RevTrak Portal

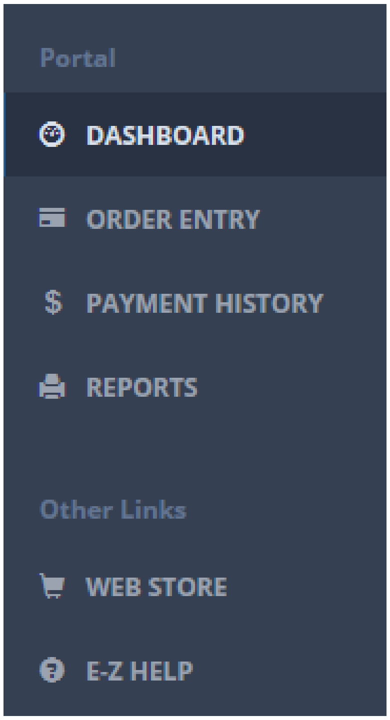
Basic User Guide

RevTrak
a Connexeo company

04/11/18

Contents

Dashboard Navigation



The ***RevTrak***® Portal navigation bar is found on the left side of the screen. You will use this to navigate through the Portal. Whenever you need to access the Portal home page, or Dashboard, select “**Dashboard**.”

To process in-person payments, select the “**Order Entry**” module**.**

“Payment History” may be used to locate a transaction and to review item history and order history.

Deposit reports and transaction details may be reviewed under “Reports.”

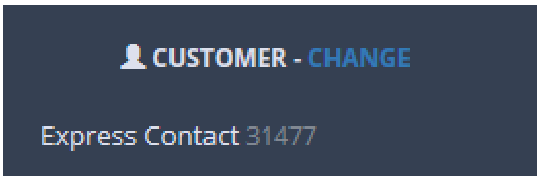
Under the heading “Other Links” are a few helpful links. You can view the “Web Store.” There is also a link to “E-Z Help,” which is where service requests can be entered and tracked. Knowledge Books and FAQs about the Web Store and Portal may also be accessed through E-Z Help.

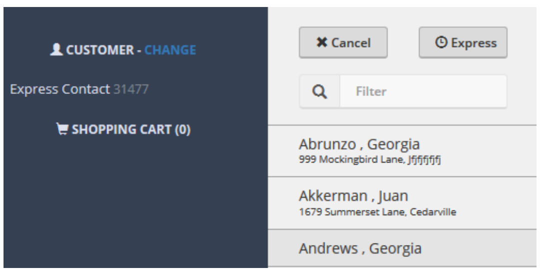
Processing an Order Entry Transaction

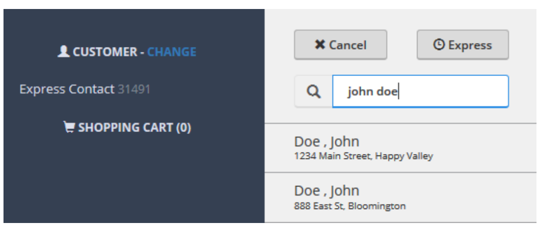
Order Entry allows you to collect in-person, phone-in, and mail-in payments. You must be logged in to the ***RevTrak***® Portal to use Order Entry. Please note that Internet Explorer is the required browser to use a card reader with Order Entry.

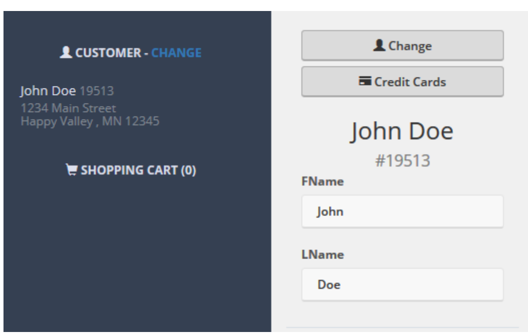
Once you have clicked "**Order Entry**" (the second option on the navigation bar) you are ready to begin.

