Portal
Power User Guide

RevTrak
Saving You Time

Contents

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

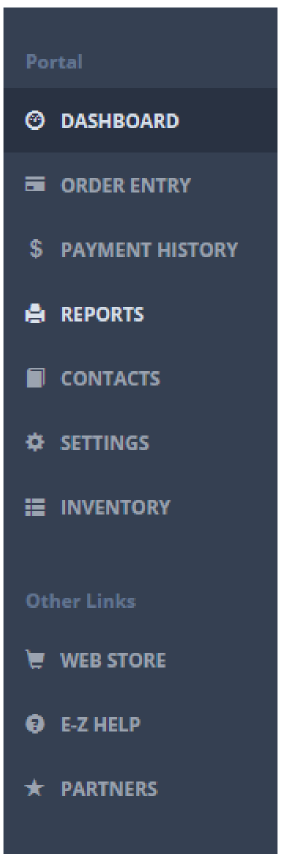
Firefox

- 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. As the name implies, 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 specfic 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 you 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.

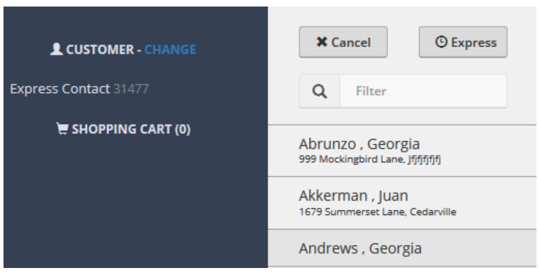
Under the heading "Other Links" are a few helpful links. View the "Web Store." There is also a link to "E-Z Help," which is where service requests can be entered and tracked. Knowledge Books and FAQs about the Web Store and Portal may also be accessed through E-Z Help.

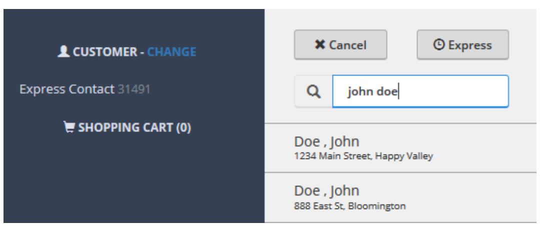
Processing an Order Entry Transaction

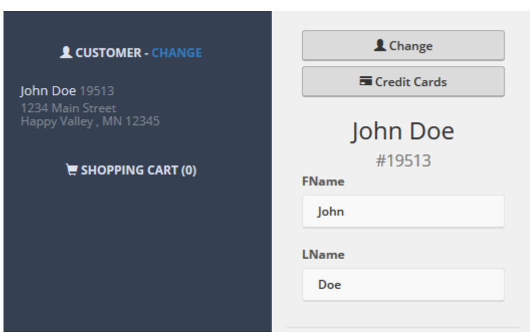
Order Entry allows you to collect in-person, phone-in, and mail-in payments. You must be logged in to the ***RevTrak***® Portal to use Order Entry. Please note that Internet Explorer is the required browser to use a card reader with Order Entry.

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

Selecting a Customer







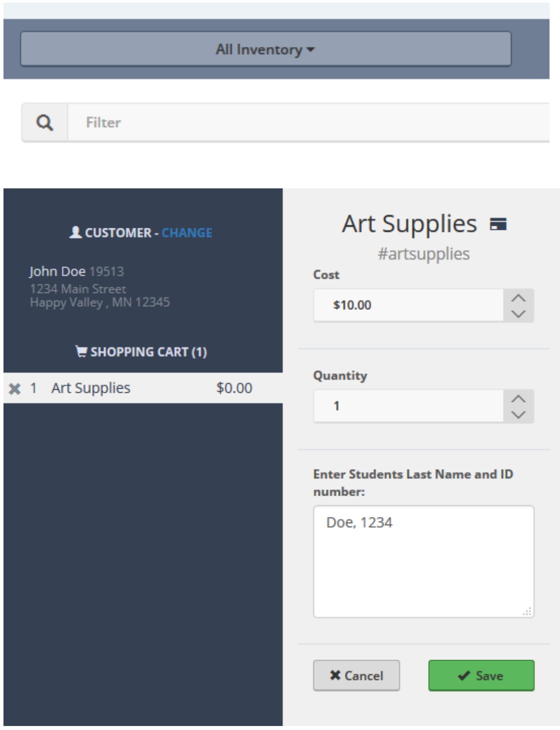
To take an in-person payment, you first need to indicate who you are receiving the payment from. The default setting will indicate an "Express Contact." If you continue using an Express Contact for your Order Entry transaction, the customer will not be emailed their receipt at the end of the transaction.

