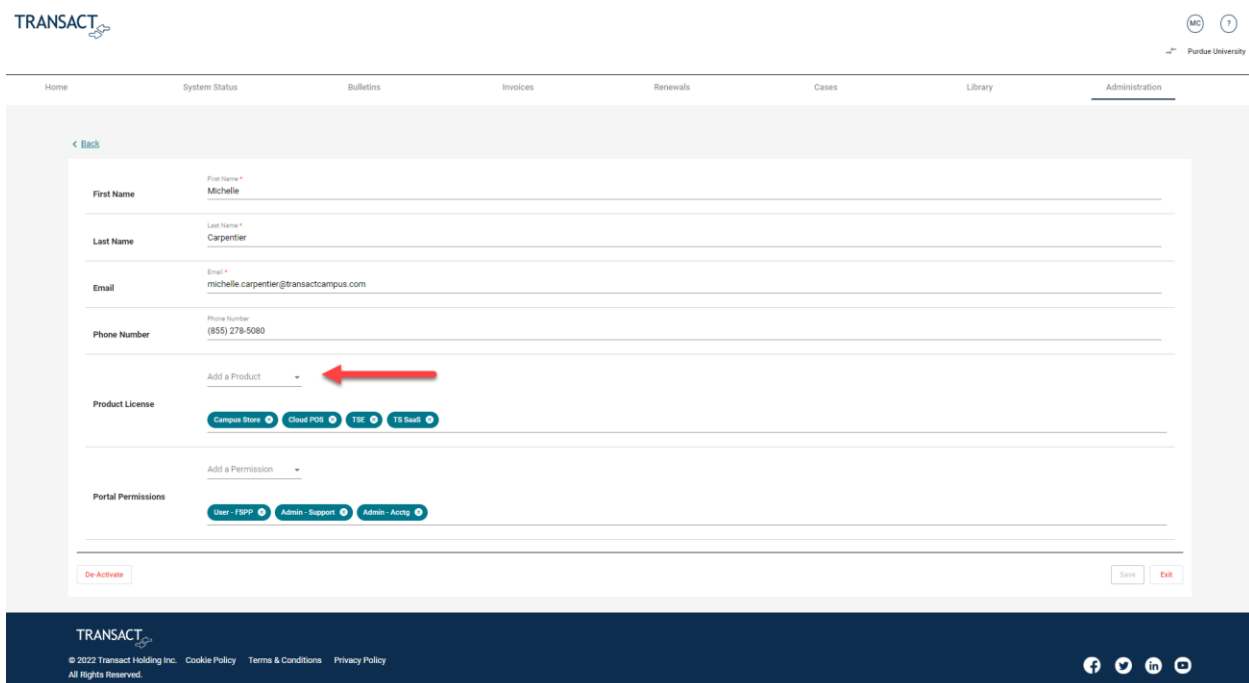
Name ↑	Email	Phone Number	Status
<a href="#">Leon Sauer</a>	lsauer@purdue.edu.local	(765) 427-6663	Active
<a href="#">LoisBeth Heston</a>	lhettin@purdue.edu.local	(765) 496-0448	Active
<a href="#">Marshall Limes</a>	mlimes@purdue.edu.local	(765) 496-0446	Active
<a href="#">Melissa Jones</a>	jones17@purdue.edu.local	(765) 494-5848	Active
<a href="#">Michelle Carpenter</a>	michelle.carpenter@transactcampus.com	(855) 278-5080	Active
<a href="#">Mitchell Davis</a>	president@purdue.edu.local	(765) 494-4000	Inactive
<a href="#">Peter Hollebeck</a>	phollen@purdue.edu.local	(765) 494-9709	Inactive
<a href="#">Ryan Stiner</a>	rstiner@purdue.edu.local	(765) 496-9641	Active
<a href="#">Sandra Caray</a>	caray@pmw.edu.local	(219) 989-2703	Active
<a href="#">Shawn Robertson</a>	strobertson@purdue.edu.local	(765) 496-5669	Active


Items per page: 10 ▾ 31 - 42 of 46 | < > >>

TRANSACT  MC ?  
Purdue University

© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
   

Click, Add a new role dropdown next to Product License >



TRANSACT  MC ?  
Purdue University

Home System Status Bulletins Invoices Renewals Cases Library Administration

< Back

First Name

Last Name

Email


Phone Number





Add a Product  ▾

Product License

Add a Permission

Portal Permissions

TRANSACT  MC ?  
Purdue University

© 2022 Transact Holding Inc. [Cookie Policy](#) [Terms & Conditions](#) [Privacy Policy](#)  
   

# TRANSACT Client Portal User Guide

Click on selected role >

The screenshot shows the user profile page for Michelle Carpentier. The fields are filled with: First Name: Michelle, Last Name: Carpentier, Email: michelle.carpentier@transactcampus.com, and Phone Number: (855) 278-5080. The Product License dropdown menu is open, showing options: None, Campus Cash, Payments (selected), and Unsubscribed. Below the dropdown, there are buttons for 'POS', 'TIC', and 'TS Seed'. Portal Permissions include 'User - FSPP', 'Admin - Support', and 'Admin - Accts'. At the bottom right, there are 'Save' and 'Exit' buttons.

Click, Save.

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Save' button at the bottom right of the form.

