

# Portal Super User Guide



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## 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

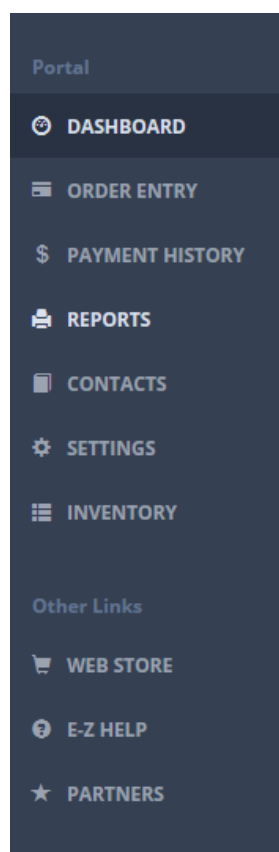
### Firefox

- 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 **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 receipt 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.

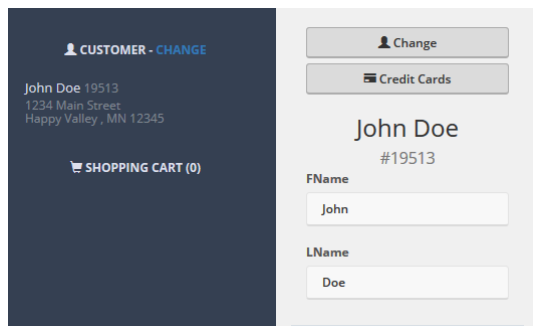
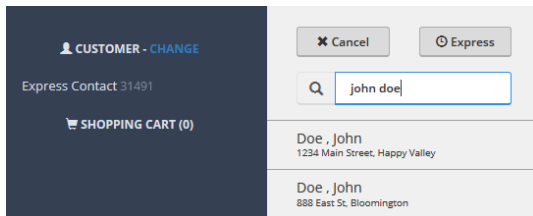
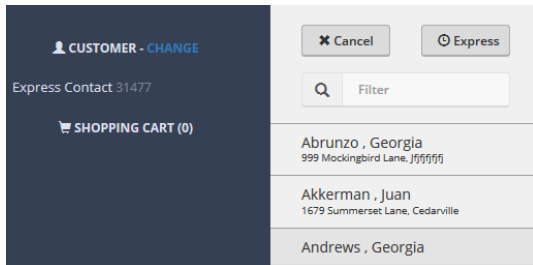
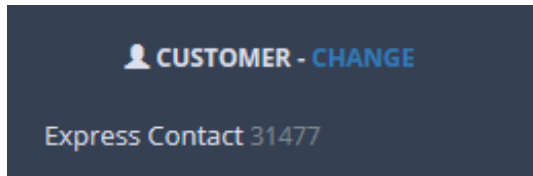
Under the heading **“Other Links”** are a few helpful links. You can view the **“Web Store.”** There is also a link to **“E-Z Help,”** which is where service requests can be entered and tracked. Knowledge Books and FAQs about the Web Store and Portal may also be accessed through E-Z Help.

## 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 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, 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

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, a customer profile is displayed for "John Doe" with address "1234 Main Street, Happy Valley, MN 12345". The shopping cart contains one item: "Art Supplies" with a quantity of 1 and a cost of \$0.00. To the right, the item details for "Art Supplies" are shown, including a cost of \$10.00 and a quantity of 1. There is a field for "Enter Students Last Name and ID number" with the value "Doe, 1234". At the bottom, there are "Cancel" and "Save" buttons.

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

The screenshot shows the checkout interface. It features a table with the following data:

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, and Order Total: \$129.36. There is a link for "Pay with eCheck". The payment information section includes fields for Credit Card Number, Cardholder Name (John Doe), and Expires (07/2017). There is also a field for Nickname (Optional). At the bottom, there is a checkbox for "Save this card" and buttons for "Cancel" and "Complete Order".

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	\$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.

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

## Pre-Authorizing a Card Account

**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. 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

**Last Name \***

Account found successfully.