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 name the customer, 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



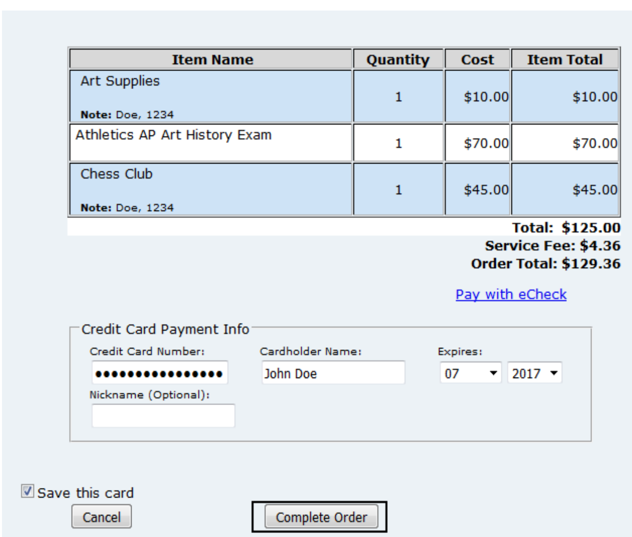
You can easily locate items by choosing an "Inventory" group from the dropdown. You may scroll through all items or search for the item by the item name in the "Filter" field. Click on the item to add it to the "Shopping Cart."

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.

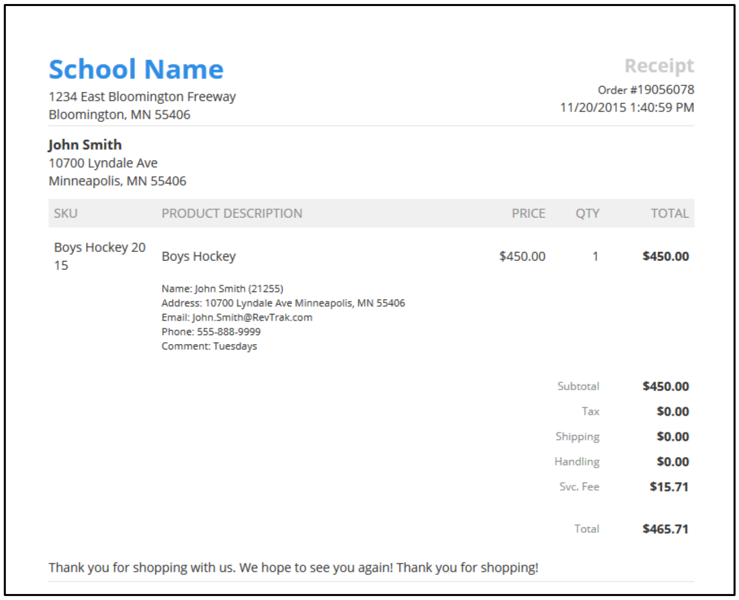
Checking Out



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



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 Name: John Smith (21255) Address: 10700 Lyndale Ave Minneapolis, MN 55406 Email: John.Smith@RevTrak.com Phone: 555-888-9999 Comment: Tuesdays	$450.00	1	**$450.00**

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

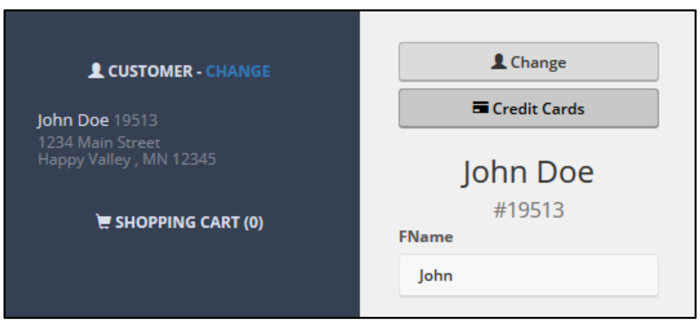
Thank you for shopping with us. We hope to see you again! Thank you for shopping!

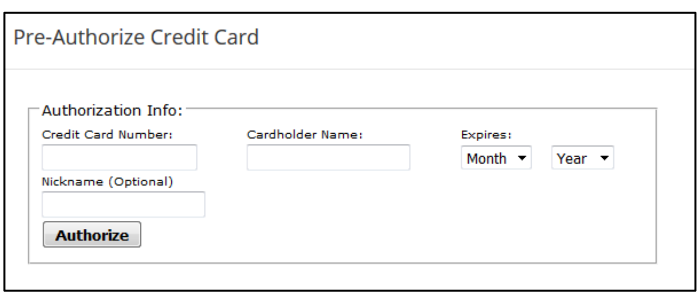
Once the transaction has processed, a receipt will display and can be printed for Card Present transactions. Customers who have a valid email address on file will also be emailed a receipt for their transaction.

