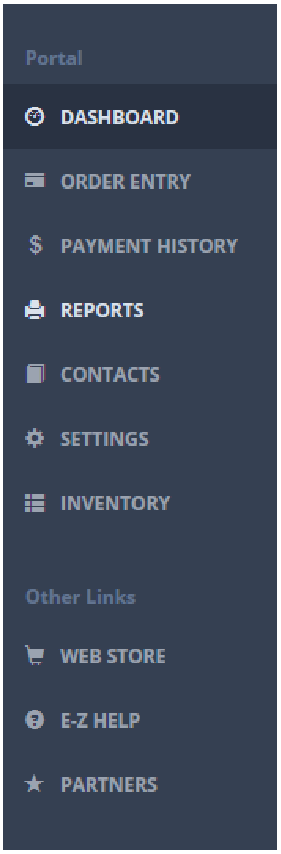
RevTrak Portal
Super User Guide

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 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.

Anything regarding the general set-up of the Web Store can be found under "Settings." Here, you will be able to review your global settings, update any import lists, modify reciept notes, review sales tax, edit pages, and assign User permissions.

"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.

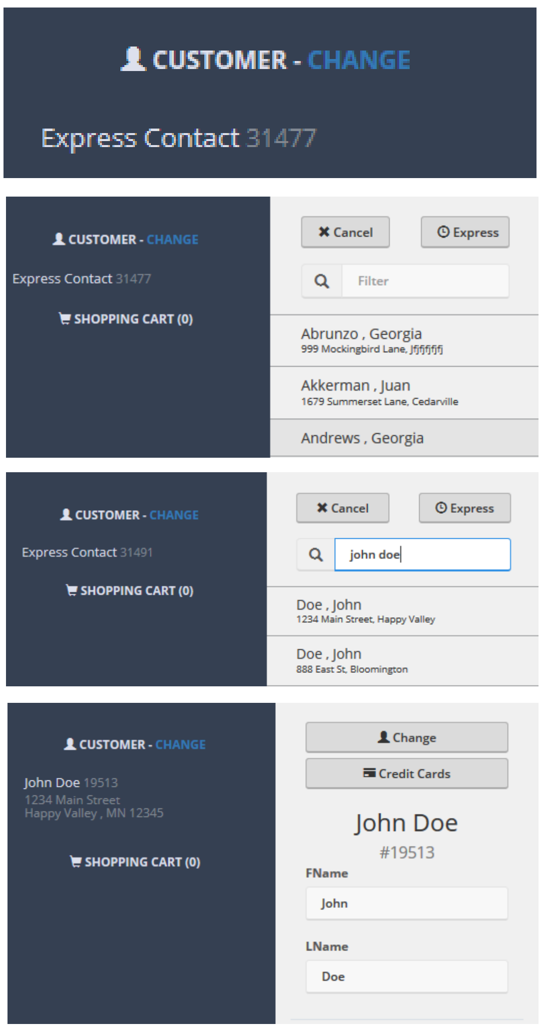
Under the heading "Other Links" are a few helpful links. You can view the "Web Store." There is also a link to "E-Z Help," which is where service requests can be entered and tracked. Knowledge Books and FAQs about the Web Store and Portal may also be accessed through E-Z Help.

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



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."