Selecting a Customer









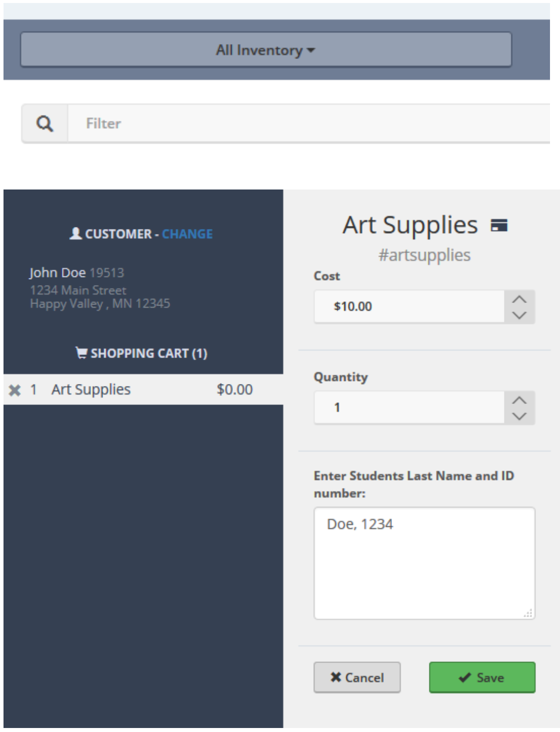
To take an in-person payment, you first need to indicate from whom you are receiving the payment. The default setting will indicate an "Express Contact." If you continue using an Express Contact for your Order Entry transaction, the customer will not be emailed their receipt at the end of the transaction.

Order Entry includes existing Web Store customers. To look up an existing customer, click "**Change**." A menu will slide out.

You will be able to search for the customer using the search field labeled "Filter." Once you have located the customer, click on their name. Once you have selected the name the customer, you can either view or edit their card information, or you may begin adding items to the shopping cart.

Current customers with valid email addresses will receive a transaction confirmation via email.

Adding Items to the Shopping Cart



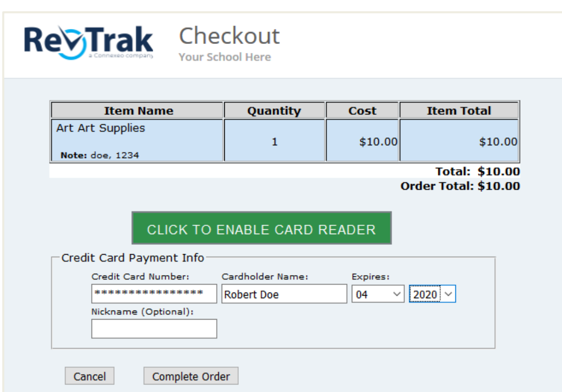
You can easily locate items by choosing an "Inventory" group from the dropdown menu. You may scroll through all items or search for the item by the item name in the "Filter" field. Click on the item to add it to the Shopping Cart.

Enter any required information for the item and click "**Save**." This will add the item to the "Shopping Cart." The item will not allow you to save if there is required information that has been left incomplete.

The "Shopping Cart" will display all items selected for purchase. You may edit any one of the items by clicking on the item name. To delete an item from the "Shopping Cart," select the item and an "x" will appear. Click the "**x**" and the item will be removed.

Confirm the items in the cart with the customer and then proceed to Checkout.

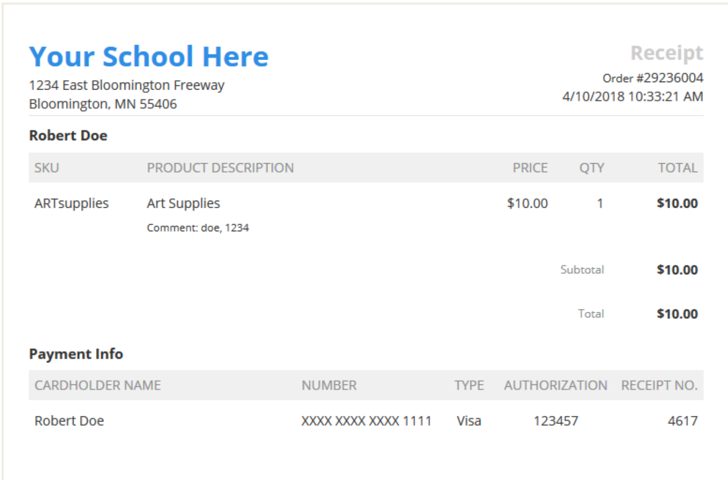
Checking Out



If the customer is currently a Web Store customer, you will have the option to have them pay with a previously saved card account. You may also enter a new card account at this time.