## Remove Product License

Click username >

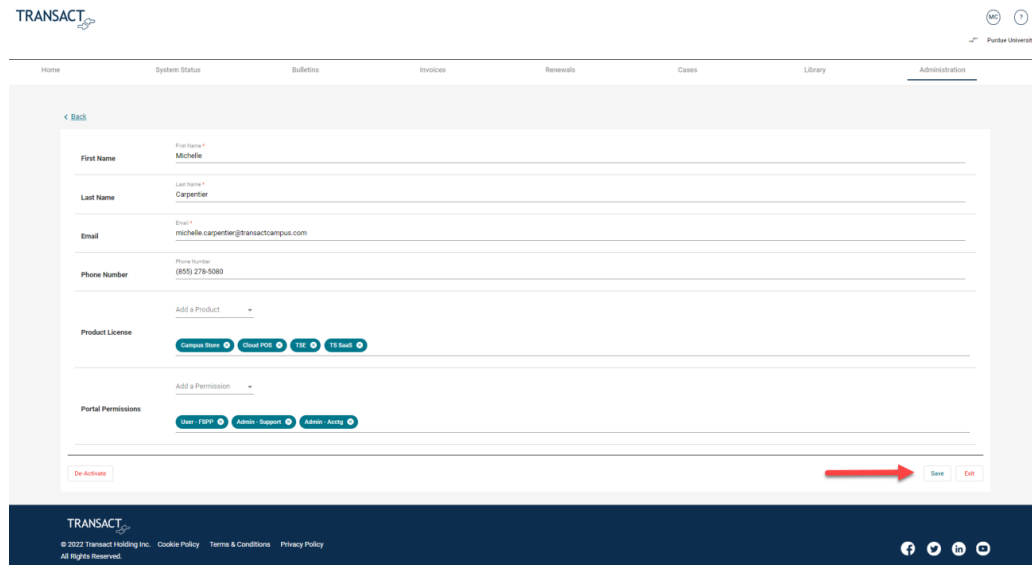
The screenshot shows the 'Administration' section of the TRANSACT Client Portal. At the top, there is a navigation bar with links for Home, System Status, Bulletins, Invoices, Renewals, Cases, Library, and Administration. Below this is a search bar for contacts and a table listing 46 contacts. The table has columns for Name, Email, Phone Number, and Status. A red arrow points to the contact 'Michelle Carpenter'.

Name	Email	Phone Number	Status
<a href="#">Leon Suarez</a>	lsuarez@purdue.edu.local	(765) 427-6663	Active
<a href="#">Loisbeth Hestonov</a>	lhettov@purdue.edu.local	(765) 496-0448	Active
<a href="#">Marshall Limes</a>	mlimes@purdue.edu.local	(765) 496-0446	Active
<a href="#">Melissa Jones</a>	jones17@purdue.edu.local	(765) 494-5848	Active
<a href="#">Michelle Carpenter</a>	michelle.carpenter@transactcampus.com	(855) 278-5080	Active
<a href="#">Mitchell Dwanis</a>	president@purdue.edu.local	(765) 494-4400	Inactive
<a href="#">Peter Hoffbeck</a>	phoffeb@purdue.edu.local	(765) 494-9709	Inactive
<a href="#">Bryan Stiner</a>	bstiner@purdue.edu.local	(765) 496-9641	Active
<a href="#">Sandra Caray</a>	caray@pmw.edu.local	(219) 989-2793	Active
<a href="#">Shawn Robertson</a>	strobertson@purdue.edu.local	(765) 496-5669	Active

Click, X on selected role >

The screenshot shows the user profile page for 'Michelle Carpenter' in the TRANSACT Client Portal. The page has a 'Back' link and fields for First Name, Last Name, Email, and Phone Number. Below these fields are sections for 'Product License' and 'Portal Permissions'. The 'Product License' section shows a list of roles: Campus Store, Cloud POS, TIE, TB Staff, and Payments. A red arrow points to the 'Payments' role. The 'Portal Permissions' section shows roles: User - FSPP, Admin - Support, and Admin - Acctg.

Click, Save



## Add Portal Permissions

Users can assign roles that are beneath them, or the same as, in the role hierarchy.

Admin – FSPP can assign:

- User – FSPP (Read-only view of Full-Service Payment Plan Preferences)
- Admin – FSPP (Ability to update Full-Service Payment Plan Preferences)

Admin - Acctg can assign:

- User-Acctg (Access: Home/System Status)
- Admin – Acctg (Access: Home/System Status/Admin)

Admin - Support can assign:

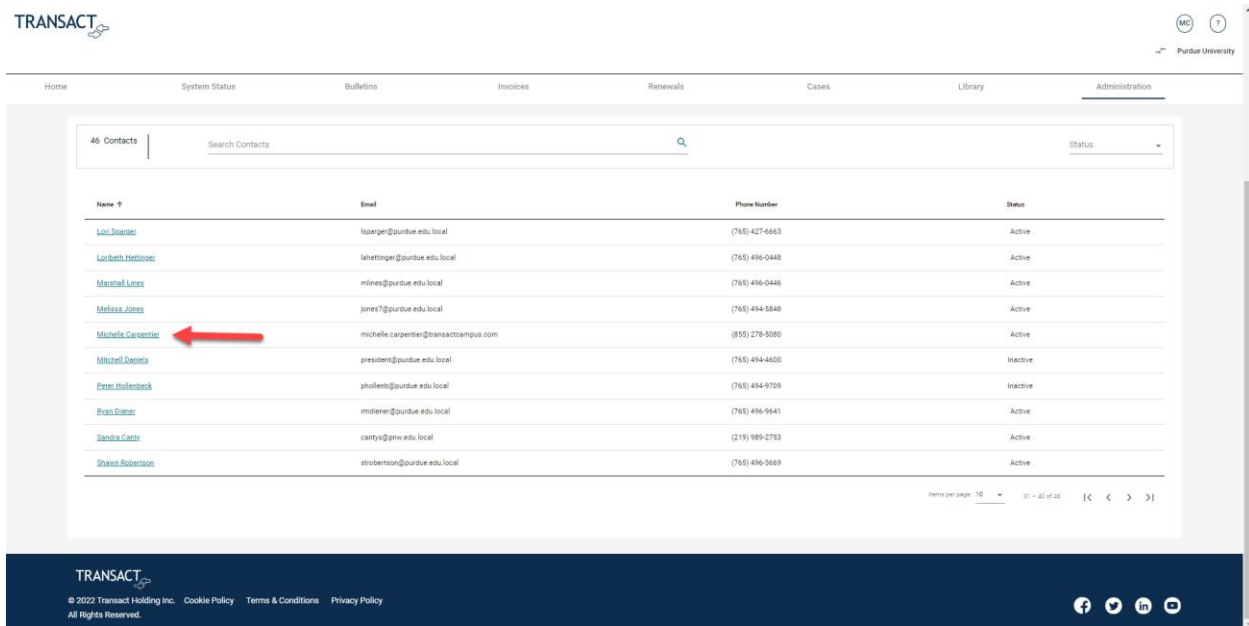
- User – Support (Access: Home/ System Status /Cases/Downloads/Knowledge Base)
- Admin – Support (Access: Home/ System Status /Cases/Downloads/ Knowledge Base /Admin)