**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.

**Account**

---

**Last Name \***

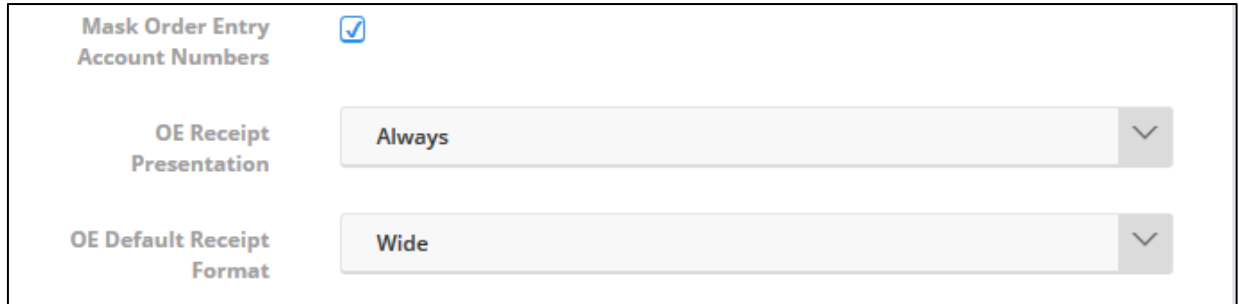
**ID Number \***

## 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.



The screenshot shows a settings panel with three options:

- Mask Order Entry Account Numbers**: A checkbox that is checked.
- OE Receipt Presentation**: A dropdown menu currently set to "Always".
- OE Default Receipt Format**: A dropdown menu currently set to "Wide".

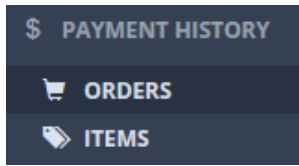
Masking card account numbers while processing in-person Order Entry payments is an important security feature that will put your customers more at ease - you may mask the account numbers by checking the box.

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.



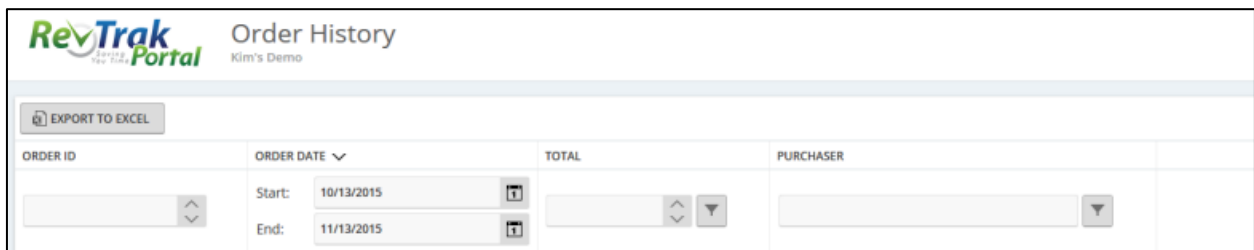
## Payment History



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

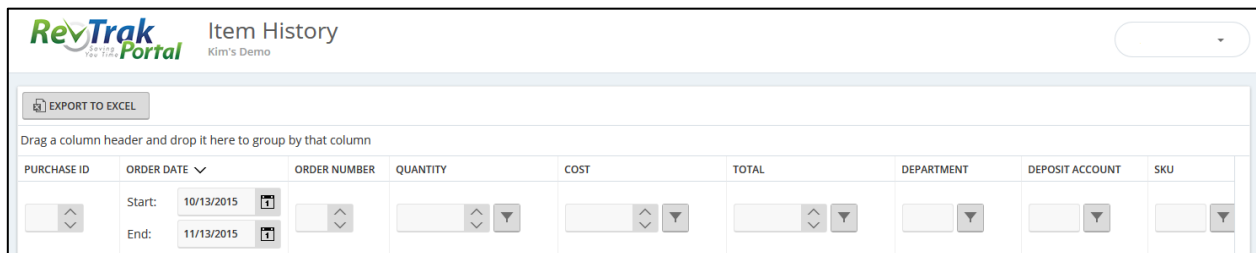
When reviewing both Item and Order History, you are able to filter orders by a number of qualifiers such as Order ID or Order Date. These filters are found at the top of the screen. You may either double click on an entry, Order ID or “More Details” to review a particular Order or Item Detail.

## 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



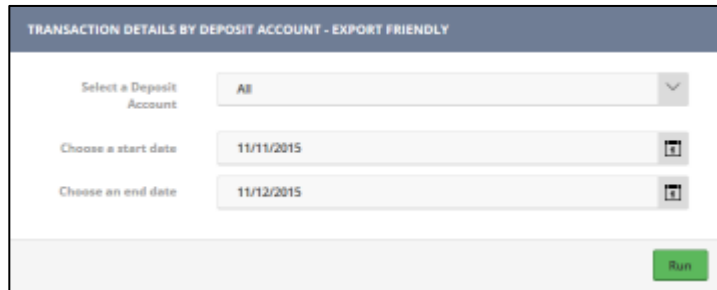
“Item History” is the second option and shows the individual items purchased by customers. Here you can review the purchasing trends for individual items, departments and deposit accounts.