If the customer requests that the card account not be saved in Order Entry or in the Web Store, you may uncheck "**Save this card**." Once you have verified the information on the checkout screen, click "**Complete Order**" to process the transaction.

Receiving Payment Confirmation



Your School Here
1234 East Bloomington Freeway
Bloomington, MN 55406

Receipt
Order #29236004
4/10/2018 10:33:21 AM

Robert Doe

SKU	PRODUCT DESCRIPTION	PRICE	QTY	TOTAL
ARTsupplies	Art Supplies Comment: doe, 1234	$10.00	1	**$10.00**
			Subtotal	**$10.00**
			Total	**$10.00**

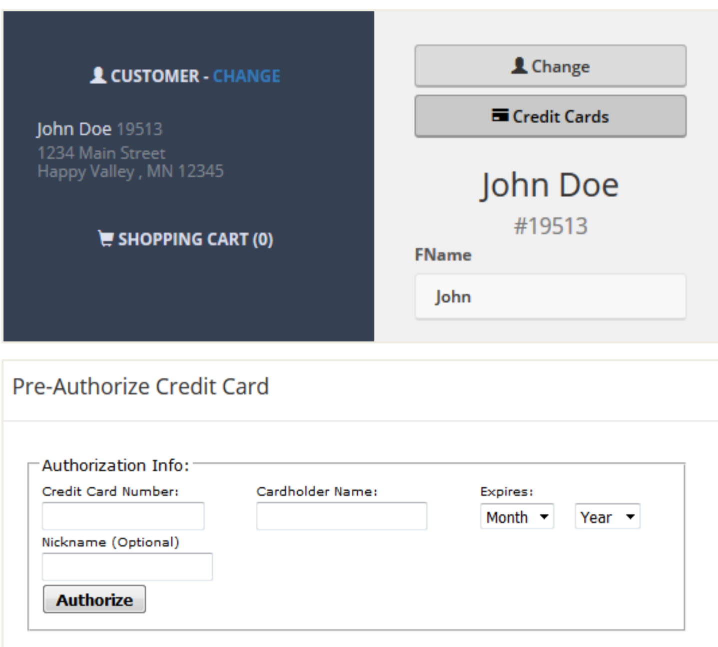
Payment Info

CARDHOLDER NAME	NUMBER	TYPE	AUTHORIZATION	RECEIPT NO.
Robert Doe	XXXX XXXX XXXX 1111	Visa	123457	4617

Once the transaction has processed, a receipt will display and can be printed for Card Present transactions. Customers who have a valid email address on file will also be emailed a receipt for their transaction.

If issues occur in generating the receipt, click "**Print Friendly Receipt**" (on the upper right of the screen) to display the receipt.

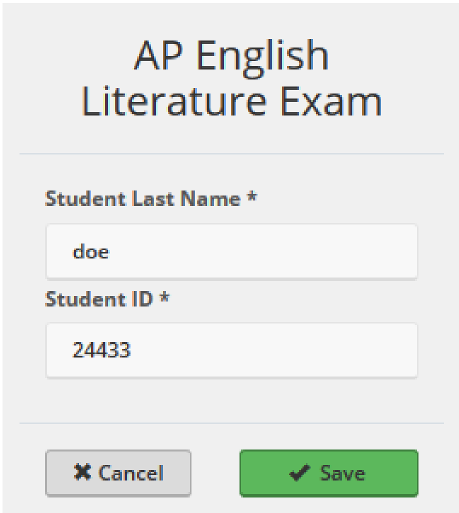
To change future receipts to all display with the printer friendly format, see "Adjusting Receipt Settings" (page 7).