Admin - Global can assign:

- User-Acctg (Access: Home/System Status)
- Admin – Acctg (Access: Home/System Status/Admin)
- User – Support (Access: Home/ System Status /Cases/Downloads/Knowledge Base)
- Admin – Support (Access: Home/ System Status /Cases/Downloads/ Knowledge Base /Admin)
- User – FSPP (Read-only view of Full-Service Payment Plan Preferences)
- Admin – FSPP (Ability to update Full-Service Payment Plan Preferences)
- User-Market (Access: eCommerce)

# TRANSACT Client Portal User Guide

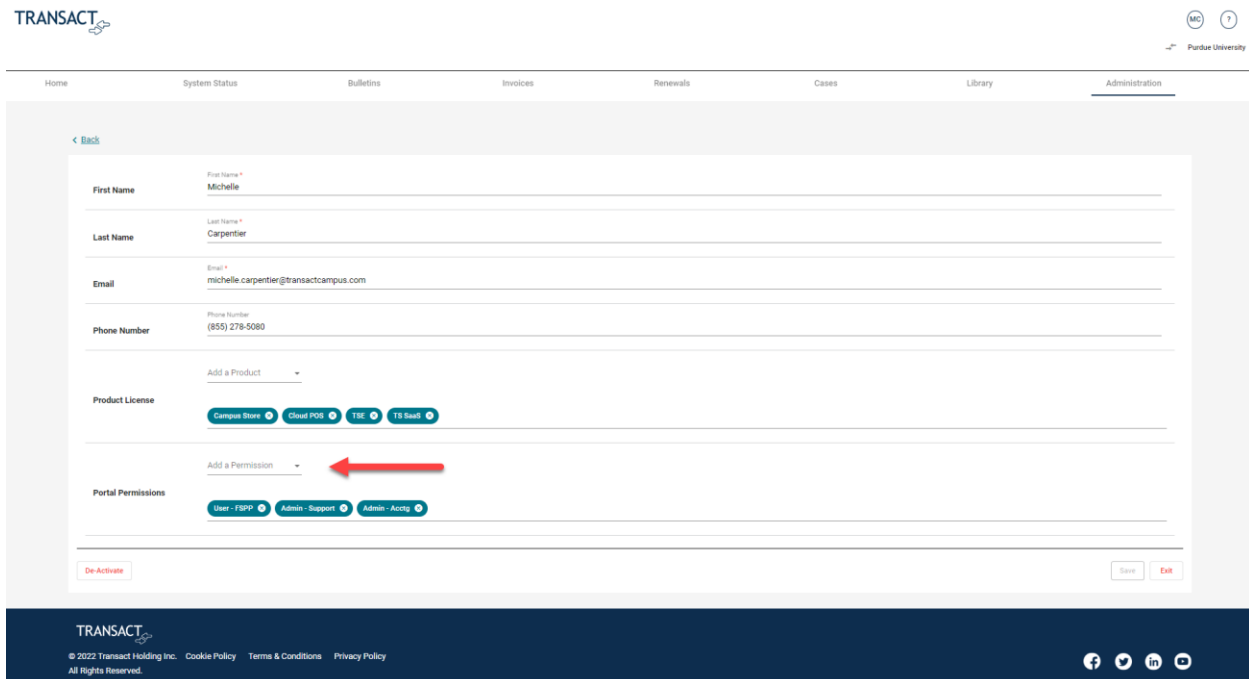
Click user >



The screenshot shows the 'Administration' section of the TRANSACT Client Portal. A table lists 46 contacts. A red arrow points to the contact 'Michelle Carpenter'.

Name ↑	Email	Phone Number	Status
<a href="#">Lori Seaton</a>	lseaton@purdue.edu.local	(765) 427-6663	Active
<a href="#">Lizabeth Heston</a>	lhettin@purdue.edu.local	(765) 496-0448	Active
<a href="#">Marshall Lewis</a>	mlewis@purdue.edu.local	(765) 496-0446	Active
<a href="#">Melissa Jones</a>	jones7@purdue.edu.local	(765) 494-5548	Active
<a href="#">Michelle Carpenter</a>	michelle.carpenter@transactcampus.com	(855) 278-5080	Active
<a href="#">Mitchell Daniels</a>	president@purdue.edu.local	(765) 494-4620	Inactive
<a href="#">Peter Holtenbeck</a>	pholten@purdue.edu.local	(765) 494-9709	Inactive
<a href="#">Ryan Diener</a>	rdiener@purdue.edu.local	(765) 496-9641	Active
<a href="#">Sandra Canty</a>	canty@pm.edu.local	(219) 989-2753	Active
<a href="#">Shawn Robertson</a>	srobertson@purdue.edu.local	(765) 496-3469	Active

Click, Add a new role to access dropdown menu >



The screenshot shows the user profile page for 'Michelle Carpenter'. A red arrow points to the 'Add a Permission' dropdown menu.