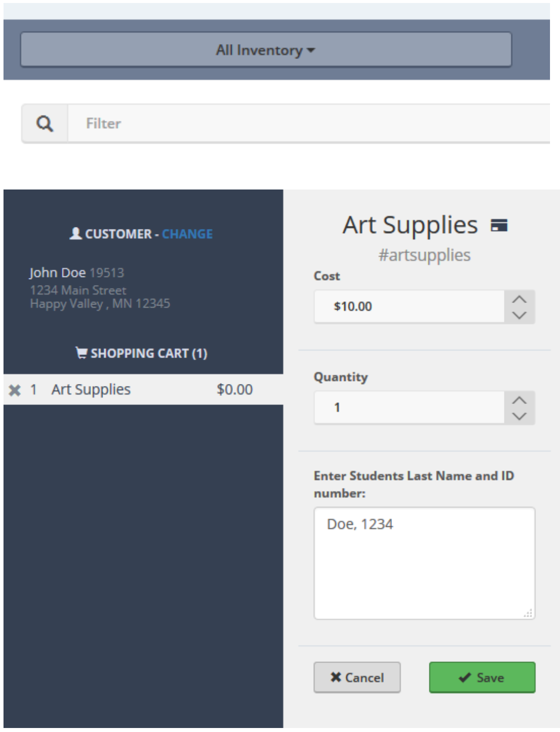
If you continue using an Express Contact for your Order Entry transaction, the customer will not be emailed their receipt at the end of the transaction.

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



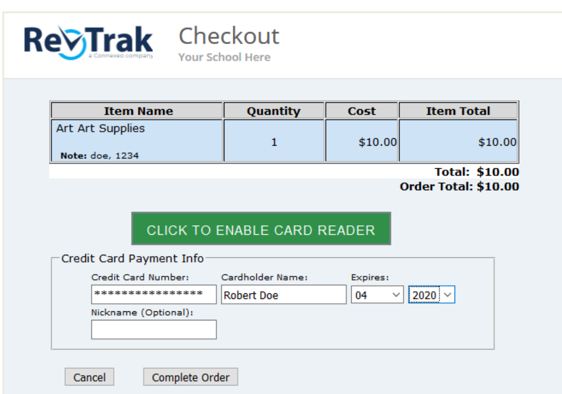
You can easily locate items by choosing an "Inventory" group from the dropdown menu. You may scroll through all items or search for the item by the item name in the "Filter" field. Click on the item to add it to the Shopping Cart.

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.

