RevTrak Portal Power User Guide



Contents

Dashboard Navigation
Processing an Order Entry Transaction
Selecting a Customer
Adding Items to the Shopping Cart4
Checking Out4
Receiving Payment Confirmation5
Pre-Authorizing a Card Account5
Processing an Order Entry Transaction for an Item with Account Linking
Payment History7
Reporting
Contacts9
View/Edit Contacts9
Voids and Refunds

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 review item history and order history.

Deposit reports and transaction details may be reviewed under "Reports."

You can also use the "Contacts" tab to access order details for a specific customer, as well as review and edit their account information.

Within "Settings", you will be able to review your sales tax and edit pages.

"Inventory" is where your Web Store's current offerings are managed. Please contact your Client Service Representative if you would like to add or edit Web Store items.

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

Express Contact 31	1477						
L CUSTOMER - CHANGE Express Contact 31477	Cancel © Express Q Filter Abrunzo , Georgia 999 Mockingbird Lane, Jffffff						
	Akkerman , Juan 1679 Summerset Lane, Cedarville Andrews , Georgia						
L CUSTOMER - CHANGE Express Contact 31491	Cancel Express John doe John 1234 Main Street, Happy Valley Doe, John B88 East St. Bloomington						
L CUSTOMER - CHANGE John Doe 19513 1234 Main Street Happy Valley , MN 12345	Lhange Credit Cards John Doe #19513 FName John LName Doe						

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

All Inventory 🕶						
Q Filter						
L CUSTOMER - CHANGE John Doe 19513 1234 Main Street Happy Valley , MN 12345	Art Supplies = #artsupplies Cost \$10.00					
1 Art Supplies \$0.0	Quantity					
	Enter Students Last Name and ID number: Doe, 1234					
	X Cancel Save					

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

Item Name	Quantity	Cost	Item Total
Art Art Supplies	1	\$10.00	\$10.0
CLICK TO	ENABLE CARD F	OREADER	rder Total: \$10.0
CLICK TO I	ENABLE CARD F	OREADER	order Total: \$10.0
CLICK TO I Credit Card Payment Info Credit Card Number:	ENABLE CARD F		order Total: \$10.0
CLICK TO I	ENABLE CARD F Cardholder Name: Robert Doe	O READER Expires:	rder Total: \$10.0
CLICK TO I	ENABLE CARD F Cardholder Name: Robert Doe	O READER Expires:	rder Total: \$10.0

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 Order # 1234 East Bloomington Freeway Order # Bloomington, MN 55406 4/10/2018 10:						Receipt rder #29236004 18 10:33:21 AM
Robert Doe						
SKU	PRODUCT DESCRIPTION	ON		PRICE	QTY	TOTAL
ARTsupplies	Art Supplies Comment: doe, 1234			\$10.00	1	\$10.00
				<u>c</u>	ubtotal	\$10.00
					Total	\$10.00
Payment Info						
CARDHOLDER I	NAME	NUMBER	TYPE	AUTHORIZ	ZATION	RECEIPT NO.
Robert Doe		XXXX XXXX XXXX 1111	Visa	1234	57	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).

L CUSTOMER - C John Doe 19513 1234 Main Street Happy Valley , MN 12345	HANGE ART (0)	L Change Credit Cards John Doe #19513 FName John
Pre-Authorize Credit Authorization Info: Credit Card Number: Nickname (Optional) Authorize	Card	Expires: Month Vear V

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.

AP Exam Spanish
Student
Samuel Doe
+
Student Last Name *
Student ID *
★ Cancel ✓ Save

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.

Revite Connexes compare	Order History Your School Here						
EXPORT TO EXCEL							
ORDER ID	ORDER DATE 🗸		TOTAL	LAST NAME			
	E	1	$\hat{\mathbf{v}}$	Y			
31379021	03/21/2018		\$36.22	Smith			
36130018	03/15/2018		\$517.45	Mullenbach			

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

Revite Item History Your School Here								
EXPORT TO EXCE	EL							
	ORDER =	ORDER DATE 🗸 🔻	ITEM NAME 👳	PAYEE LAST NAME	PAYEE FIRST NAME	PAYEE ID 👳		
		1	Y	Ŧ	T			
VIEW REFUND	41176002	02/15/2018	Food Service	Adams	Arionna	290044		
VIEW REFUND	36198004	05/24/2017	Food Service	PITTS	DYLAN	12216		

"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."

TRANSACTION DETAILS BY DEPOSI	IT ACCOUNT - EXPORT FRIENDLY		TRANSACTION DETAILS BY DEPAR	TMENT - EXPORT FRIENDI	LY
Select a Deposit Account	All	\sim	Select a Department	All	\checkmark
Choose a start date	4/9/2018	1	Choose a start date	4/9/2018	1
Choose an end date	4/10/2018	1	Choose an end date	4/10/2018	1
					_
		Run			Run

Exporting Reports as a CSV File

	Save 🗸 📃 🄋 🛯 🖣
Ø	Adobe PDF File
Ø	HTML File
W	Microsoft Word File
R	Microsoft Excel File
e	Data File
٦	Image 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.

Contacts

In the "Contacts" module you can review customer accounts and create new ones, if necessary. You are able to look up a contact using first name, last name, phone, email, company name or import list.

View/Edit Contacts

Once you have located and selected the contact you would like to view, double click on their name. A screen will pop up where you can review their contact information, reset their Web Store password, look at a previous order or update credit card information that is on file.

Edit Contact				×				
Contact Details	Contact ID	20530						
Web Store	First Name							
Import Type	First Name	Robert						
Low Balance Emails	Last Name	Rosa						
Orders Placed	Company Name							
	Email	robert.rosa@revtra	k.com					
	Phone	(888) 847-3215						
	Address #1	888 Main Street	Edit Contact					
			Contact Details	OR	DER	DATE	AMOUNT	TOTAL
	Address #2		Web Chang	324	08157	10/10/17	\$75.00	\$77.62
	City	Farmington	web Store	324	08156	10/04/17	\$125.00	\$126.74
	State		Import Type	324	08155	08/24/17	(\$75.00)	(\$75.00)
	Zip	55068	Low Balance Emails	324	08154	08/24/17	\$236.00	\$238.44
			Orders Placed	324	08153	07/25/17	(\$10.00)	(\$10.00)
				324	08152	07/21/17	\$311.00	\$313.44
				324	08151	07/21/17	\$145.00	\$147.44
				324	08150	06/27/17	\$220.00	\$222.44

Voids and Refunds

Please note: Power Users do not automatically 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.