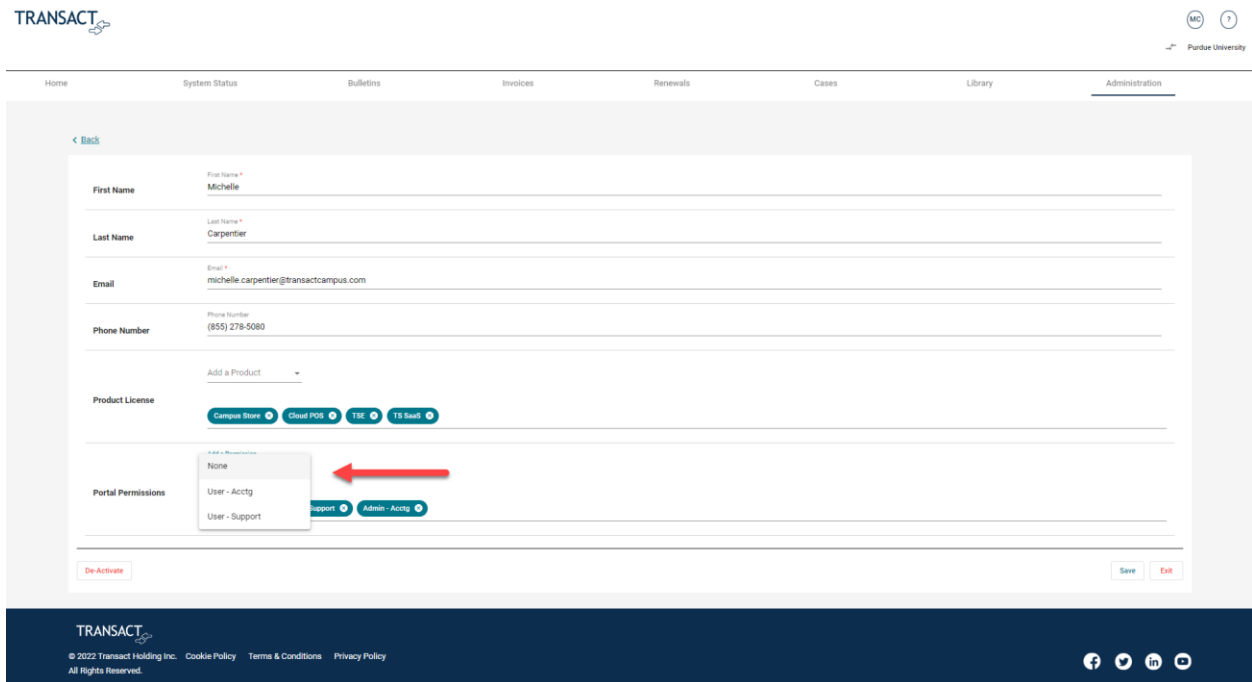
First Name: Michelle  
Last Name: Carpenter  
Email: michelle.carpenter@transactcampus.com  
Phone Number: (855) 278-5080

Product License: Campus Store, Cloud POS, TIC, TI Seed

Portal Permissions: User - FSPD, Admin - Support, Admin - Acctg

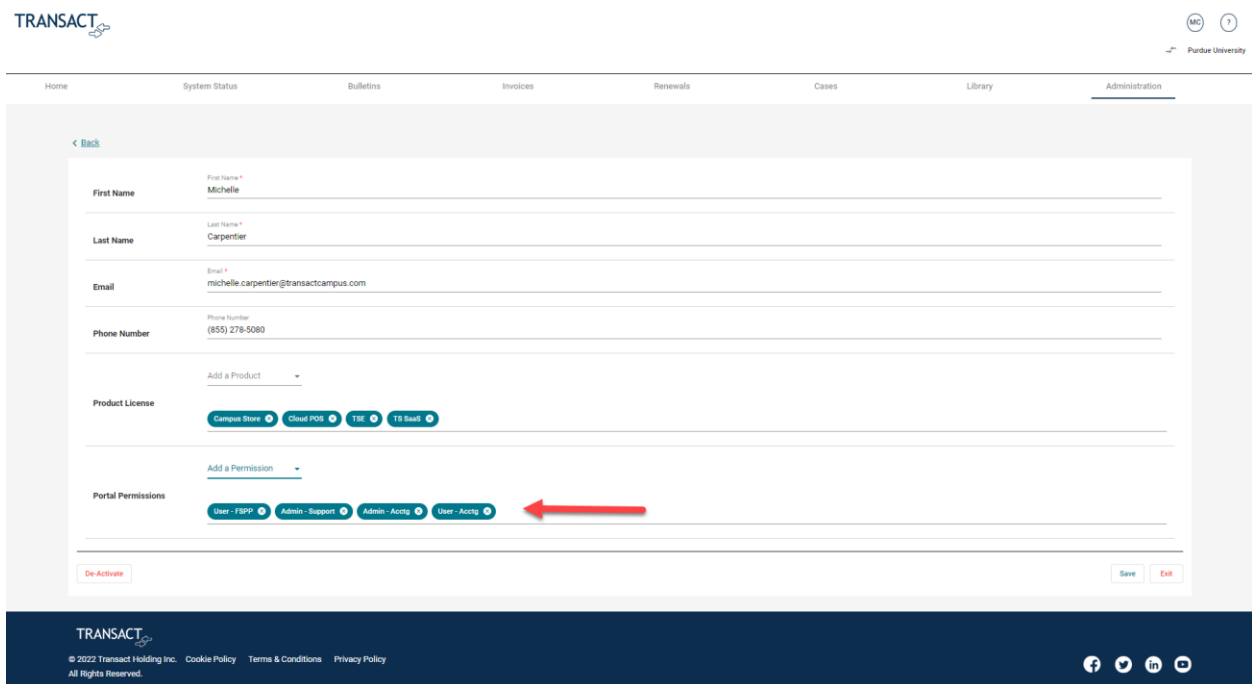
# TRANSACT Client Portal User Guide

Click on chosen role >



The screenshot shows the 'Administration' section of the TRANSACT Client Portal. The user profile for 'Michelle Carpenter' is displayed with fields for First Name, Last Name, Email, and Phone Number. Under 'Product License', there are buttons for 'Campus Store', 'Cloud POS', 'TSE', and 'TS Seed'. The 'Portal Permissions' section has a dropdown menu open, showing options: 'None', 'User - Acctg', and 'User - Support'. A red arrow points to the 'User - Support' option. At the bottom, there are 'De-Activate', 'Save', and 'Exit' buttons.

