

Employer's guide to the customer portal.

How to order Reka Money credit for your employees.

reka

Contents

1	Introduction	**3**
2	Login	**3**
3	Overview	**4**
4	Profile settings	**5**
5	Reka Money types	**6**
6	Employees	**6**
7	Quotas	**8**
8	Sending to employees	**9**
9	Event payment	**9**
10	Invoices	**10**
11	Support	**10**

1 Introduction

In your personal profile on the Reka customer portal, you can easily manage the distribution of Reka Money credit: you record your employees' personal data and update entries and exits.

After completing all the necessary steps, we send your employees a letter with QR invoices. With these, they can obtain their Reka Money credit. Alternatively, we can carry out the Reka-Card loading for you as requested.

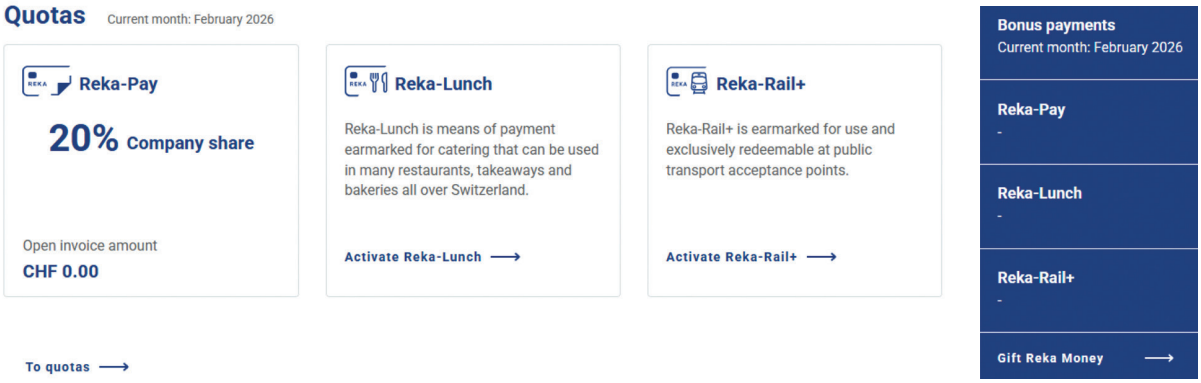
It is possible that certain functions described in this guide are not available in your customer portal. This depends on the offer provided by your company.

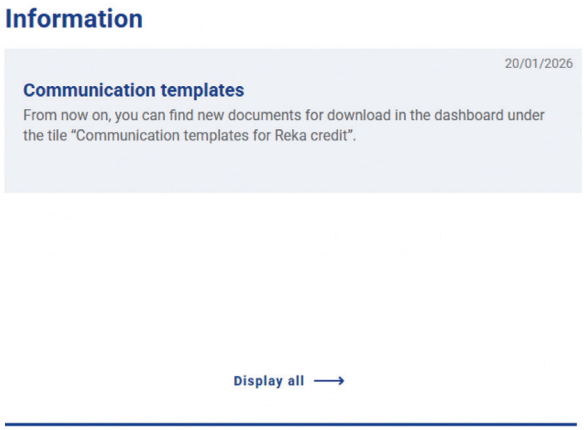
2 Login

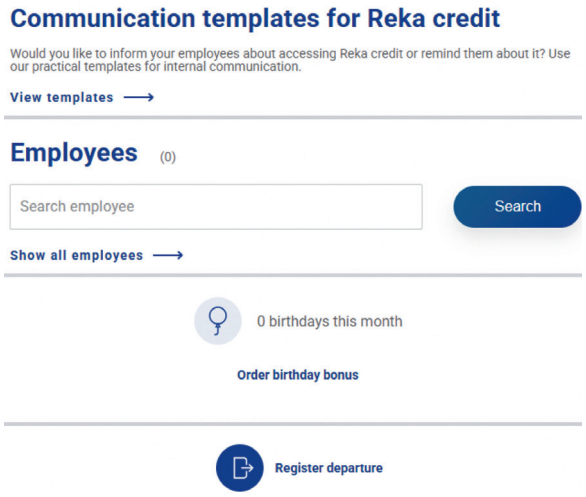
Access the customer portal as follows: Log in on reka.ch at the top right under «Login» with your e-mail address and password. Your login details were sent to you by e-mail after the contract was finalized.

3 Overview

The home page provides an overview of your offer, news, outstanding invoices or direct access to the main functions.

