

Update Customer Email Address

Update Account Holder Email in RevTrak

[3693991] Person

Prs. First, Last, Suffix: [Angel] [Juarez]

Email: angel@notemail.com

Address: 5652 Evergreen Road

City, State, Zip: Monrovia, CA, 91016

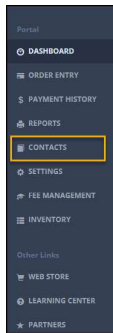
Birthdate, Age, Grade: 07/22/2000, 22, 12th

Gender: Male Female

RT Cust ID: 17448

Registrations For: Juarez, Angel

Date	Title	Location	Status	Ref.	Balance
9/24/2020	20/21 US Government &	High School	Enrolled	17648002	\$70.00



- ◆ Please note that Account Holders in RegWerks are identified by **RT Cust ID**. Where there is a series of numbers in RT Cust ID, this denotes Account Holder status.
- ◆ Log into your RevTrak Portal account. URL: **schoolcode.revtrak.net/portal**. For example, the school's RegWerks URL: **abc.facilitywerks.com/admin/** and RevTrak Portal URL: **abc.revtrak.net/portal**.
- ◆ Select **Contacts** in the left navigation bar.
- ◆ If you are unable to see Contacts or if you are unable to log in, please reach out to a Super User in your organization to update your credentials.
- ◆ If there are no other Super Users, please contact RegWerks Support: **support@regwerks.zendesk.com** or **888.847.9470**.

Search on Account

- ◆ In **Contacts**, search on the Account Holder's last name to confirm if there are duplicate accounts with different emails.
- ◆ Locate the account containing the current email address. Double click into that account.
- ◆ In the **Edit Contact** window which opens, add a number to the end of the Account Holder's first name. **Click Update**.
- ◆ Wait 2-3 minutes to allow the system to refresh itself.

RevTrak Contacts

Vanco Valley SD

+ NEW CONTACT EXPORT TO EXCEL

FIRST NAME	LAST NAME	PHONE	EMAIL
Angel	Juarez	8888888888	angel@notemail.com
Clarissa	Juarez	5555555555	cjuarez@notemail.com

Edit Contact

Contact ID: 7478

First Name: Angel5

Last Name: Juarez

Company Name:

Email: angel@notemail.com

Phone: 888.888.8888

Address #1: 5652 Evergreen Road

Address #2:

City: Monrovia

State: CA

Zip: 91016

Country:

Last modified on: 9/1/2022 12:23:35 PM

[Cancel] [Update]

Search on Account Holder's last name in RegWerks.

- ◆ Return to RegWerks. URL: schoolcode.facilitywerks.com/admin/.
- ◆ In **Person**, search on the Account Holder's last name. In the Account Holder's account that displays the current email address, confirm that the first name reflects the change (e.g. Angel5) that was made in the RevTrak Portal. This affirms that the RegWerks account and the RevTrak account are properly linked.
- ◆ If the RegWerks Account Holder's first name does not match the first name in the RevTrak Portal, please contact RegWerks Support for assistance: support@regwerks.zendesk.com.

ID	Name	Age	Email
	juarez		
3693991	Juarez, Angel5	22	angel@noemail.com
4376739	Juarez, Clarissa	0	cjuarez@notemail.com
4376740	Juarez, Joseph	7	cjuarez@notemail.com
4403253	Juarez, Sami	0	angel@noemail.com

- ◆ If the first names both match between RegWerks and the RevTrak Portal, proceed to the next step.
- ◆ Return to the RevTrak Portal. Double click into the Account Holder's account that has the number in the first name.

Update the email address in the RevTrak Portal.

Edit Contact

Contact Details

Contact ID: 7478 (Click Here To Impersonate)

First Name: Angel

Last Name: Juarez

Company Name:

Email: angel@notanemail.com

Phone: (888) 888-8888

Address #1: 5653 Evergreen Road

Address #2:

City: Minneapolis

State: MN

Zip: 55376

Country:

Last modified on: 9/1/2022 3:02:53 PM

CANCEL UPDATE

- ◆ In the **Edit Contact** window which opens, navigate to **Contact Details**.
- ◆ Delete the number from the Account Holder's first name.
- ◆ Enter the new email address in the Email field.
- ◆ Click **Update** to complete the revision of this account.
- ◆ Wait 2-3 minutes to allow the system to refresh itself.

