

Frequently Asked Questions

Webinar: Transitioning from Your Third-Party Payment Provider

Caselle Citizen Portal: The All-in-One Payments and Citizen Engagement Solution

Background & Context

Q: Why is the XBP/Springbrook integration going away?

A: We have maintained a successful partnership with Xpress Bill Pay (XBP) for more than 13 years under a cooperative support model that helped fund and maintain the integration for our mutual customers. Earlier this year, Springbrook (XBP's parent company), notified us of its decision to discontinue its long-standing financial support for the integration. As a result, we re-evaluated the partnership and increased our focus on the Caselle Citizen Portal, our native payment solution. While the Citizen Portal has been part of our long-term strategy for some time, this change reinforced our decision to invest in a payment experience that is fully integrated with our platform.

Q: XBP and Caselle have provided conflicting information about who is ending the integration. Can you clarify?

A: We understand the confusion. Earlier this year, Springbrook ended the support model that funded and maintained the XBP/Caselle integration. Maintaining payment integrations requires significant ongoing investment — including engineering, testing, support, maintenance, and operational resources. Without the financial support that had existed for many years, continuing to invest those resources in a third-party payment solution was not a sustainable long-term approach. As a result, we have decided to phase out the XBP integrations, including the real-time and Process Online Payments (POP) integrations, and focus on providing more value through our Citizen Portal.

Q: Why did Caselle build the Citizen Portal when third-party payment solutions already exist?

A: We have spent years supporting third-party payment providers because we believe offering customers options is important. In many cases, customers have relied on us to evaluate those options and guide them toward a trusted partner.

Over time, we found that payments are simply too important to our customers' operations for us to remain dependent on third parties. No single provider was the right fit for every customer, and we were often limited in our ability to address customer needs because the solution was outside our control.

A few years ago, we decided to invest in the Citizen Portal because we believed we were uniquely positioned to deliver a better long-term experience. We understand not only payments, but also how payments connect to utility billing, accounting, citizen services, and the broader operations of local government. We also know how much our customers value integrated solutions that work seamlessly together rather than relying on multiple vendors and disconnected systems.

XBP Transition Timeline & Options

Q: When will the XBP integration end?

A: Our current plan is to begin the sunset process in Q4 2026, with the transition continuing through 2027. As part of this effort, both the real-time and Process Online Payments (POP) integrations with XBP are expected to be retired during 2027.

Throughout the transition, we will continue to invest in and enhance our native payment solutions to ensure customers have access to the same—or greater—capabilities and functionality.

We understand that every customer's needs and circumstances are unique, and there is no one-size-fits-all migration path. We are committed to providing advance notice of key milestones and will work closely with customers to develop and execute a transition plan that supports a smooth and successful experience.

Q: We signed a multi-year contract with XBP. Will Caselle support the integration for the duration of our contract?

A: We will continue supporting the current integrations until the sunset plan goes into effect. The sunset plan will begin in Q4 2026 and continue through 2027. You will receive several months' notice before your integration is phased out. If you have questions about what this means for your organization, please contact your Account Manager, who can help build a transition plan that meets your needs.

Q: Will I still be able to import XBP payments into Caselle after the integration ends?

A: It depends on your current setup and contract terms. We do not control XBP contracts. Because timelines and integration methods vary by customer, we encourage you to contact your Account Manager to discuss how these changes may affect your organization and what options will be available moving forward.

Q: Can we use both the Caselle Citizen Portal and XBP simultaneously during a transition?

A: Yes. It is possible to run both payment portals simultaneously during a transition period.

Q: Is my only option for keeping XBP to replace Caselle?

A: No. We value our partnership with you and remain fully committed to supporting your organization and earning your business.

If you choose to continue using XBP, you may do so. The existing integration is scheduled to be sunset beginning in Q4 2026 and continuing through 2027. Customers who remain with XBP should expect to transition to a manual daily import process, along with manual customer balance exports. While the integration and much of its convenience will no longer be available, Caselle will continue supporting your broader needs across the platform.

If you decide to evaluate other ERP vendors, we encourage you to ask detailed questions about their long-term payment strategy and the level of integration they provide with third-party payment processors. Most ERP vendors have already shifted toward payment solutions they own and control directly and are no longer investing heavily in third-party integrations. Customers may find that the level of integration and automation historically available between Caselle and XBP is uncommon across the broader ERP market.

Third-Party Processors — Broader Strategy

Q: Is Caselle ending its integration with all third-party payment processors, or just XBP/Springbrook?

A: We ultimately intend to phase out full real-time integrations with all third-party payment processors. Currently, other third-party integrations continue to operate under revenue-sharing agreements, and there are no immediate plans to discontinue those integrations. However, over time, all fully integrated third-party partners are expected to transition to a manual payment import model. We will provide ample advance notice before any changes take effect.

Process Online Payments & Real-Time Payments

Q: Will the "Process Online Payments" (POP) feature in Caselle be going away?

A: Yes. POP will be phased out as part of sunsetting XBP integrations. When that happens, payments will need to be imported manually. We will communicate these changes in advance and provide plenty of notice prior to implementation.

Q: Will real-time payments still be available?

A: Yes, but only through the Caselle Citizen Portal. Real-time payments will be phased out for all third-party payment processors. Real-time integration exists for all payments including utilities, accounts receivable, permits, and much more through the Caselle Citizen Portal.