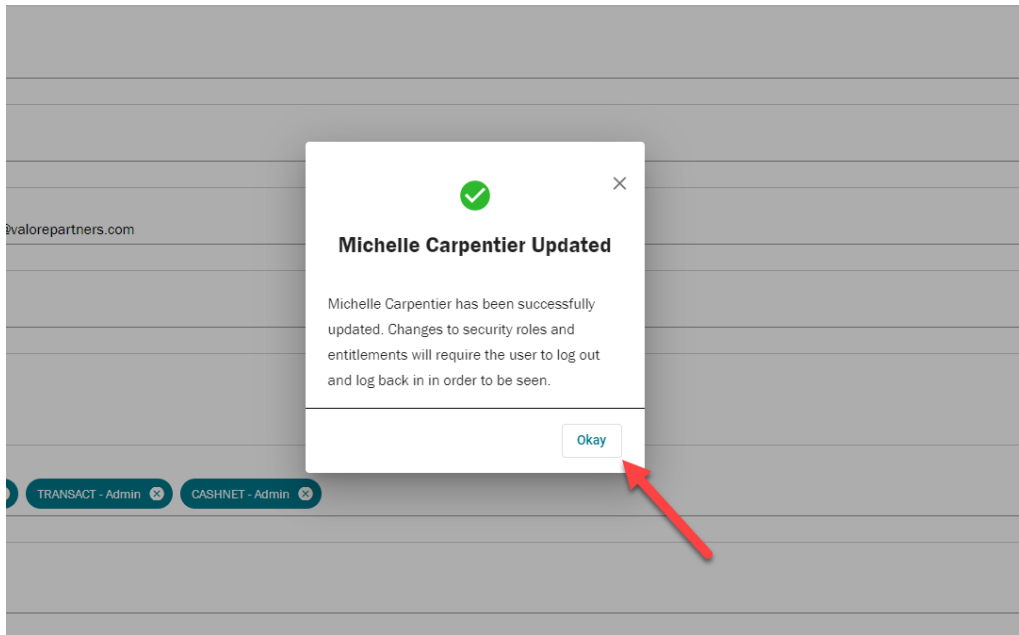
New role added > Click, Save >



This screenshot is similar to the previous one, but the 'Portal Permissions' dropdown menu is open, and a red arrow points to the 'User - Acctg' option. The 'User - Support' option is no longer visible. The rest of the page layout, including the navigation bar and footer, remains the same.

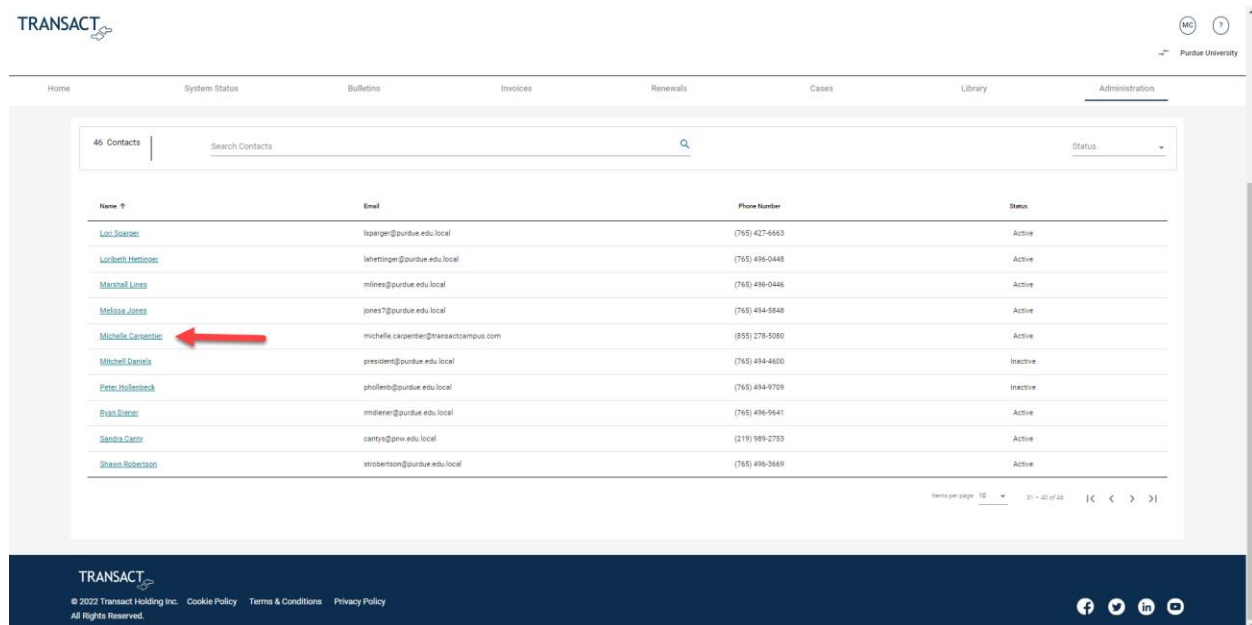


Click, Okay >



Remove Portal Permissions

Click username >



# TRANSACT Client Portal User Guide

Click, X on selected role >

The screenshot shows the user profile page for Michelle Carpenter. The 'Portal Permissions' section lists several roles: 'User - FSPP', 'Admin - Support', 'Admin - Acctg', and 'User - Acctg'. The 'User - Acctg' role is currently selected, and a red arrow points to the 'X' icon on its button, indicating that it should be removed.

Click, Save.

