

Portal Basic User Guide



Contents

- RevTrak*[®] Portal Browser & System Requirements2
- Dashboard Navigation.....2
- Processing an Order Entry Transaction.....3
 - Selecting a Customer3
 - Adding Items to the Shopping Cart.....4
 - Checking Out.....4
 - Receiving Payment Confirmation5
 - Pre-Authorizing a Card Account5
- Processing an Order Entry Transaction for an Item with Account Linking6
- Payment History.....7
 - Order History.....7
 - Item History7
- Reporting.....8
 - Exporting Reports as a CSV File.....8

RevTrak® Portal Browser & System Requirements

Internet Explorer*

- Version 10
- PC – Windows XP, Windows Vista, Windows 7 or Windows 8

Safari

- Versions 6, 7, 8
- Mac – OS X 10.8, 10.9, 10.10

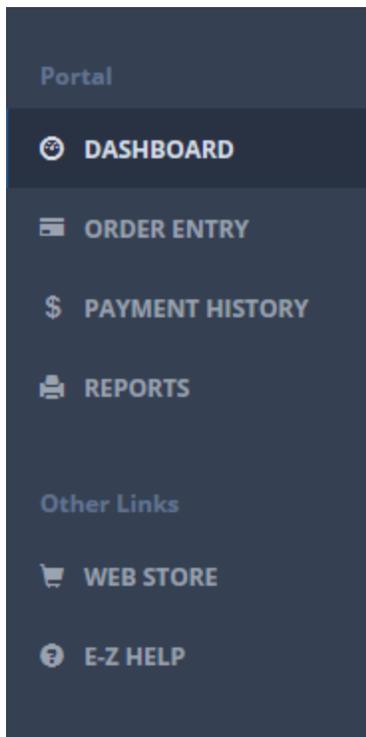
Firefox

- Versions 42+
- PC – Windows 7 or Windows 8
- Mac – OS X 10.8, 10.9, 10.10

Google Chrome

- Versions 46+
- PC – Windows 7 or Windows 8
- Mac – OS X 10.8, 10.9, 10.10

Dashboard Navigation



The Portal navigation bar is found on the left side of the screen. You will use this to navigate through the Portal.

Select “**Dashboard**” to access the **RevTrak®** Portal home page.

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.”

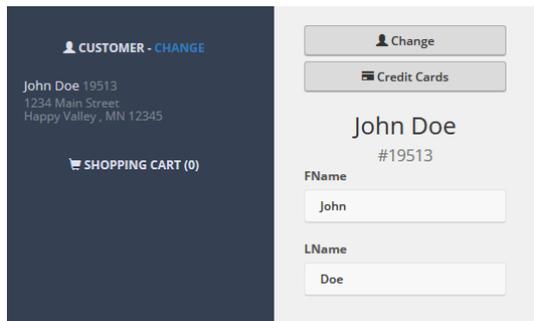
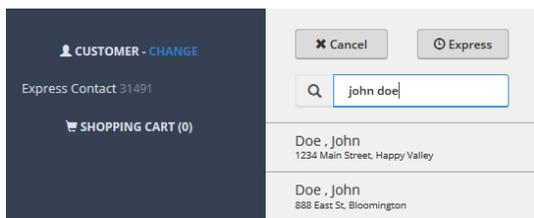
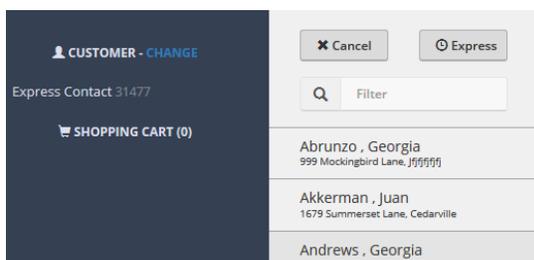
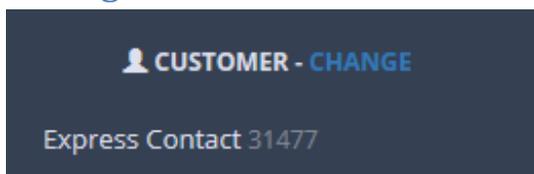
Under the heading “Other Links” are a few helpful links. View the “Web Store.” There is also a link to “E-Z Help,” which is where service requests can be entered and tracked. Knowledge Books and FAQs about the Web Store and Portal may also be accessed through E-Z Help.

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 integrates with existing accounts within your Web Store. 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 customer name, 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

The screenshot shows a web interface for adding items to a shopping cart. At the top, there is a dropdown menu labeled 'All Inventory' and a search bar labeled 'Filter'. Below this, the main content area is titled 'Art Supplies' with a sub-header '#artsupplies'. On the left, there is a customer profile for 'John Doe' and a 'SHOPPING CART (1)' section showing '1 Art Supplies' for '\$0.00'. The main form has a 'Cost' field set to '\$10.00', a 'Quantity' field set to '1', and a text input for 'Enter Students Last Name and ID number' containing 'Doe, 1234'. At the bottom of the form are 'Cancel' and 'Save' buttons.

You can easily locate items by choosing an “Inventory” group from the dropdown. 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 an item 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 selected are accurate and then proceed to Checkout.

Checking Out

The screenshot shows the checkout process. At the top, there is a table of items in the cart:

Item Name	Quantity	Cost	Item Total
Art Supplies <small>Note: Doe, 1234</small>	1	\$10.00	\$10.00
Athletics AP Art History Exam	1	\$70.00	\$70.00
Chess Club <small>Note: Doe, 1234</small>	1	\$45.00	\$45.00

Below the table, the totals are displayed: Total: \$125.00, Service Fee: \$4.36, Order Total: \$129.36. There is a link for 'Pay with eCheck'. Below this is a 'Credit Card Payment Info' form with fields for 'Credit Card Number', 'Cardholder Name' (John Doe), and 'Expires' (07/2017). There is also a 'Nickname (Optional)' field. At the bottom, there is a checkbox for 'Save this card' and 'Cancel' and 'Complete Order' buttons.