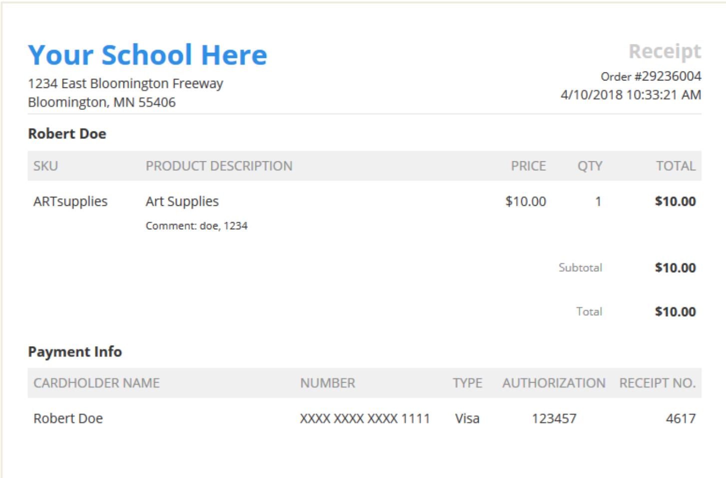
Checking Out



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

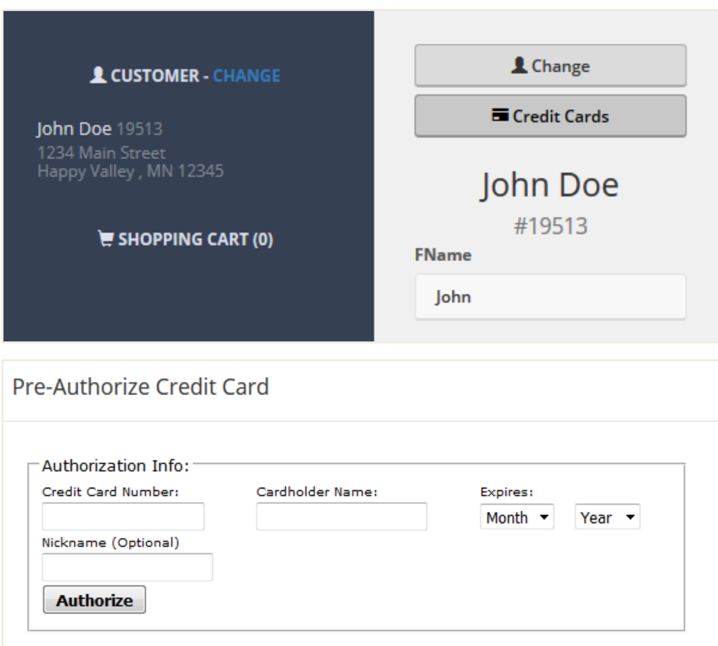


Once the transaction has processed, a receipt will display and can be printed for Card Present transactions. Customers who have a valid email address on file will also be emailed a receipt for their transaction.

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).

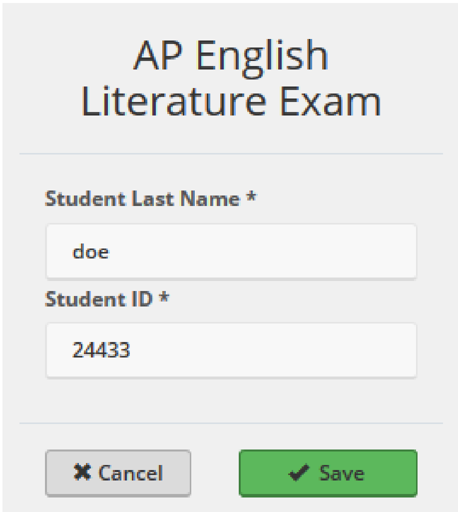
Pre-Authorizing a Card Account



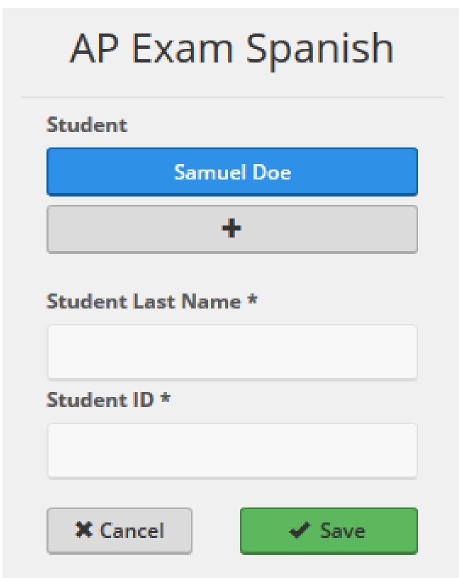
You may pre-authorize a customer's card for use with future payments. *This is optional.* First you will need to search for and select a customer. You will then click "**Credit Cards.**"

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.

Receipt Preferences and Masking Account Numbers for Order Entry

There are a number of features for Order Entry that can be accessed through "Global Settings." Note: Only Users with access to "Global Settings" will be able to view or edit these settings.

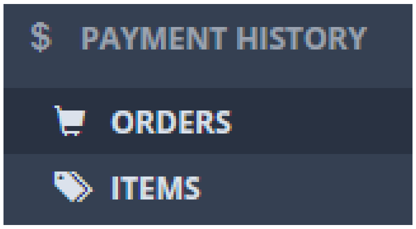
To access "Global Settings" first click "**Settings**" in your navigation bar. "Global Settings" will be the first option in the drop-down menu. Scroll down to the bottom of the Global Settings page and you will find the Order Entry options under the "Web Store Color Options" header.

Masking card account numbers while processing in-person Order Entry payments is an important security feature that will put your customers more at ease- you may mask the account numbers by checking the box.

For "Receipt Presentation," you may choose to select "**Always**," which will always generate a receipt after an order is processed, "**Never**," which will never generate a receipt for an order, or "**On Card Present**," which will generate a receipt for those transactions in which the card information is swiped using a card reader.