## 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.

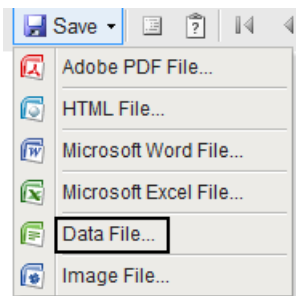
To generate reports, click “**Reports**” in your Navigation bar. It is the fourth option. The reports available to your access level will then generate. You may also narrow the results shown by typing a search into the filter bar such as “item” or “deposit.”

### Exporting Reports as a CSV File



The screenshot shows a web interface for generating a report. 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 field set to "11/11/2015", and "Choose an end date" with a date field 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.



## 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.

Edit

Contact		Address	
First Name	John	Address #1	10700 Lyndale Ave
Last Name	Smith	Address #2	
Company Name		City	Minneapolis
Email	John.Smith@RevTrak.com	State	MN
Phone	(555) 888-9999	Zip	55406
		Country	

Webstore

Web Customer

Confirmation Opt-Out

New Password \*\*\*\*\*

Re-type New Password

Orders

ORDER ID	ORDER DATE	AMOUNT	SHIPPING	HANDLING	TAX	SERVICE FEE	TOTAL
19056077	Thu Nov 12 2015 11:43:27 GMT-0600 (Central Standard Time)	\$50.00	\$0.00	\$0.00	\$0.00	\$1.75	\$51.75
19056076	Fri Oct 30 2015 15:13:44 GMT-0500 (Central Daylight Time)	\$65.00	\$0.00	\$0.00	\$0.00	\$0.00	\$65.00
19056075	Fri Oct 30 2015 14:28:14 GMT-0500 (Central Daylight Time)	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00
19056074	Mon Jun 22 2015 16:04:33 GMT-0500 (Central Daylight Time)	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00
19056073	Fri Jun 12 2015 12:51:06 GMT-0500 (Central Daylight Time)	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00
19056072	Fri Jun 12 2015 12:45:17 GMT-0500 (Central Daylight Time)	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00
19056071	Fri Mar 06 2015 13:47:32 GMT-0600 (Central Standard Time)	\$45.00	\$0.00	\$0.00	\$0.00	\$1.00	\$46.00

## 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 as the transaction. Pending transactions may remain on card holder accounts for approximately 3 to 5 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 3 to 5 business days.

### Locate the Transaction

Opening “Order History” (the first option under “Payment History” on your navigation bar), you will be able to look up the transaction or order using either the customer’s name or the order ID. Click “**View Details**” to view the transaction and issue a void or refund.

19056077	11/12/2015	\$51.75	John Smith	<a href="#">VIEW DETAILS</a>
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### Partially Refund a Transaction

Cost	<input type="text" value="\$25.00"/>	\$25.00
Service Fee	<input type="text" value="\$1.75"/>	\$0.00
<input type="button" value="Refund All"/> <input type="button" value="Refund \$26.75"/>		

In 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.

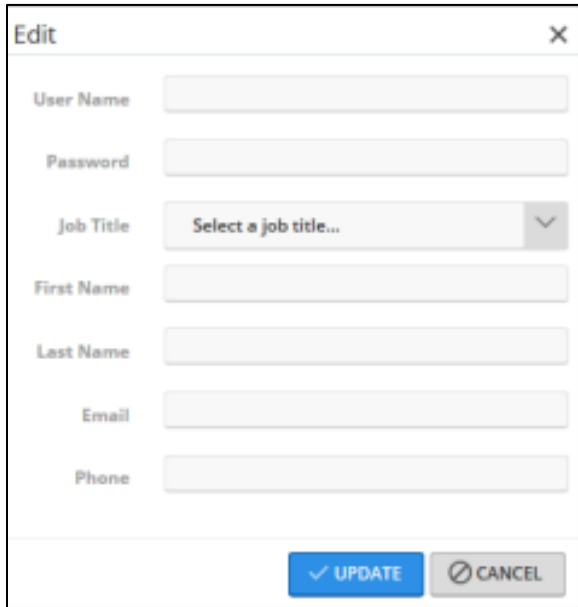
### Refund or Void the Transaction

Select “**Void/Refund Order.**” The software will automatically complete the appropriate action. The screen will refresh and you will be able to view the void or refund.

*Please note that 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, which is the sixth selection on your navigation bar.

### Add a New RevTrak Portal User

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

Usernames and passwords will not automatically be sent to the new user. Please provide the new user with a **RevTrak®** Portal link as well their login credentials.

### Edit a Current RevTrak® Portal User

- Click the "**Settings**" option and select "**Users.**"
- 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	√			
Globals	Edit	√			