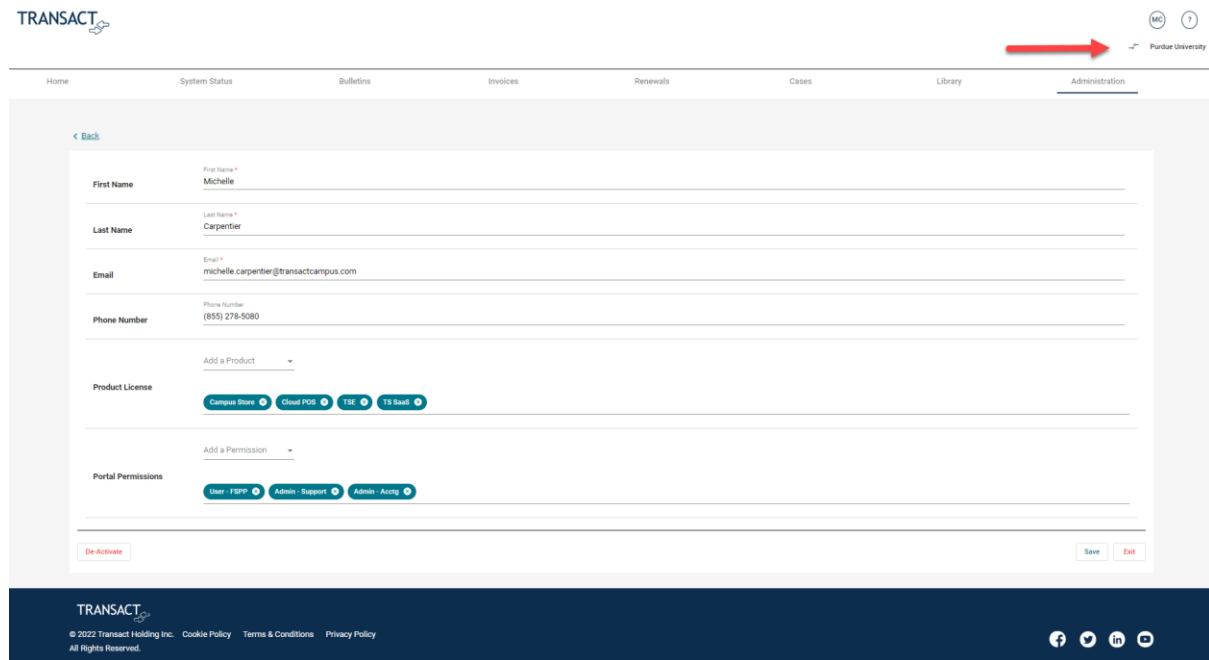
The screenshot shows the same user profile page, but now the 'User - Acctg' role has been removed from the 'Portal Permissions' list. A red arrow points to the 'Save' button at the bottom right of the form, indicating that the changes should be saved.

## Manage Partner Account

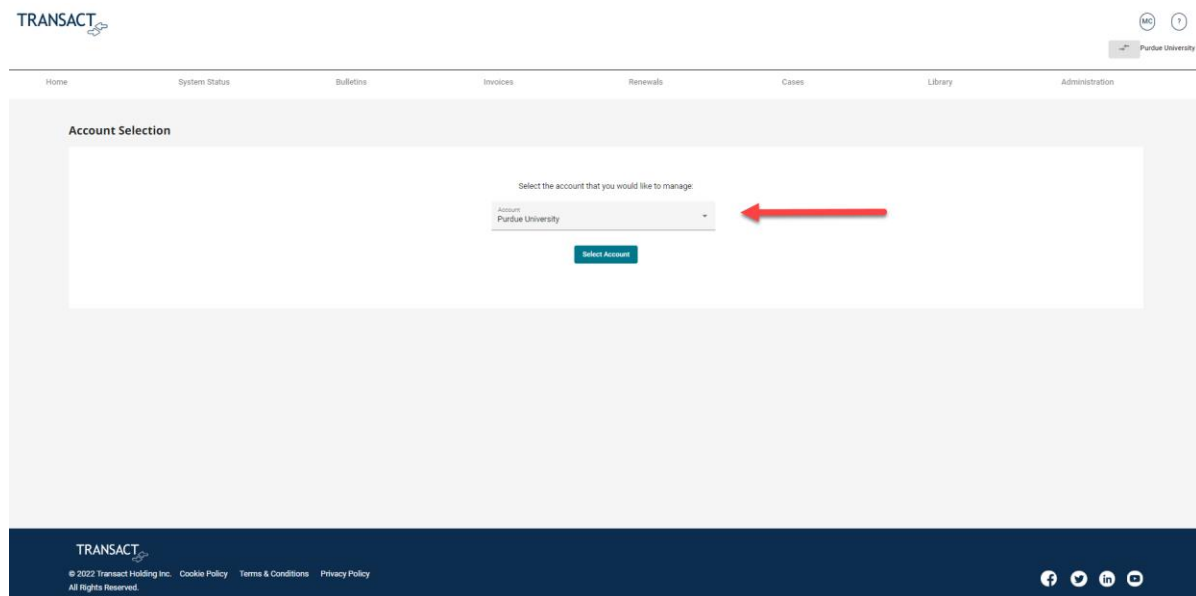
This ability is permission based and specific to users associated with multiple accounts.

