Intro

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Hi, I'm Jamie, and this is my fourth year as a Book Fair host. Now that I know my way around a bit, I'm going to give you a quick overview of the payment portal. This video explainer will show you how to process credit card and eWallet payments from any device connected to the internet. As you're watching, if you already have a handle on the info, feel free to jump ahead to another chapter.

Let's get started.

Chapter 1: Preparing to use the Payment Portal

The payment portal allows you to process credit card and eWallet payments for the Fair. Here are some tips to get you set up. You can access the payment portal from Fair details and settings in the Host Hub or from the email that was sent to you. You can use any device as long as you're online. And here's a pro tip.

Use a tablet so adult shoppers can easily enter their credit card details. Before you make any sales, review your payment portal home screen to ensure your Fair information is correct. Then you're set to access the portal up to five days before your school's Fair start date. As you're checking shoppers out, you'll need to calculate the purchase total, including sales tax for each transaction.

Use this customizable tax rate sheet to determine the total price, including tax or another pro tip. Use your phone's calculator. If your school's Fair received a scholastic register to use in addition to the payment portal, make sure the register is connected to the internet. This will guarantee that when you process eWallet transactions in tandem with the payment portal, they will be accurate.

Be sure to view chapter two of the payment system video explainer for details on connecting the register to wifi. Last tip. If the payment portal has been inactive for 30 minutes, the session will time out and close automatically. So be sure to refer back to your email link or access it again from fair details and settings in the Host Hub.

Next up, we'll review how to process sales with the payment portal.

Chapter 2: Processing Sales

Once you've checked that your fare details are accurate on your Payment Portal home screen, you're ready to start taking sales. Select whether to process a credit card payment, eWallet payment, or refund an eWallet. If you need to process a credit card refund, call 888 412 7000. Once you've completed a sale, you'll notice the totals on your home screen will be updated.

This will happen in real time throughout the fair, so you'll always know your credit card and eWallet sales amounts. Let's look at processing a credit card sale. You'll need to enter the payment amount and don't forget to calculate tax on the purchase. This is where your calculator and customizable tax rate sheet come in handy.

Continue to complete the required fields. Customer's first and last name, credit card number, expiration date, and security code. If you're using a tablet, ask the adult shopper to fill in their personal information. Then, review the payment for accuracy and submit. A transaction success message will display with the option to email the customer a receipt.

The payment portal will then return to the home screen to begin the next transaction. Now let's review processing a sale using an eWallet balance. When you select eWallet payment from the home screen, you'll have the option to

search for the eWallet by name, grade, or you can use the filter to sort by student or teacher name.

When you find the correct eWallet to use, select it and enter the total payment amount. Once again, remember to include the sales tax. Select submit payment and that's it! You'll see the transaction successful message as the home screen resets to begin your next sale. The eWallet account owner receives their transaction email automatically.

It's super easy. And it's just as easy to process an eWallet refund. Simply select eWallet refund from the home screen and locate the eWallet you want to refund. Find the sale that was completed, then choose amount. From there, you can offer a full or partial refund. For now, let's choose full refund. And then you would select the submit refund button.

The refund successful message displays as your home screen resets. And now you're a pro at processing payments in the portal.

Chapter 3: After the Fair

Once the fair has ended, give yourself a pat on the back because you did it! The payment portal will close at 12:00 midnight Eastern time on the last day of your Fair. Within approximately 24 hours, your totals will automatically display on the financial form in the Host Hub. If you used a register in addition to the payment portal, your registered totals will automatically display on the financial form as well.

You can then review and submit your financials. If you need assistance completing your financials, you can contact Financial Form Assistance at 888 412 9124. Now you're a payment portal expert. You're ready to check out shoppers with ease so they can dive into their new purchases and get to the BookJoy faster.