If the customer is currently a Web Store customer, you will have the option to process the payment 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

School Name
1234 East Bloomington Freeway
Bloomington, MN 55406

Receipt
Order #19056078
11/20/2015 1:40:59 PM

John Smith
10700 Lyndale Ave
Minneapolis, MN 55406

SKU	PRODUCT DESCRIPTION	PRICE	QTY	TOTAL
Boys Hockey 2015	Boys Hockey	\$450.00	1	\$450.00

Name: John Smith (21255)
Address: 10700 Lyndale Ave Minneapolis, MN 55406
Email: John.Smith@RevTrak.com
Phone: 555-888-9999
Comment: Tuesdays

Subtotal	\$450.00
Tax	\$0.00
Shipping	\$0.00
Handling	\$0.00
Svc. Fee	\$15.71
Total	\$465.71

Thank you for shopping with us. We hope to see you again! Thank you for shopping!

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, you may click “**Print Friendly Receipt**” (on the upper right of the screen) to display the receipt.

Pre-Authorizing a Credit Card

CUSTOMER - CHANGE

John Doe 19513
1234 Main Street
Happy Valley, MN 12345

SHOPPING CART (0)

Change

Credit Cards

John Doe
#19513

FName
John

Pre-Authorize Credit Card

Authorization Info:

Credit Card Number: Cardholder Name: Expires: Month Year

Nickname (Optional)

Authorize

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. Complete the forms with the information provided, and then click “**Authorize.**” You will receive an approval message stating the authorization has been processed. The card account information will now be saved for future purchases.

Processing an Order Entry Transaction for an Item with Account Linking

Last Name *

Account found successfully.

ID Number *

Account

+

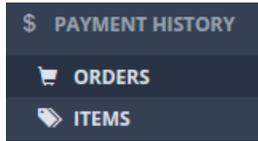
Last Name *

ID Number *

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 future transactions.

Payment History



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

When reviewing both Item History and Order History, you are able to filter orders by a number of qualifiers such as Order ID or Order Date. 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

The screenshot shows the 'Order History' page in the RevTrak Portal. At the top left is the RevTrak Portal logo and 'Kim's Demo'. Below the logo is an 'EXPORT TO EXCEL' button. The main area contains a table with columns: ORDER ID, ORDER DATE, TOTAL, and PURCHASER. The ORDER DATE column has a dropdown menu and two date input fields: 'Start: 10/13/2015' and 'End: 11/13/2015', each with a calendar icon. The ORDER ID, TOTAL, and PURCHASER columns have dropdown menus. The table is currently empty.

“Order History” is the first option of the Payment History module. Here is where you can review the complete orders made by customers.

Item History

The screenshot shows the 'Item History' page in the RevTrak Portal. At the top left is the RevTrak Portal logo and 'Kim's Demo'. Below the logo is an 'EXPORT TO EXCEL' button. Below that is a text prompt: 'Drag a column header and drop it here to group by that column'. The main area contains a table with columns: PURCHASE ID, ORDER DATE, ORDER NUMBER, QUANTITY, COST, TOTAL, DEPARTMENT, DEPOSIT ACCOUNT, and SKU. The ORDER DATE column has a dropdown menu and two date input fields: 'Start: 10/13/2015' and 'End: 11/13/2015', each with a calendar icon. The PURCHASE ID, ORDER NUMBER, QUANTITY, COST, TOTAL, DEPARTMENT, DEPOSIT ACCOUNT, and SKU columns have dropdown menus. The table is currently empty.

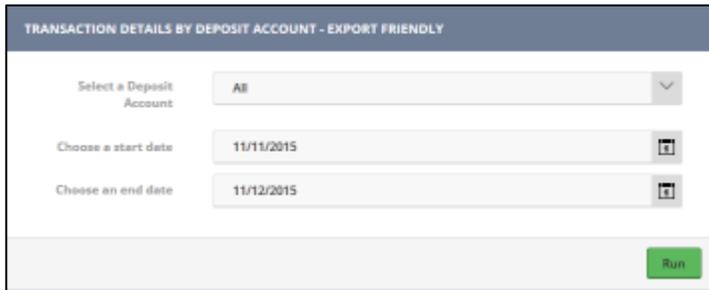
“Item History” is the second option and shows the individual items purchased by customers. Here you can review the purchasing trends for individual items, departments and deposit accounts.

Reporting

Reporting is an important feature in your **RevTrak**® Portal.

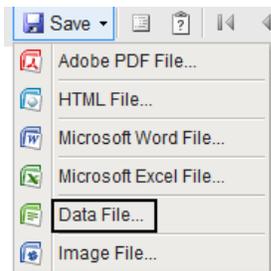
To generate reports, click **“Reports”** in your navigation bar. The reports available to your access level will then generate. You may also narrow the results by filtering by a keyword such as **“item”** or **“deposit.”**

Exporting Reports as a CSV File



The screenshot shows a web interface for generating reports. At the top, it says "TRANSACTION DETAILS BY DEPOSIT ACCOUNT - EXPORT FRIENDLY". Below this, there are three input fields: "Select a Deposit Account" with a dropdown menu set to "All", "Choose a start date" with a date picker set to "11/11/2015", and "Choose an end date" with a date picker set to "11/12/2015". A green "Run" button is located at the bottom right of the form.

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.