

REVTRAK WEB STORE IMPLEMENTATION GUIDE



Welcome to the Vanco Education family. You've taken the first step toward streamlining your school's payment processing into a simple, efficient Web store Solution. We welcome you to our community with members spanning over 1,300 districts across the United States. Although you are new, we hope that you'll join the ranks of schools and districts that have been with us for decades.

We've put together this resource to help you set up your RevTrak Web Store. You'll find valuable implementation tips and learn what to expect during the implementation process within this guide. Let's get started.

1 Kickoff Meeting

The kickoff call is where the rubber meets the road in the implementation process. Your implementation specialist will review your welcome document to ensure all your concerns are addressed early on. This implementation call will take anywhere between 30-60 minutes via a Zoom meeting to kickoff the entire implementation process.



Here's a breakdown of the details we'll discuss during the kickoff call:

- 1. Planning:** What are your goals during the implementation process? Whether you need a fast launch or are concerned about managing the technical side of things, your implementation specialist will help you define your goals and create a strategy that is aligned with your priorities and will ensure a successful implementation.
- 2. Decision Making:** During the kickoff call, we'll handle some of the serious decision making the process requires. In addition to outlining goals, during this call, you'll identify the Web Store tiles and fees you need to be built. Topics touched on will include fees, integrations, timelines and more. We use this information to build a custom Web Store that is outfitted with all the features your district will need to successfully collect and manage payments and fee collection.

- 3. Communication Schedule:** We'll set up a schedule for regular communication to ensure we stay aligned throughout the implementation process.
- 4. Training:** Your implementation specialist will help to get you and your team trained on the management and function of your new Web Store. Your specialist will provide some basic training alongside valuable training resources that you can view on your own time. Chief among these resources will be our native Learning Center, which features a vast collection of helpful How-To articles and training videos. Your implementation specialist will show you how to access these videos at any time via the Portal.

2 Pre-Launch Phase and Review

During this phase, our team is hard at work **building your new Web Store** based on the details provided during the kickoff meeting. We'll be building all of the items on your Web Store, including any required fees you'd like to be able to assign. This is also the time when we work to integrate your Web Store with any other technologies you're currently using, like your student information system, food service software and others.



Once we have your Web Store built, we'll run through a pre-launch checklist to confirm that everything is working well and was built to your specifications. You will have the opportunity to access the Web Store and provide feedback regarding any changes that need to be made. At this time, you'll receive **additional training** on how to use the admin portal which will allow you to control your Web Store.

Once you've given us feedback on the Web Store, our team will get started on making necessary updates and additions before receiving final approval for launch.

3 Going Live and Implementation

After receiving final approval, the Web Store is ready to go live. We'll get the ball rolling on marketing materials. It is important to effectively communicate to students and families about your district's new payment and fee processing software to ensure a successful launch and drive use. We'll draw up customized marketing materials that include parent flyers with information about how to use the new Web Store. From there, your store will be launched on a predetermined date.



4 Support

Congrats on the successful launch of your new RevTrak Web Store! Once your Web Store has gone live, we'll provide you with the client services contact information, so that you can always get in touch with one of our team members when you need support. Our client services team will be able to make adjustments and provide essential maintenance to ensure that your Web Store is successful long after its launch.



Keys to Successful Implementation

Although every launch is unique, there are tried and true methods that help to ensure a successful implementation. We've put together some of the key predictors of success for our Web Store users to help you get the most out of the RevTrak launch process.



- 1. We're here to help. Get in touch whenever you need us.** Consistent effective communication with your implementation specialist will go a long way to achieving implementation success early on. If you have questions or need help, call your implementation specialist who will help you find the solutions you need and to resolve any issues you may be having. Your implementation specialist is as dedicated to your success as you are!
- 2. Make it easy to find payment links on your website.** When parents visit your website, don't make them hunt for the right payment link. We can send your IT team a payment button to add to your district website, which will bring families directly to the payment portal. Want to go the extra mile? We offer informative parent flyers for schools to distribute to families. These flyers help ease the transition to RevTrak.
- 3. Nominate a resident implementation representative.** Having a dedicated implementation representative on the school's side of things streamlines the process. Our team and your representative can communicate more effectively through a simplified chain-of-command. Avoid email chains, bloated inboxes, and missed messages, and support efficient communication.
- 4. Know your go-live date.** Our commitment to helping clients get the most out of their RevTrak implementation means minimizing the time it takes to launch your store. We ask that clients give us a goal date for when they want to begin accepting parent payments to make their launch as efficient, as possible. Generally, implementation can take anywhere between 14 to 60 days, depending on client needs outlined during the kickoff call. Setting a go-live date upfront ensures that the project is planned and optimized to hit that goal.
- 5. Utilize the training resources.** Although you'll find plenty of helpful instruction and launch tips through the calls with your implementation specialist, there's no matching the value of our training videos. Set aside an hour (that's it!) to watch one of our live Zoom or pre-recorded videos to get better acquainted with the new software you'll be managing.