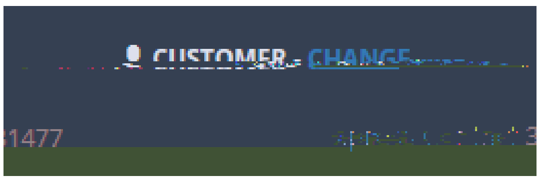
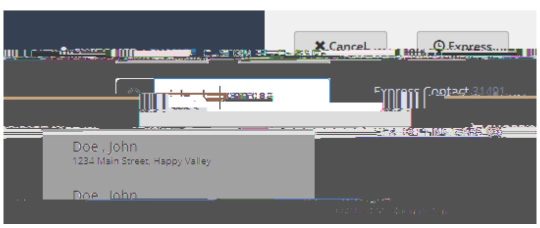
Processing an Order Entry Transaction

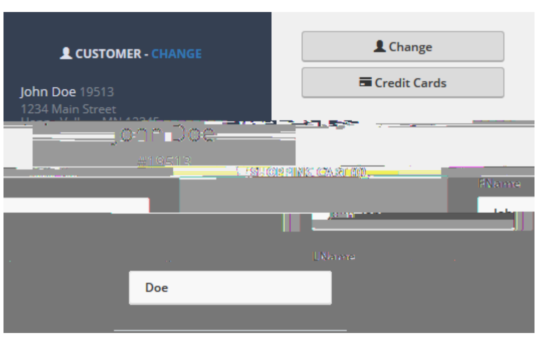
Order Entry allows you to collect in-person, phone-in, and mail-in payments. You must be logged in to the RevTrak® Portal to use Order Entry. Please note that Internet Explorer is the required br to use a card reader with Order Entry.

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

Selecting a Customer







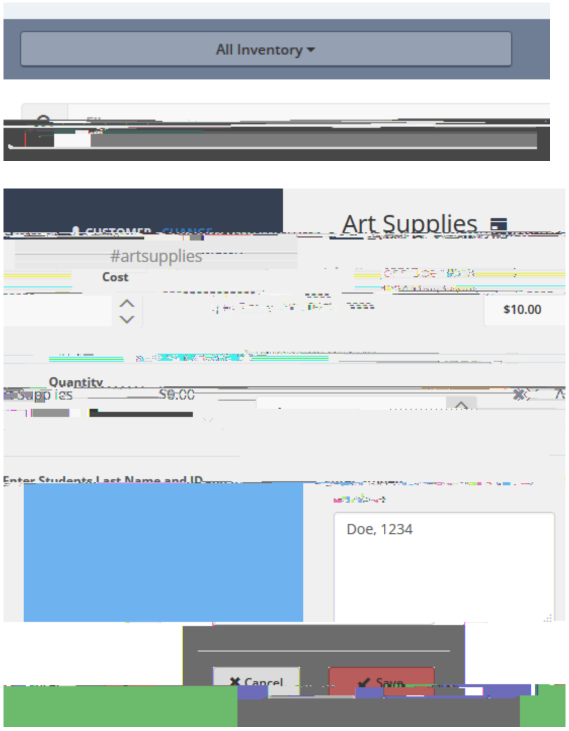
To take an in-person payment, you first need to indicate from whom you are receiving the paymen The default setting will indicate an "Express Contact." If you continue using an "Express Contact" for your Order Entry transaction, the customer will not be emailed their receipt at the end of the transaction.

Order Entry integrates with existing accounts with 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 t 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

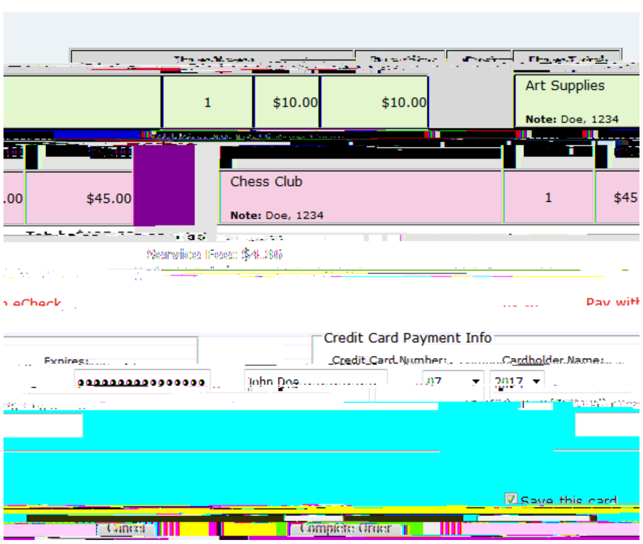


You can easily locate items by choosing an ^Inventory_group from the dropdown. You may scroll through all items or search for the item by the item name in the ^Filter_field. Click on the item to add it to the ^Shopping Cart_