## Switch Accounts

Click icon >

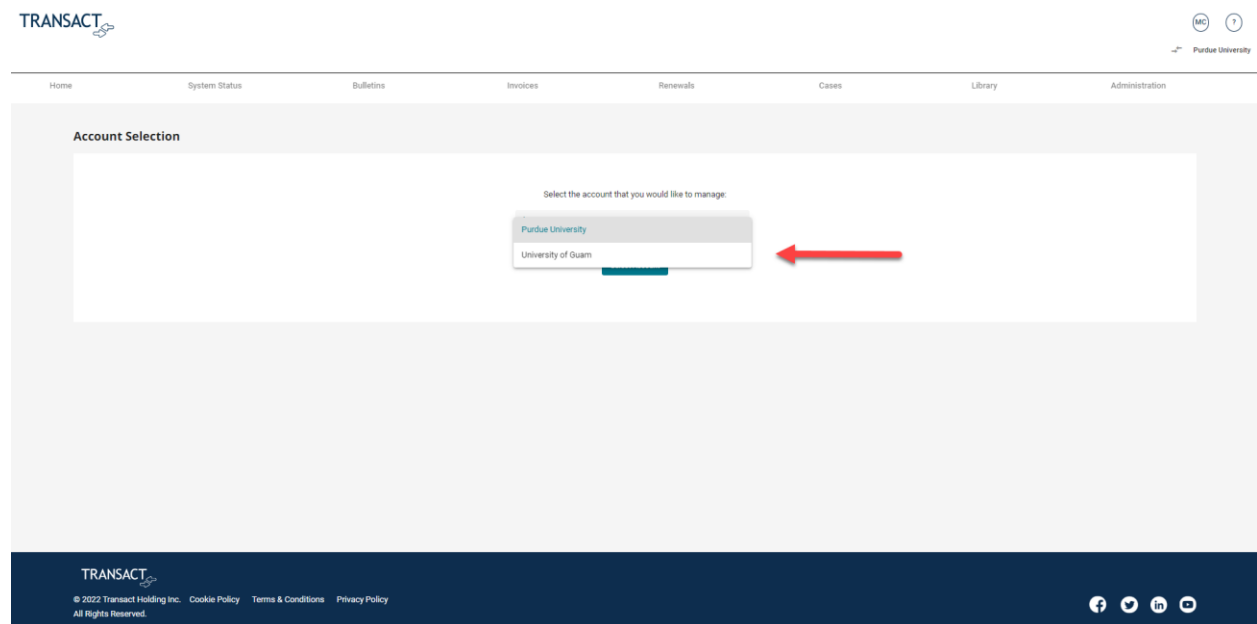


Click dropdown selector >

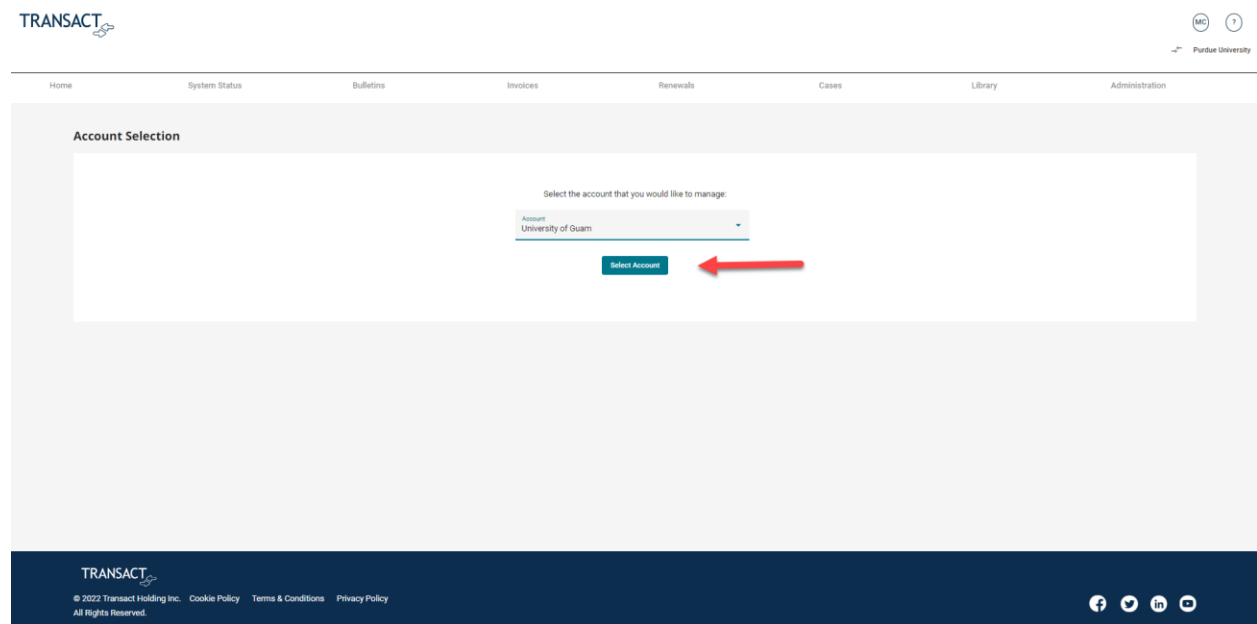


# TRANSACT Client Portal User Guide

Click on account of choosing >

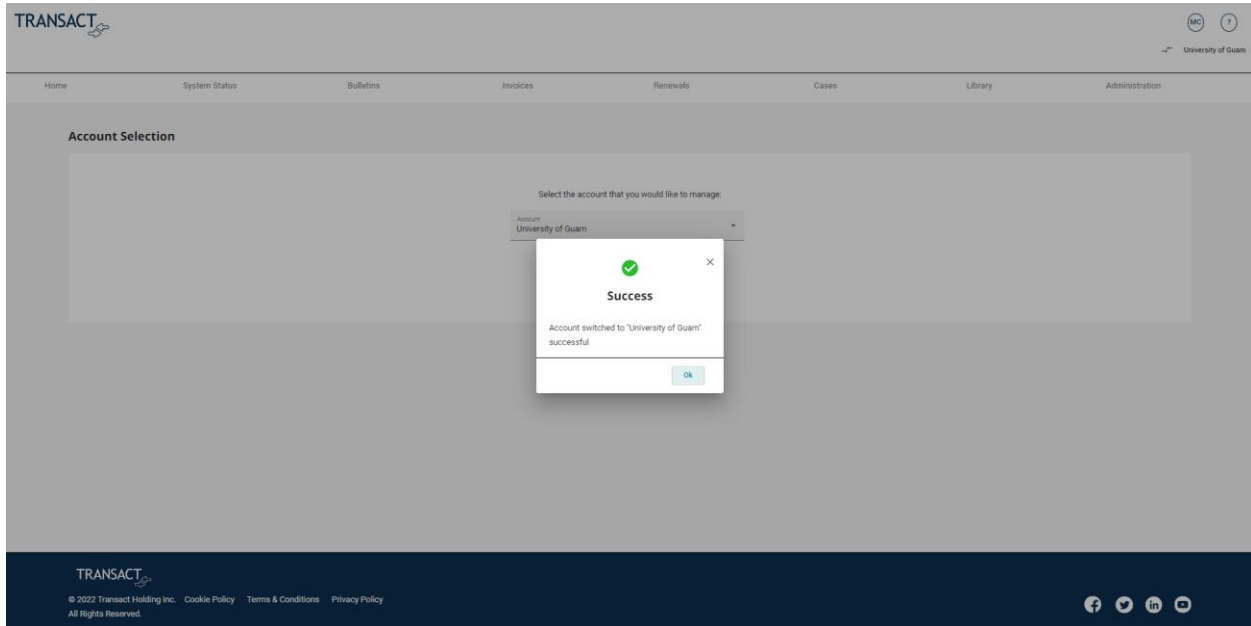


Click, Select Account >