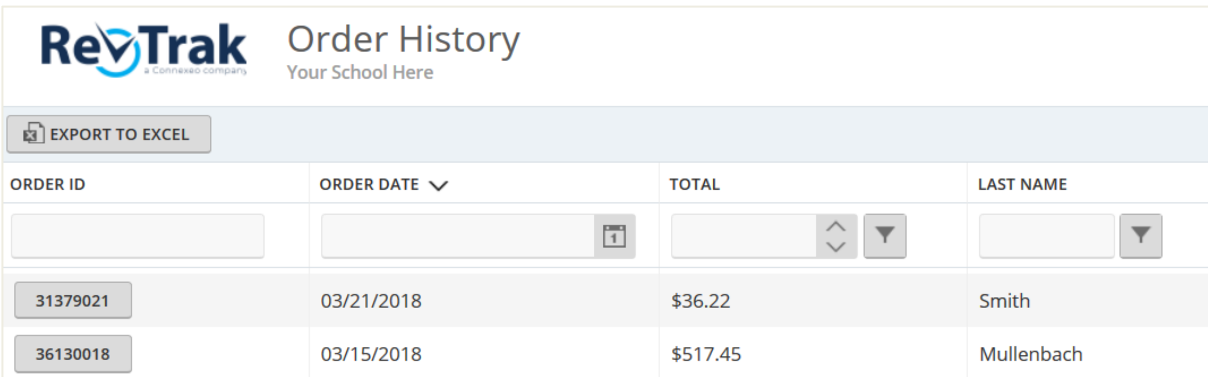
"Default Receipt Format" refers to the type of receipt printer you are utilizing. The default setting will be "Wide," which generates a standard paper sized receipt (8.5" x 11"). Select "**Narrow**" for the best option for ribbon style receipt printers.

Payment History

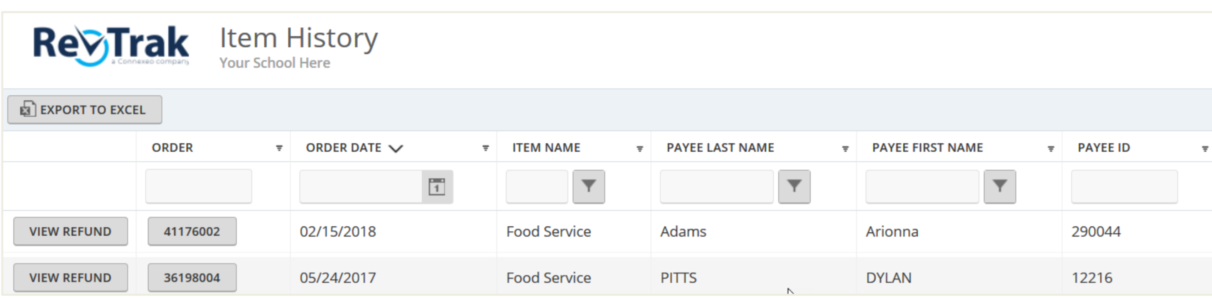


You can use “Payment History” to view both Order and Item History for purchases made through your Web Store and Order Entry.

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.



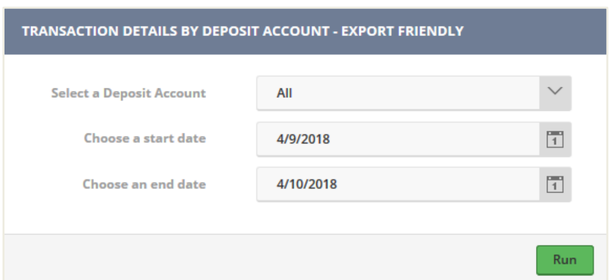
“**Item History**” is the second option and shows the individual items purchased by customers. Here you can view the purchasing trends for individual items, departments and deposit accounts. You can customize how the data displays by clicking the edit icon (which you will find located in the right corner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