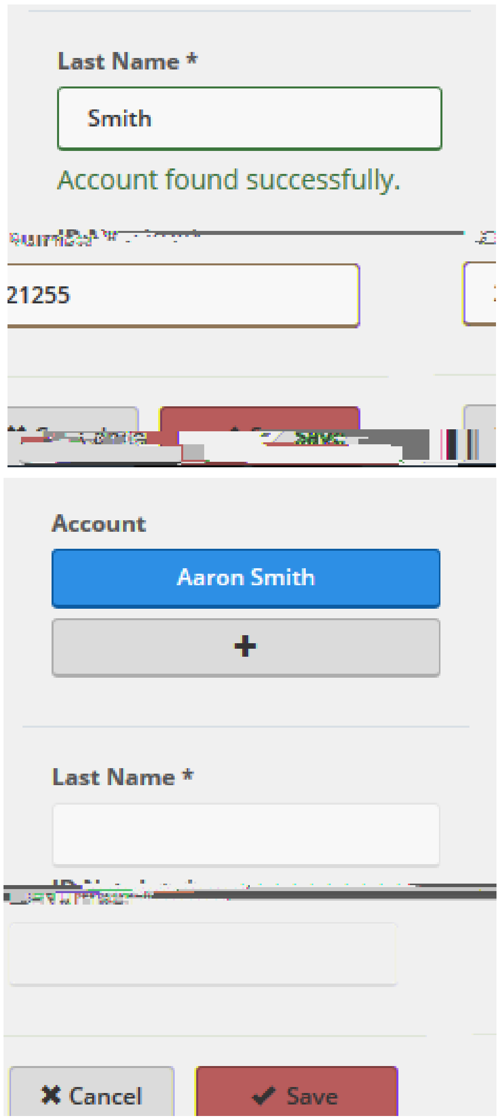
Enter any required information for the item and click ^Save_This will add the item to the ^hopping Cart. _The item will not allow you to save if there is required information that has bee left incomplete.

The ^Shopping Cart_will display all items selecte for purchase. You may edit an item by clicking o the item name. To delete an item from the Shopping Cart, sele.25 Tm 0 g [.G.25 Tf 1 0 (

Checking Out



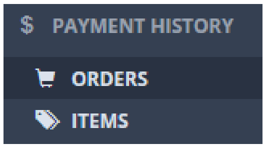
Processing an Order Entry Transaction for an Item with Account Linking



After selecting a customer (page 3), add an item to the cart (page 4). An item that uses Account Linking will Z À ( ] o • š } v š Œ š Z 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.

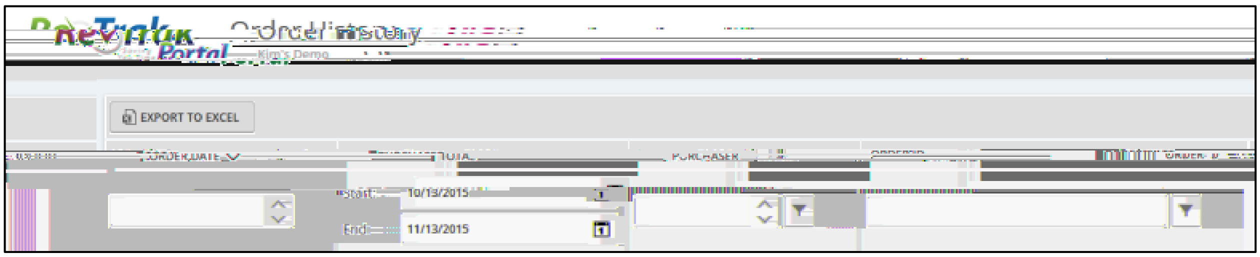
Payment History



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

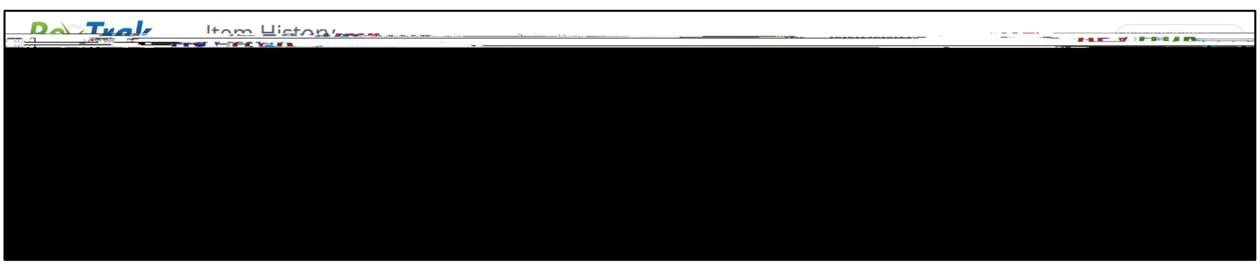
When reviewing both Item History and Order History, you are able to filter orders by a number of qualifiers such as Order ID or Order Date. These filters are found at the top of the screen. You may either double click on an entry, Order ID or "More Details" to review a particular Order or Item Detail.

Order History



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

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

Exporting Reports as a CSV File