Confirm the email change in RegWerks.

ID	Name	Age	Email
	juarez		
3693991	Juarez, Angel	22	angel@notanemail.com
4376739	Juarez, Clarissa	0	cjuarez@notemail.com
4376740	Juarez, Joseph	7	cjuarez@notemail.com
4403253	Juarez, Sami	0	angel@noemail.com

- ◆ Return to RegWerks.
- ◆ Under the Main Menu, navigate to **Person**.
- ◆ Search on the Account Holder's last name, and review the account to confirm that the email has been updated.

Emails in RegWerks

Helpful Tips

- ◆ As long as the family's email addresses for the Account Holder and Student/Participant match, the email update completed in the RevTrak portal will automatically flow to the Student/Participant accounts in RegWerks.
- ◆ If the family's (Account Holder and Student/Participant) email addresses do not match, however, the Student/Participant emails must be manually edited in RegWerks.

Update Student/Participant Email in RegWerks

- ◆ To update Student/Participant email addresses, open RegWerks after the Account Holder's email address has been updated in the RevTrak portal.
- ◆ Change the existing names of each Student/Participant in the family in RegWerks (e.g. Sam becomes Sam5). Save once complete.

[4403253] Person

Pre, First, Last, Suffix: Sam Juarez

Email: angel@noemail.com

Address: 5653 Evergreen Road

City, State, Zip: Minneapolis MN 55376

Birthdate, Age, Grade: 8/22/2022 22/23 Calligraphy & Vanco Valley Schoo Enrolled 17648004 \$0.00

Registrations For: Juarez, Sam

Date	Title	Location	Status	Ref.	Balance
8/22/2022	22/23 Calligraphy &	Vanco Valley Schoo Enrolled		17648004	\$0.00

Reports Cancel Save

[4403253] Person

Pre, First, Last, Suffix: Sam5 Juarez

Email: angel@noemail.com

Address: 5653 Evergreen Road

City, State, Zip: Minneapolis MN 55376

Birthdate, Age, Grade: 8/22/2022 22/23 Calligraphy & Vanco Valley Schoo Enrolled 17648004 \$0.00

Registrations For: Juarez, Sam

Date	Title	Location	Status	Ref.	Balance
8/22/2022	22/23 Calligraphy &	Vanco Valley Schoo Enrolled		17648004	\$0.00

Reports Cancel Save

Complete Partial Walk-In Registration

- ◆ Next complete a partial walk-in registration in RegWerks. Begin by searching on the Account Holder's **updated** email address.

Email	angel@notanemail.com	Search
Name	Email	Address
Juarez, Angel	angel@notanemail.com	5653 Evergreen Road

- ◆ Add **A New Person**, using the Student/Participant's real name (e.g. Sam is Sam). **Submit** to complete.

Who are you registering?

Please select the person you would like to register for History AP Tests.

☐ Angel Juarez (*self*)

☐ Sam5 Juarez (*other*)

☐ A New Person

Add Person

First Name Sam ✓

Last Name Juarez ✓

Close Submit

- ◆ Once you see the Student/Participant listed beneath the Account Holder, close the browser tab.

Who are you registering?

Please select the person you would like to register for History AP Tests.

☐ Angel Juarez (*self*)

☐ Sam5 Juarez (*other*)

☐ Sam Juarez (*other*)

☐ A New Person

Merge Duplicate Accounts

- ◆ In Person, pull up the customer's last name. Hold down the Control key, then click on the two Student/Participant accounts that must be merged. Then select **Merge**.

ID	Name	Age	Email	Address
	juarez			
3693991	Juarez, Angel	22	angel@notanemail.com	5653 Evergreen Road
4376739	Juarez, Clarissa	0	cjuarez@notemail.com	456 Birch
4376740	Juarez, Joseph	7	cjuarez@notemail.com	456 Birch
4419121	Juarez, Sam	0	angel@notanemail.com	5653 Evergreen Road
4403253	Juarez, Sam5	0	angel@noemail.com	5653 Evergreen Road

Reg. Date	Class
8/22/2022	22/23 Calligraphy & Lett

- ◆ In the Duplicate Manager window that opens, click on the correct name of the Student/Participant. (e.g. Sam Juarez).

Reg. Date	Class
8/22/2022	22/23 Calligraphy & Lett

- ◆ Next confirm that the correct Student/Participant account appears at the top of the window. Select **Complete Merge**.