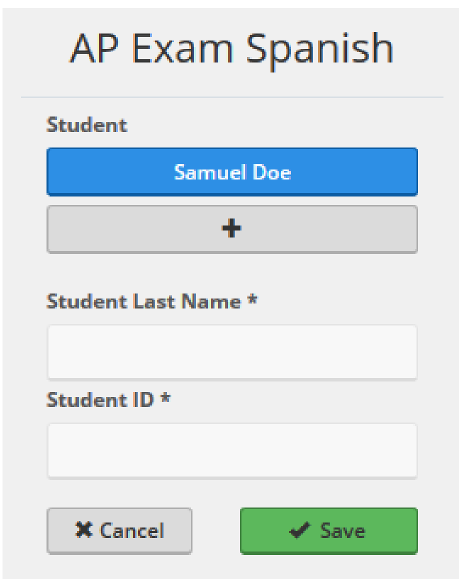
You may pre-authorize a customer's card for use with future payments. *This is optional.* First you will need to search for and select a customer. You will then click "**Credit Cards.**"

Next, click "**Add New Card.**" The "Pre-Authorize Credit Card" screen will then appear. Enter the customer's card account information and click "**Authorize.**" You will receive an approval message stating the authorization has been processed. The card account information will now be saved and can be used for future purchases.

Processing an Order Entry Transaction for an Item with Account-Linking

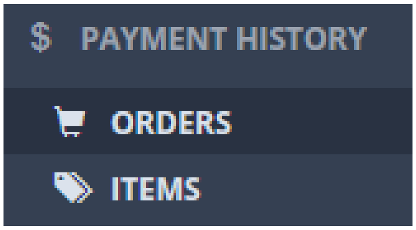


After selecting a customer (page 3), add an item to the cart (page 4). An item that uses Account Linking will have fields to enter the contact's last name and ID number. After completing the fields, click the "**Save**" button. The item will be placed into the cart. You may process the payment as usual.



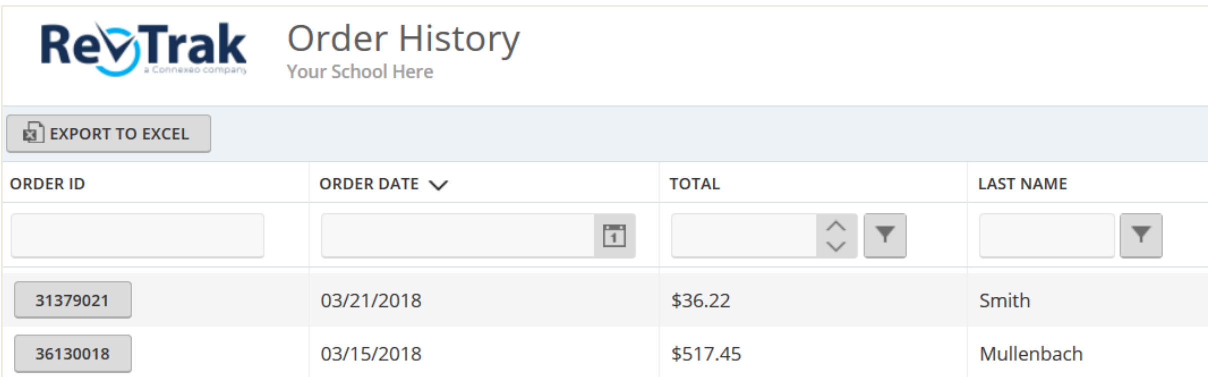
The import list contact will be linked with the payor account for additional fees and transactions.