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

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

Pre-Authorizing a Card Account

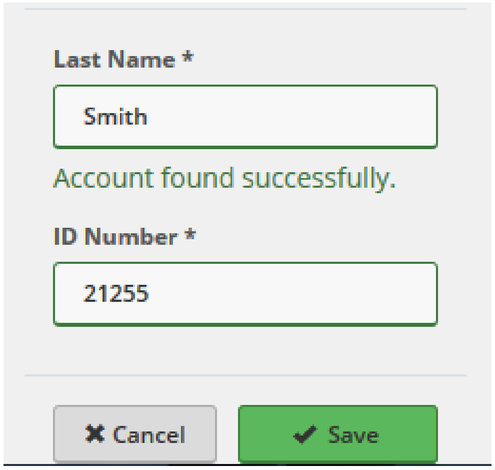


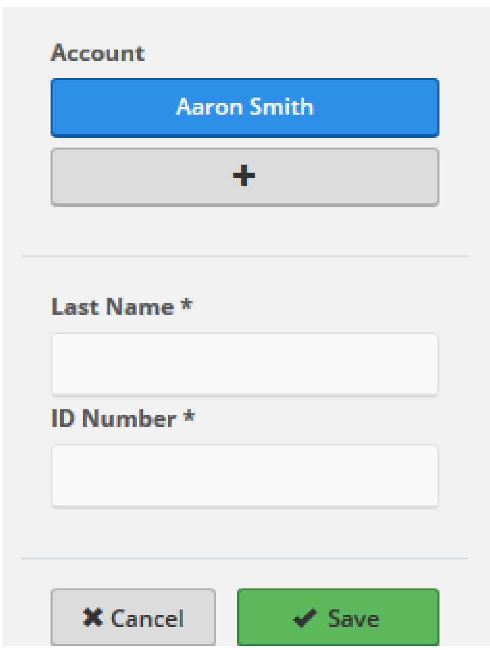


You may pre-authorize a customer's card for use with future payments. *This is optional.* First you will need to search for and select a customer. You will then click "**Credit Cards**."

Next, click "**Add New Card.**" The "Pre-Authorize Credit Card" screen will then appear. Complete the form with the information provided, then 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

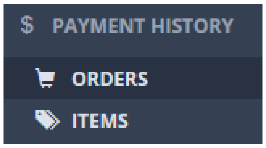




After selecting a customer (page 3), add an item to the cart (page 4). An item that uses Account Linking will have fields to enter the contact's last name and ID number. After completing the fields, click the "**Save**" button. The item will be placed into the cart. You may process the payment as usual.

The import list contact will be linked with the payor account for future transactions.

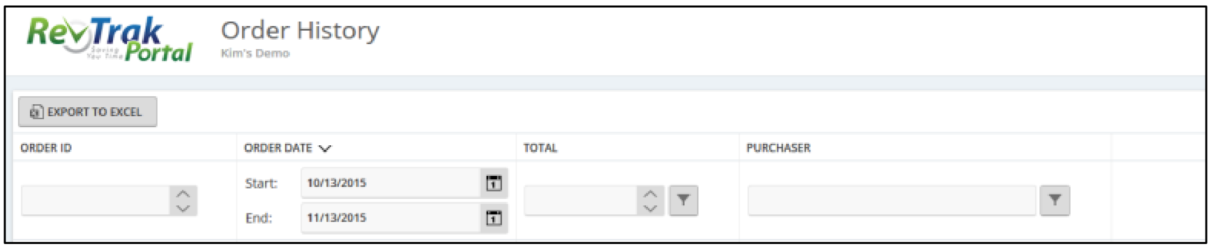
Payment History



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 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



"Order History" is the first option of the Payment History module. Here is where you can review the complete orders made by customers. You may also use this to look up an order so that you may refund or void it.

Item History

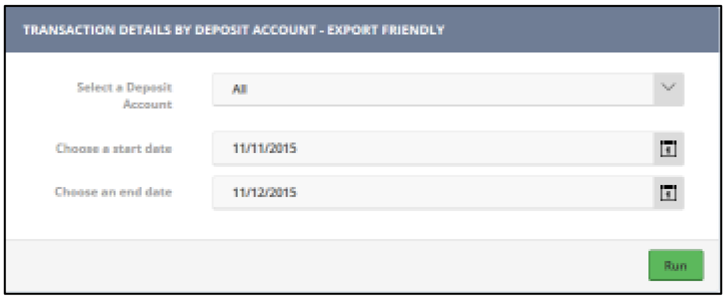
"Item History" is the second option and shows the individual items purchased by customers. Here you can review the purchasing trends for individual items, departments and deposit accounts.

Reporting

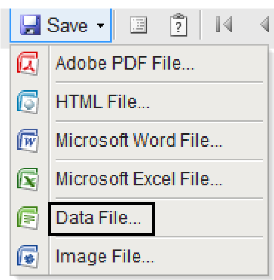
Reporting is an important feature in your ***RevTrak***® Portal functionality. All users can access reports and with the "Job Title" feature you, as a Super User, can indicate which ones.

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 their order history or review the credit card information that is on file.