Caselle Citizen Portal — Features**Q: What types of payments and services does the Citizen Portal support?**

A: The Citizen Portal supports payments for utility bills, business licenses, building permits (via our Community Development suite), court payments (through the Guest Pay feature), and custom forms for city events or other applications. A mobile app is also on the future roadmap.

Q: Can citizens pay without creating an account?

A: Yes. The portal supports guest payments. The new service sign-up process is also available both inside and outside of a login, so citizens can complete it either way.

Q: Can citizens apply for a new utility service through the portal?

A: Yes. Citizens can apply for new services through the portal whether or not they have an existing account.

Q: Does the portal support autopay, and can citizens manage it themselves?

A: Yes. Citizens can enroll in AutoPay and make changes to their autopay settings directly through the portal. Staff can also enroll citizens in AutoPay on their behalf. If a saved credit card is nearing its expiration date, the customer will receive an email notification and, if opted in to text messaging, an SMS notification as well.

Q: Does the portal support paperless billing?

A: Yes. Citizens can sign up for paperless billing directly in the portal, and that preference flows automatically back to their customer record in Utility Billing. No manual update to the customer record is required.

Q: Can citizens pay over the phone?

A: Yes. We offer an IVR (Interactive Voice Response) payment option available in both English and Spanish. The system is fully automated and allows citizens to make payments conveniently over the phone.

Q: Does the portal support bank bill pay?

A: Yes. Bank Bill Pay is available as an additional payment option for citizens.

Q: Can staff send payment links to citizens by email or text?

A: Yes. Staff can send a unique payment URL by email or text that automatically fills in all the payer's information, making the process easy for the citizen.

Q: Is the portal mobile-friendly?

A: Yes. The portal is fully mobile-friendly.

Q: Does the portal work if we are server-based (not cloud-hosted)?

A: Yes. You do not need to be cloud-hosted to use the Citizen Portal. It functions with Caselle Connect whether it is installed on your desktop or hosted by us.

Q: Is there any risk of citizens viewing other citizens' balances on guest pay?

A: This feature can be turned off if you prefer to prevent citizens from looking up accounts they don't own.

Q: Can citizens be blocked from paying by check if they have a history of NSF or closed accounts?

A: Yes. There are checkboxes on the customer record that allow you to block a citizen from paying by credit card and/or ACH to avoid NSF situations.

Q: Are there plans for a lockbox payment feature?

A: Yes. We plan to offer lockbox functionality, with availability currently targeted for Summer 2026.

Fees, Costs & Payment Processing**Q: Who is Caselle's backend card payment processor?**

A: Our software uses Zift as its credit card payment processor. For information on available POS/card swipe terminals, visit: <https://zift.io/pos-terminals/>

Q: Will our costs change when we move from XBP to the Caselle Citizen Portal?

A: In most cases, costs will be similar to what you are paying today. Our goal is to replicate the same fee structure as XBP. Your Account Manager can walk you through specifics — contact us to be connected with yours.

Q: Can credit card processing fees be passed on to citizens rather than absorbed by the municipality?

A: Yes. You have full flexibility. You can pass credit card fees to the customer while absorbing ACH fees, absorbing all fees, or passing all fees to the customer. The service fee structure replicates what you are used to with your current processor.

Q: Are the credit card service fee percentages fixed?

A: No. They depend on a few variables and will generally be set to match your current payment processor's rates.

Q: Is there an additional cost to use the portal for services beyond utility billing?

A: Yes. There is an additional charge for capabilities beyond your core modules. Speak with your Account Manager for pricing details.

Window & In-Person Payments

Q: How will in-person (window) payments be handled through Caselle?

A: We offer an Online Cash Receipting application that enables staff to process in-person payments at the counter, including credit card, cash, and check payments. For card transactions, dedicated payment terminals can also be used. The solution does not require individual user licenses, allowing an unlimited number of staff members to be set up and process payments as needed.

Property Tax, Court & Other Modules

Q: Can the portal accept real estate tax payments?

A: Yes. If you are using Caselle's Property Tax module, real estate tax payments are now supported through the portal.

Q: Does the portal support court payments?

A: Yes. Court payments can be processed through the Guest Pay feature within the portal.

Q: Is this portal available in both Caselle Clarity and Caselle Connect?

A: The Citizen Portal is available in Caselle Connect only at this time.

Support & Transition

Q: Will transitioning to the Caselle Citizen Portal add to support wait times?

A: We have dedicated support representatives today and are actively hiring new support staff dedicated specifically to payments, in addition to continuing to grow support for all applications. Improving your support experience is a top priority that we are actively investing in.

Q: Our citizens are mostly seniors and may find a new portal confusing. What accommodations are available?

A: Our design takes all users into account, including older residents. Staff can assist citizens in getting registered and enrolled in AutoPay directly from the admin side. If you have specific usability concerns, we welcome feedback to improve the experience.

Integrations & Third-Party Applications

Q: Does Caselle plan to integrate with third-party applications such as building permits, parks and recreation, reservations, and other community services systems?

A: Yes. We intend to continue expanding the integration capabilities of the Caselle Citizen Portal and are actively exploring integrations with a variety of third-party solutions, including permitting, licensing, parks and recreation, reservation, and other community services platforms. Integration opportunities are evaluated based on customer demand, technical feasibility, and the capabilities of the third-party provider. If you have questions about a specific system, please contact your Caselle representative to discuss available options and future integration opportunities.