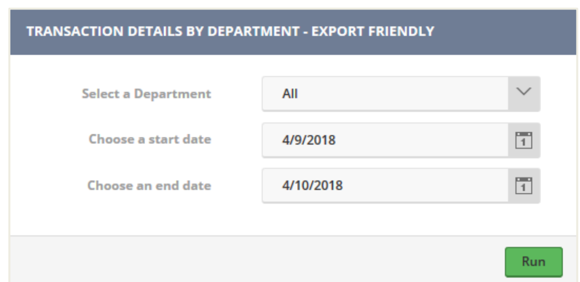
Reporting

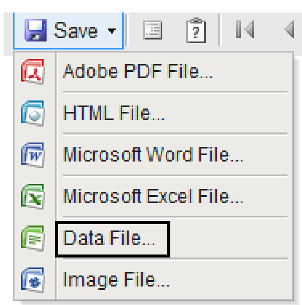
Reporting is an important feature in your RevTrak Portal. All Users can access reports, and with the "Job Title" feature you, as a Super User, can indicate which ones.

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







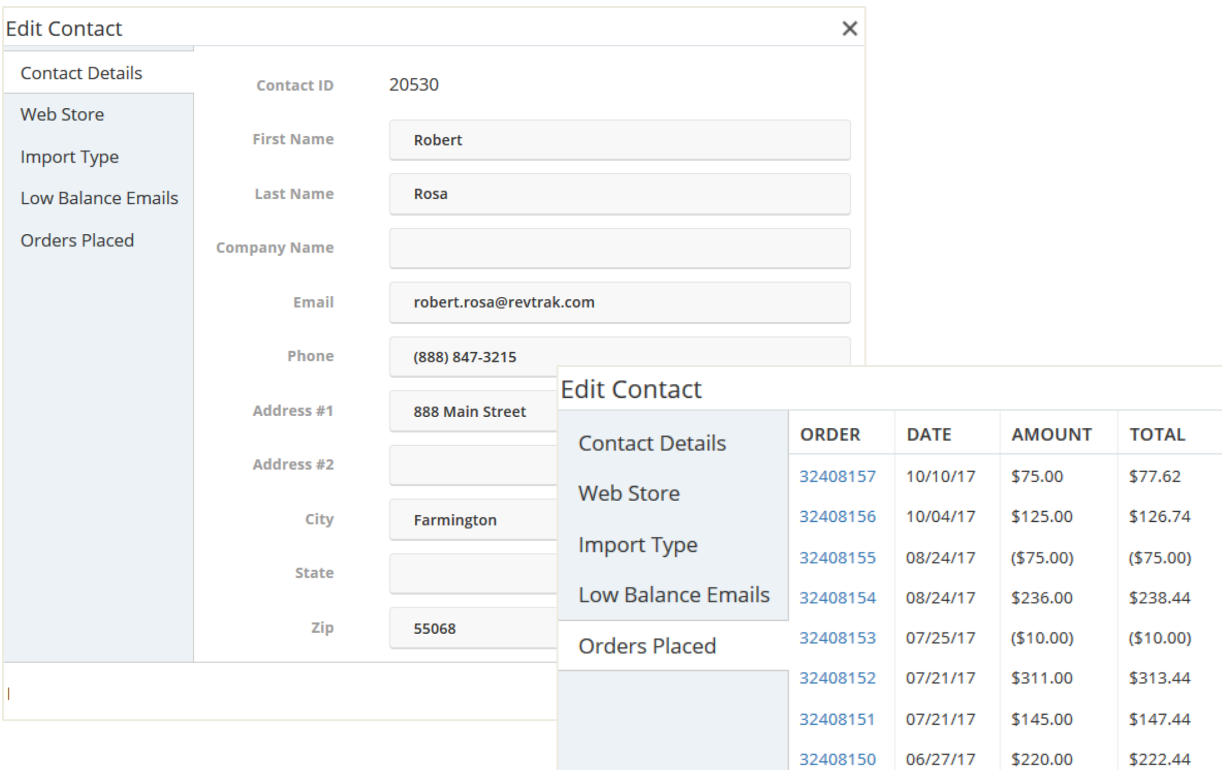
To export a report as a CSV file, select a report from the list. Make your report selections, such as department or date range and select "**Run**." After the report has generated, you will have the option to save the report. Click "**Save**" and select "**Data File**" from the drop down menu – the report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

