# RevTrak Portal
# Basic User Guide

# Content

# RevTrak Portal System Requirements & Portal Overview

**Browser and System Requirements**

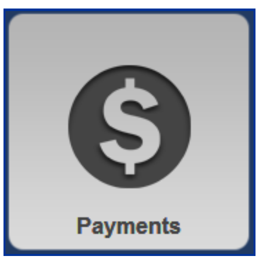
**Internet Explorer**
- Version 8 and higher
- PC – Windows XP, Windows Vista, Windows 7, or Windows 8

**Firefox**
- Version 18 and higher
- PC – Windows 7 or Windows 8
- Mac – OS X 10.7

**Safari**
- Version 5 or 6
- Mac – OS X 10.8

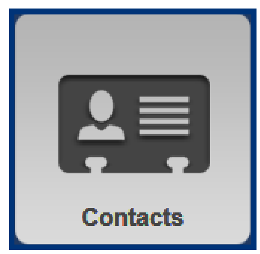
**Google Chrome**
- Version 20 and higher
- PC – Windows 7 or Windows 8
- Mac – OS X 10.7

| Home | Web Store | EZ Help | Partners | About |
|---|---|---|---|---|
| • Portal Home | • View Web Store | • Enter service requests<br>• Request changes/ additions to Web Store<br>• Access Knowledge Books<br>• FAQs<br>• Read What's New | • View integration partner list and documents | • System settings |




- Order Entry payments
- Order history
- Legacy reports


- Deposit reports
- Transaction reports



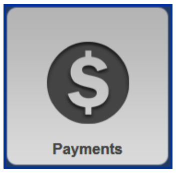

- No access


- No access


- No access


- No access

# Processing an Order Entry Transaction





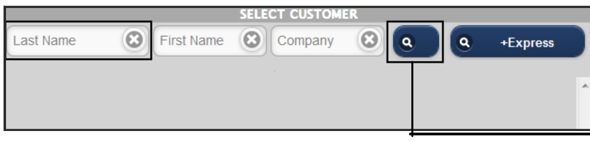
Open **a Web Browser**

- Log in to the RevTrak Portal
- Click Payments, then Order Entry for In-person, mail-in and phone-in payments

# Customer Information

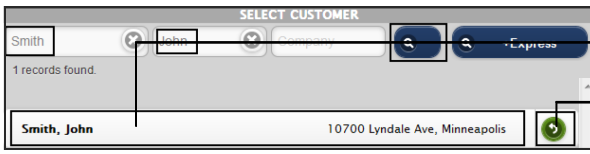

**Express Customer** Transaction (default)

- Customer account will not be created
- Transaction will not be linked to a customer's account




**Current Customer** Transaction

- Transaction will be linked to a customer's account and customer will receive emailed confirmation of their transaction
- Click **Change** to search for customer by first, last or company name
- Click on the **magnifying glass icon** to initiate your search

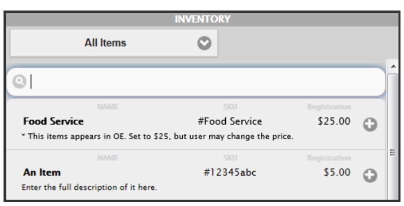



- Click customer to view/edit card account information
- Click arrow to select customer and return to Shopping Cart


**New Customer Transaction**

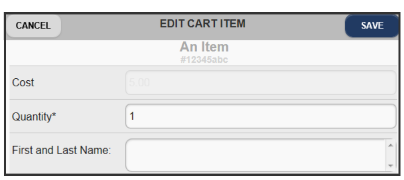

- Click **New** to add new customer
- To access the customer's account for future transactions, an email address must be added during customer set up

# Shopping Cart

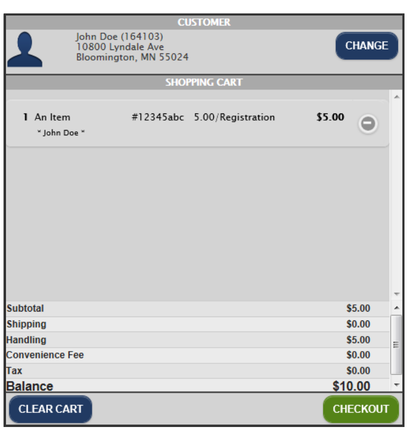



Add Item to Cart

- Locate items by selecting **Inventory** group, by scrolling through **All Items** list, or by typing all or part of the item name in the **Filter items** field
- Click on item to add to **Shopping Cart**



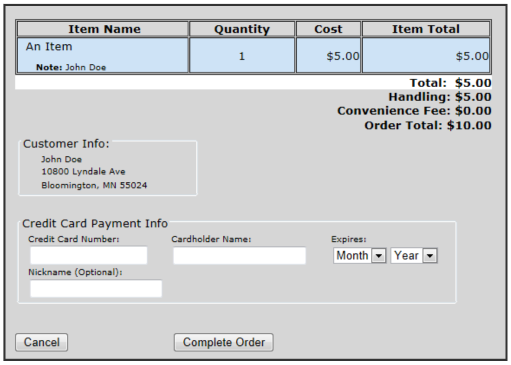

- Enter required information and click on the **Save** button




- Cart will display all items selected
- Click minus symbol to delete item from cart