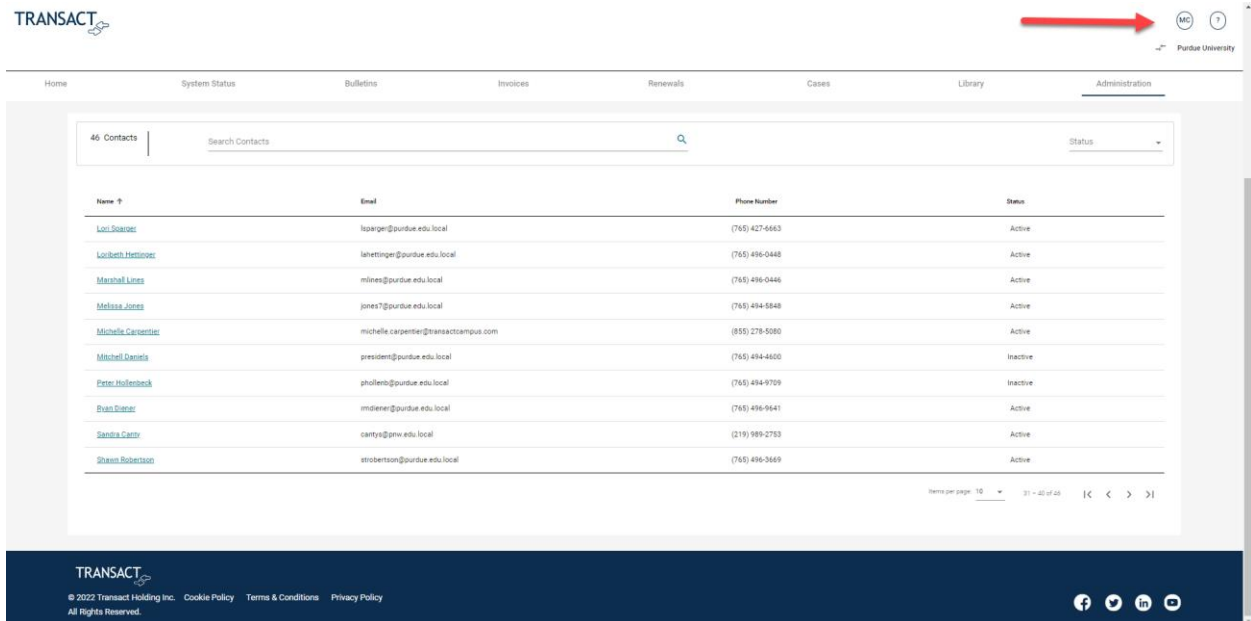


# TRANSACT Client Portal User Guide

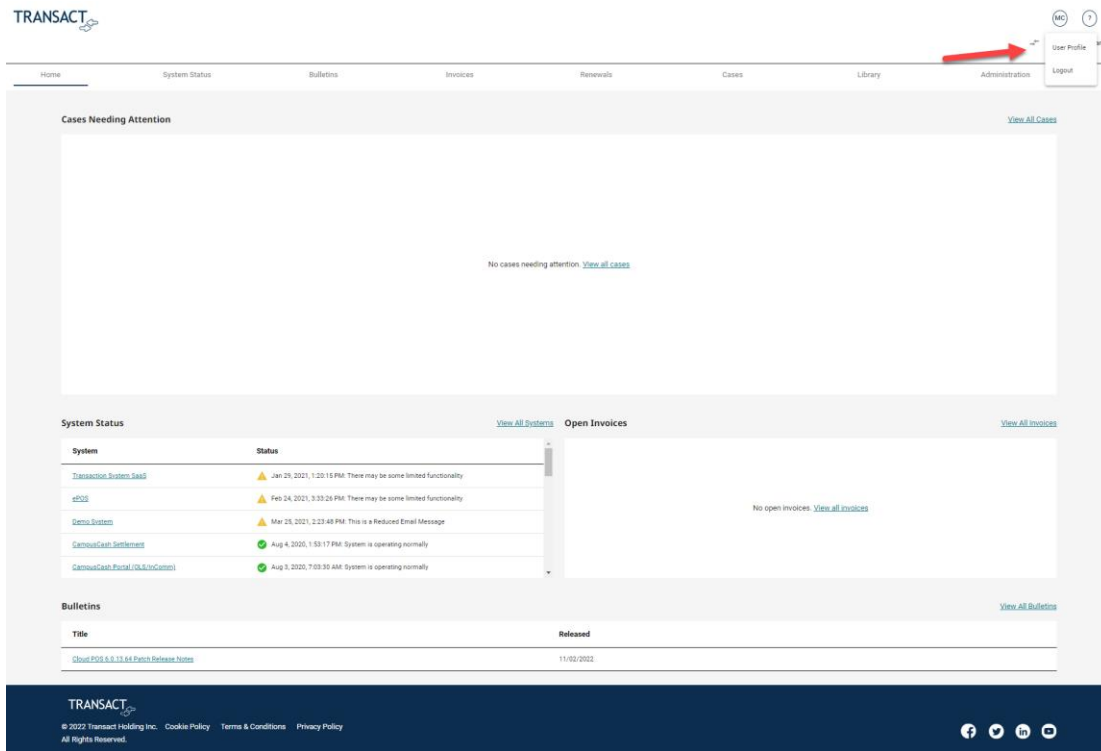
Account switch confirmed >



User Profile  
Click, User icon >



Click, User Profile >



View read only Product Licenses and Portal Permissions > Edit user info as needed > Click, Save.