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.

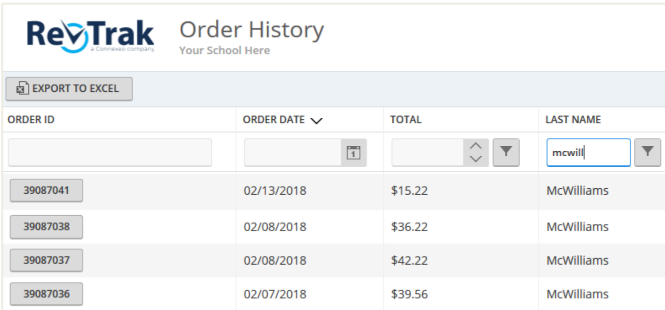


Voids and Refunds

Void: To 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.

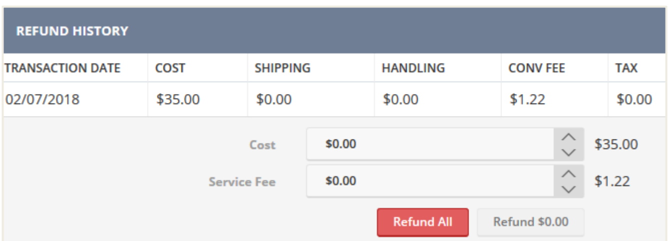
Refund: To return funds for a given transaction back to the original cardholder's account. There are no time restrictions on refund requests. Both the debit and credit will be listed on the cardholder's card statement. Refunds are credited back to the original cardholder's account in approximately three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

Locate the Transaction



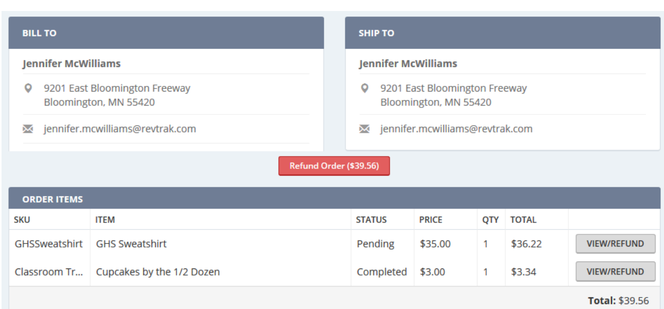
After opening "Order History" (the first option under "Payment History"), you will be able to look up the transaction using either the customer's name or the order ID. Locate the transaction to be refunded and click the Order ID to begin your void or refund.

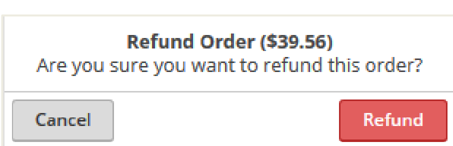
Partially Refund a Transaction



On the transaction detail, you will note "View/Refund" displayed next to each item purchased. Click the appropriate "**Refund**" button. Once you are brought into the refund screen, you may enter the refund amount. Review the amount displayed on the partial refund button. Select the appropriate button to complete your refund.

