



RevTrak Template Instructions

Download the template spreadsheet from our District website before following these steps

Instructions are listed by letters to align with the column letter on the template.

- A. Campus Name:** Enter the full name of your campus. For example, University High School.
- B. Item Name:** Name of the item you are selling. This is what will be displayed on the Web Store. IE: Band T-shirts, Library Fees, Choir Donations, etc.
- C. Item Description:** Enter the text that you want to be shown once your item has been clicked on. It can be used to describe what the item is for. IE: what the donation will be used for, meal menu, or an event schedule, etc.
- D. Price:** List the amount you want to sell the item for. The amount can be a flat cost or an open amount. If it is for a donation you may want to leave it open.
- E. Reporting Department:** Enter your Activity Group name. For example, Band. If you are selling an item for the whole campus (your local option is 000), enter your Campus name.
- F. Account code:** Enter your complete activity revenue budget code number. Use this format but fill in the blanks 461.00.57 __. __. __.00. __. __. (If a Fundraiser, this account should match the Fundraising Permission Request form).
- G. Bank Deposit Account:** If you are a campus or student group, enter "Activity Account". If you are a Department, please reach out to the Accounting Revenue Specialist (Kim Pavlik) for further guidance.
- H. Service Fee Charged to customer:** Always enter "YES".
- I. Customer Details:** Enter the information you want to collect from the customer. For example, you might want the student name, ID#, etc. If you do not want any information please enter "N/A".
- J. Drop down modifier:** List options for the customer here. For example, list clothing sizes, grades, colors, etc. If not applicable, enter "N/A".
- K. Availability:** Enter a numerical date range. For example, the start date you want your item to go live and the end date for when the item should go inactive. Do not enter a start date that has already passed. The start date must be at least 7 business days ahead of the date you are submitting the template. **DO NOT ENTER THE START DATE OF "ASAP" AND/OR THE END DATE OF "END OF THE SCHOOL YEAR".**
- L. System:** Enter where you want the item to be accessible from.
You have (3) choices:
 - Enter **"Web Store"** for online sales only.
 - Enter **"Order Entry"** for in person sales with a credit card reader only.
 - Enter **"Both"** if you want web store and order entry sales.
- M. Email Notification:** Enter the sponsor's email and the campus secretary/bookkeeper's email. In order to have your email entered you must have a RevTrak login account. If you don't have a RevTrak account, please contact the Accounting Revenue Specialist, Kim Pavlik.

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N. Related notes: List any additional details not covered in the other columns. For example, if you'd like the item to be built similar to other t-shirt sales, donation, etc. Or, if you'd like to charge the customer sales tax.

Next, email the RevTrak Template to the secretary/bookkeeper. She/he will verify that there is an approved fundraiser and all of the information is correct. Once verified, the secretary/bookkeeper will send the template to the accounting revenue specialist.

Items that the secretary/bookkeeper needs to send to the accounting revenue specialist:

- RevTrak Template, with all columns completed and in .xlsx Excel format (not Google Sheets).
- Approved Fundraising Permission Request form (if a Fundraiser).

Emailing incomplete or incorrect templates will delay the process of having your item added to RevTrak. As will not sending the template back in the correct .xlsx Excel format.

Q & A:

Q: Can the RevTrak Template be used for Vanco Events as well?

A: No, this template is only for RevTrak, not Vanco Events.

Q: Can I email the RevTrak Template before my Fundraiser has been approved?

A: No, unapproved fundraisers will not be set up on RevTrak. In order to have your item listed on RevTrak, email the RevTrak Template along with the Approved Fundraising Permission Request form.

Q: When do I have to fill out the RevTrak Template?

A: If you want to collect money through RevTrak, you need to fill out the template. If you had the exact item last year and just want to have it reopened, send an email stating which item and date range you would like to have reopened.

Q: How many items can I list on per each RevTrak Template?

A: Only (1) fundraiser, event, course cost, etc. per template. For example, if you have (2) fundraisers, Concession Sales and Choir Armbands, you would need to fill out (2) templates.

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Q: How do find the RevTrak Template?

A: The RevTrak Template is located on the Waco ISD Webpage under the Department for Business & Financial Services.

1. Click on "Departments" on the Waco ISD Webpage.
2. Click on "Business & Financial Services".
3. On the left-hand side click on: "Forms and Resources".
4. Click on "Activity Fund".
5. Click on "RevTrak Template" and the template will download.