Payment History

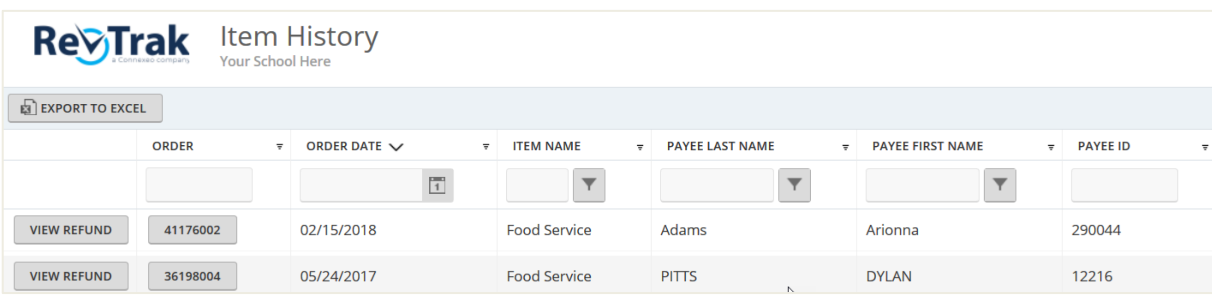


You can use “Payment History” to view both Order and Item History for purchases made through your Web Store and Order Entry.

When viewing both Item and Order History, you have several options for filtering orders (Order ID, Order Date, etc.). These filters are found at the top of the screen. You may either double click on an entry, Order ID or “More Details” to review a particular Order or Item Detail.



“Order History” is the first option of the Payment History module. Here you can view, refund or void complete orders made by customers.



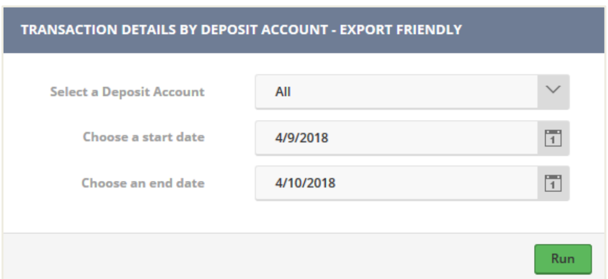
“Item History” is the second option and shows the individual items purchased by customers. Here you can view the purchasing trends for individual items, departments and deposit accounts. You can customize how the data displays by clicking the edit icon ( ), which you will find located in the right corner of each column header.

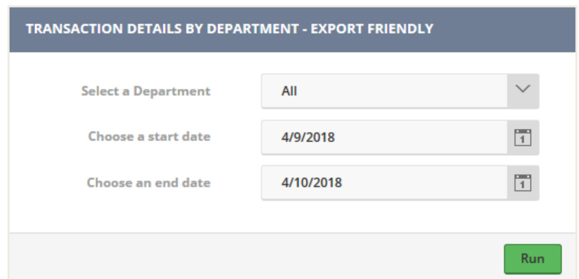
Reporting

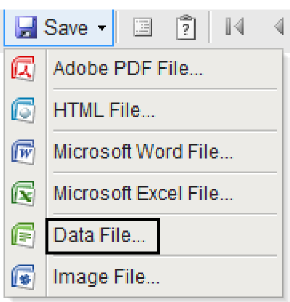
Reporting is an important feature in your RevTrak Portal. All Users can access reports, and with the "Job Title" feature you, as a Super User, can indicate which ones.

To generate reports, click "**Reports**" in your Navigation bar. It is the fourth option. The reports available to your access level will then generate. You may also narrow the results shown by typing a search into the filter bar such as "item" or "deposit."

Exporting Reports as a CSV File







To export a report as a CSV file, select a report from the list. Make your report selections, such as department or date range and select "**Run**." After the report has generated, you will have the option to save the report. Click "**Save**" and select "**Data File**" from the drop down menu – the report will generate and save as a CSV file.

Voids and Refunds

Please note: Basic Users do not have security permissions to refund or void a transaction. Speak to your administrator if you believe you should have refund/void privileges.

Void: Voids stop a transaction from settling with a cardholder's bank. A void must be processed prior to 7:00 PM Central Time on the same day of the transaction. Pending transactions may remain on card holder accounts for approximately three to five business days.

Refund: Refunds return funds for a given transaction back to the original cardholder's account. There are no time restrictions on refunds. Both the debit and credit will be listed on the cardholder's card statement. Refunds are credited back to the original cardholder's account in approximately three to five business days.