Fully Refund or Void a Transaction



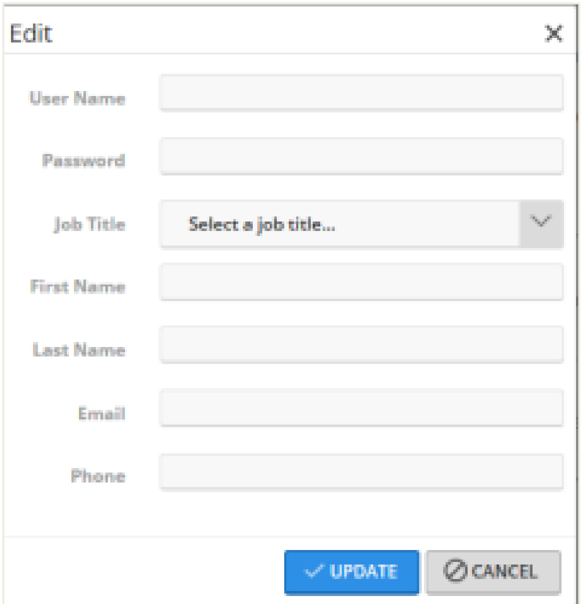


Select the red "**Void/Refund Order**" or "**Refund Order**" button and then confirm the refund by clicking "**Refund**". The screen will refresh and you will be able to view the void or refund.

Please note, refunds and voids may not post back to integration software. Accounts may need to be manually adjusted for refunds and voids. Your Client Service Representative can answer questions related to the posting of refunds or voids to your integration software.

User Accounts

RevTrak Portal User Accounts



Access the RevTrak Portal User feature to add or edit a user's account (user name, password, etc.) and user's privileges. "Users" may be found under the "Settings" option on your navigation bar.

Add a New RevTrak Portal User

To add a new user, click the "**Settings**" button and select the "**Users**" option. Next click "**New User**" at the top left of the screen. A blank "Edit User" prompt will display. Enter a user name, password and contact information for the new user. Using the "Job Title" editor, select the privileges for the new user. Click "**Update.**"

User names and passwords will not automatically be sent to the new user. Please provide the new user with a RevTrak Portal link as well their log-in credentials.

Edit a Current RevTrak Portal User

To edit a current user, click the "**Settings**" option and select "**Users**." Next click on the user name in the "**User List**" (use "**Filter**" to search the "User List" for a user.) You may either double click on the user's name or click on the "**Edit"** button to display the "**Edit User**" prompt screen. The user's existing information will display. Please note that it is not possible to view a user's password, but the "Edit User" screen can be used to reset the password. Edit the user's account information or "User Privileges" and click "**Update**."

		Global Control	Supervisors	Product Builders	Order Takers
Portal Access	**Select**	**Super User**	**Power User**	**Standard User**	**Basic User**
Portal Users	Add new users	√			
	Edit Login & password	√			
Order Entry (OE)	Process OE Payments	√	√	√	√
Order Management	View	√	√	√	√
	View Transaction History	√	√	√	√
	Refund/Void	√			
Legacy Reports	View & Drill Down	√	√	√	√
Reports	View & Drill Down	√	√	√	√
View / Edit Contacts (Web Customer or Import List)	Edit Contact Information	√	√		
	Edit Login & password	√	√		
	Edit Import Type	√	√		
	Edit Contact Type	√	√		
	View past orders	√	√		
	Refund/Void	√			
	Create New contact	√	√		
View / Edit Portal Users	View User List	√	√		
	Add / Edit User Account	√			
Changes	Edit / Mass Inventory Update	√	√	√	
Inventory	Edit / Add	√	√	√	
Account Codes	Edit / Add	√	√	√	
Departments	Edit / Add	√	√	√	
Groups	Categories	√	√	√	
Modifiers	Edit	√	√	√	
Units	Edit / Add	√	√	√	
Receipt Comments	Edit / Add	√			
Pages	Edit / Add	√	√	√	
Sales Tax	Edit / Add	√	√		
Import List	Edit / Add	√			
Global	Edit	√			