- Confirm items in cart and click **Checkout**

## Checkout



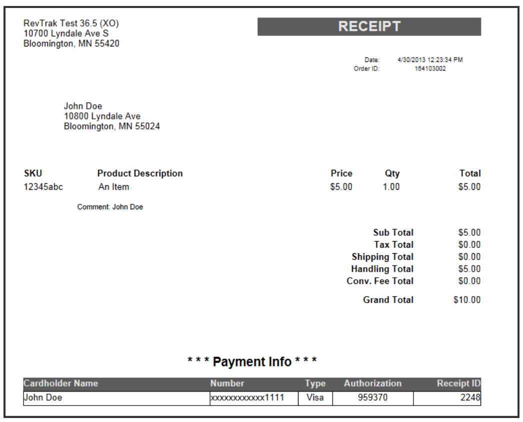

Click **Go to Checkout**

- If an existing customer was selected, you may have the option to **Pay with a previously used credit card**
  - ⇒ Select desired card and click **Complete Order**

**Note** A secure token is used to retrieve a previously used credit card. For security reasons, the system does not store the credit card number

- To use a new card, select **Pay with a different credit card**
  - ⇒ Enter desired card Nickname (optional) and swipe card or type payment information into appropriate fields

## Payment Confirmation

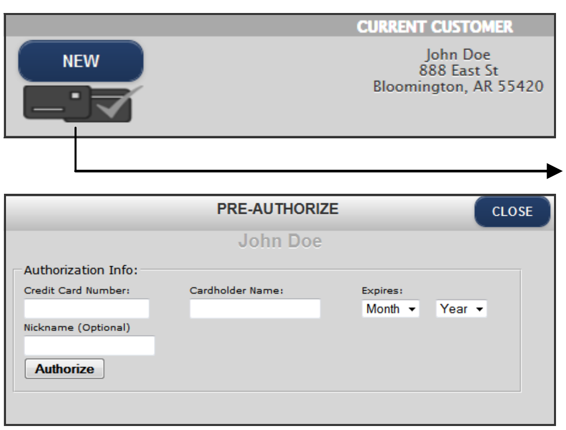



- If default print setting is selected in Global Settings, a Print Dialogue box will automatically appear (only for swiped card payments). Change **Number of Copies** to 2 and click **Print**
- If default print setting is not selected in Global Settings, click **Print Receipt—Letter Format** or **Print Receipt—Ribbon Format**. Select correct printer from drop-down menu, change **Number of Copies** to 2, and click **Print**

## Helpful Hints

- Small receipt printers require a different printing format:
  - ⇒ **Start**, **Printers & Faxes**, right click name of printer, **Properties**, **Advanced**
  - ⇒ Alternate choosing a setting and printing a Ribbon Receipt until best format is found

## How to Pre-Authorize a Credit Card (Optional)




Pre-authorize customer credit card for future payments (see p. 7 for more information)

- When editing a customer on the **Current Customer** screen, highlight the desired customer's name
- Click the credit card image to pre-authorize a card
- Enter cardholder information and Nickname (optional)
- Swipe credit card OR manually enter credit card information and click on the **Authorize** button
- Click **Close**

# Reports (See E-Z Help Knowledge Books: Chapters 22.1 - 22.4 for more info)


**Items by Department - Export Friendly**
Lists orders containing items for a given department, in a specified date range
New!

**Range of Receipts Report (RIBBON)**
A report for listing all receipts between two dates. Ribbon format.

**Range of Receipts Report (WIDE)**
A report for listing all receipts between two dates. 8.5 X 11 format.

**Fee Allocation Report**
Fee Allocation Report

**Orders by SKU**
Lists orders containing items for a given SKU
Now available, search by date!

**Items by Manufacturer**
Lists orders containing items for a given manufacturer, in a specified date range

**Orders by Manufacturer**
Lists orders for a given manufacturer, in a specified date range

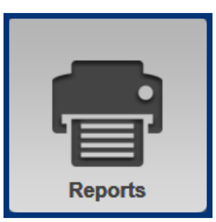
**Deposit Report By Date**
Deposit Report, grouped by date

**Deposit Report By Product**
Deposit Report, grouped by product

**Deposit Report By Account Code**
Deposit Report, grouped by account code

**Orders By Date**
A report listing all orders within a specified date range

# Legacy Reports




- These legacy reports are available through the current Reports screen (above)

- **Orders by Manufacturer**
  Transactions by manufacturer (department)
- **Orders by Date**
  Transactions by date
- **Orders by SKU**
  Transactions by SKU (unique code for each item)

**Note** These reports include transaction history and direct links to receipts

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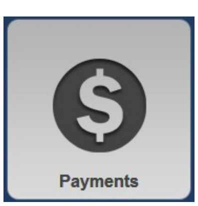


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- These legacy reports are available by clicking Payments and then clicking Reporting

- **Items by Manufacturer**
  Transactions by manufacturer (department)

**Note** Includes **Purchase For/Details** by item and direct links to receipts

- **Deposit Reports**
  Deposit Reports by date, product or account code