Herring Bank Campus Solutions Payment Forms Case Study

Products used: dbs LiveForms™ PRO

BACKGROUND

Herring Bank is a long-standing community bank, founded in 1899 and headquartered in Amarillo, Texas, that offers financial services for individuals and businesses across Texas, Oklahoma, and Colorado.

Herring Bank Campus Solutions provides a comprehensive suite of integrated payment solutions designed to facilitate financial transactions for colleges and universities. It offers an online payment gateway that equips colleges to efficiently manage and collect institutional funds online. This secure platform allows students and families to easily pay for tuition, fees, housing, and other expenses.. For the institution's business office, this solution streamlines financial reconciliation, enhances reporting capabilities, and significantly reduces the manual workload associated with processing payments.

BUSINESS CHALLENGES

Despite Herring's payment gateway solution featuring seamless integration with a university's existing administrative systems, they found that non-technical departments such as a school's business office, needed a way to quickly respond to internal requests for collecting payments for a wide range of use cases in order to maximize the use of the gateway.

Since the most flexible way to use a payment gateway is by using electronic forms, Herring contacted its long standing partner dbs Software and Services with its request for a forms solution that featured the following characteristics:

- SaaS based multi-tenant architecture that could serve many clients.

- Robust security features such as MFA, Authenticator, and SSO.

- A user friendly user interface to design, deploy, and manage all the different types of eForms that required online payments.

- Seamlessly integrated with Herring Bank's existing and future payment gateway.

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SUMMARY OF THE SOLUTION

Based on this request, dbs quickly configured a dedicated LiveForms environment for Herring Bank to begin rolling out the most common eForm use cases requiring payments.

These included:

1 - Forms to collect donations for clubs and other campus organizations.

2 - Forms to collect payment for charity events held by groups affiliated with the schools.

3 - Forms to collect ancillary fees for student services such as application fees.

While they serve varied use cases, these forms all have one thing in common: they use dbs Liveforms drag-and-drop payment control which allows clients to turn any form into one that collects payments by simply placing the control on the form itself.

With the initial use cases defined, the dbs team created templates of each of the new eForms in Herring Bank's Liveforms environment, and once completed the new forms were made available for testing by Herring Bank.

The design of the templates were completed in a matter of hours, and the testing was quickly completed to ensure the desired functionality.

The new dedicated environment with payment form templates provided Herring Bank the ability to quickly serve their payment gateway client needs. Since deploying the initial forms, Herring Bank has begun onboarding clients, leveraging the knowledge they acquired during training and backed up by dbs concierge level technical assistance provided as part of the LiveForms subscription.

ACHIEVED BENEFITS

With dbs LiveForms™ PRO, Herring Bank Campus Solutions is now able to provide its clients the ability to take payments for a wide variety of electronic form use cases across the entire campus. They can quickly onboard new clients, and provide them with production payment forms extremely fast. This in turn allows the college's business office to better serve students, while increasing the use of online payments.

Key benefits achieved by implementing dbs LiveForms™ PRO:

• Support for a wide range of payment form use cases using templates.

• Quickly design, deploy, and manage payment forms without the need for coding or IT involvement.

• Enable clients to make the most of their payment gateway connection.

DEPLOYED SOLUTION FEATURE SET

• dbs LiveForms™ PRO with drag-and-drop forms designer, workflow, and business rules engine.

• Payment form templates.

• Forms design and solution support from the dbs expert team.

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"I've worked with many other electronic forms tools, but the features and drag and drop design tools in dbs Liveforms and their form design support really puts their offering above and beyond. Best of all, our clients love the ability to deploy payment forms as quickly as their heart desires!"

~ Andy Bracciano, VP Business Development, Herring Bank Campus Solutions