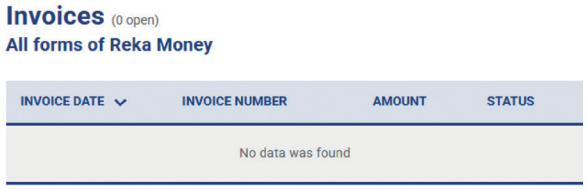








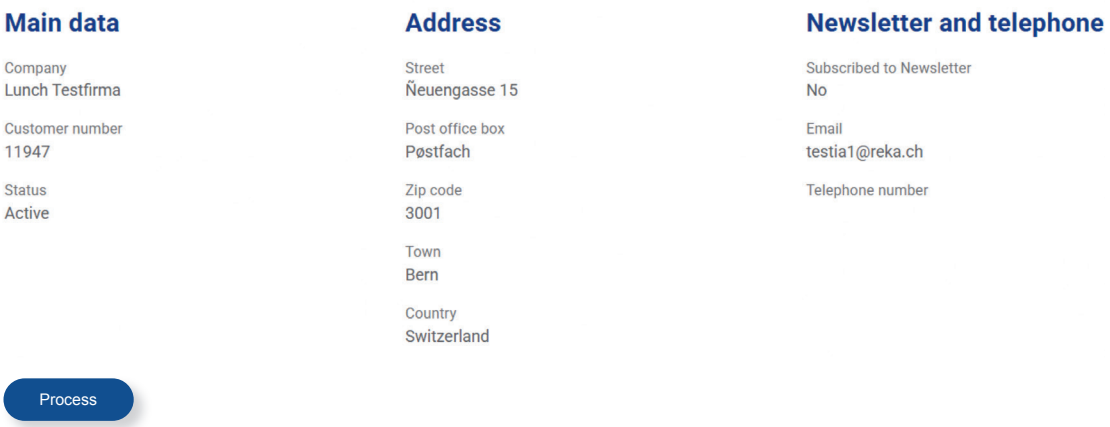


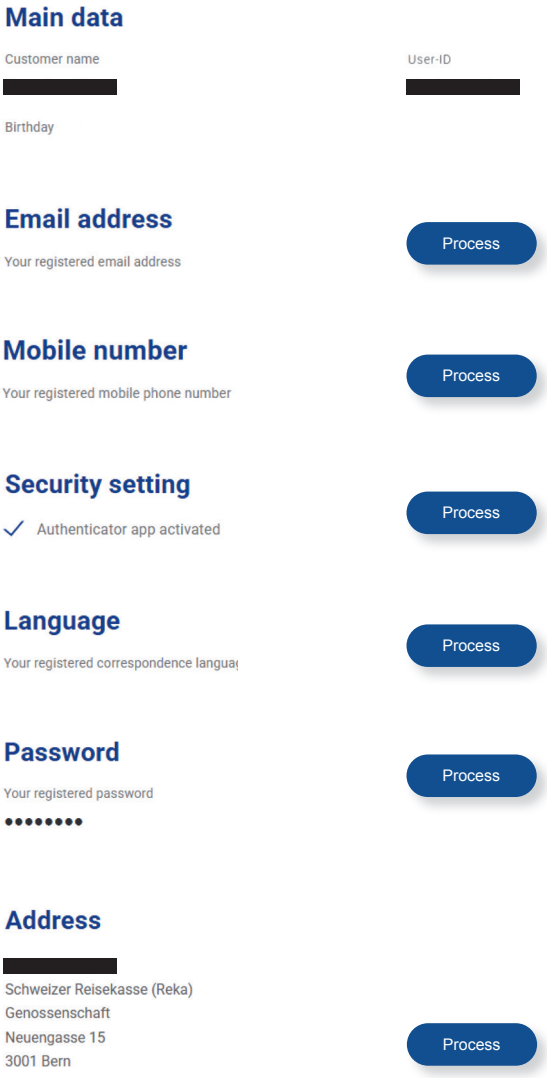




4 Profile settings

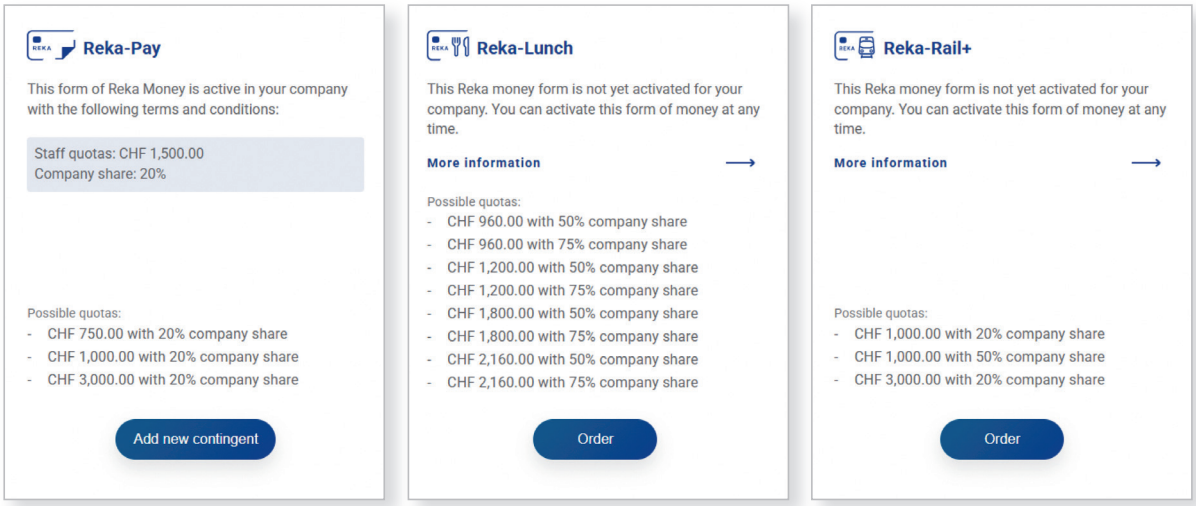
You have a «Company profile» and a «My profile» where all your master data is recorded. You can change this by clicking on the «Edit» button. Under «Admin management», you can add additional users and assign permissions.





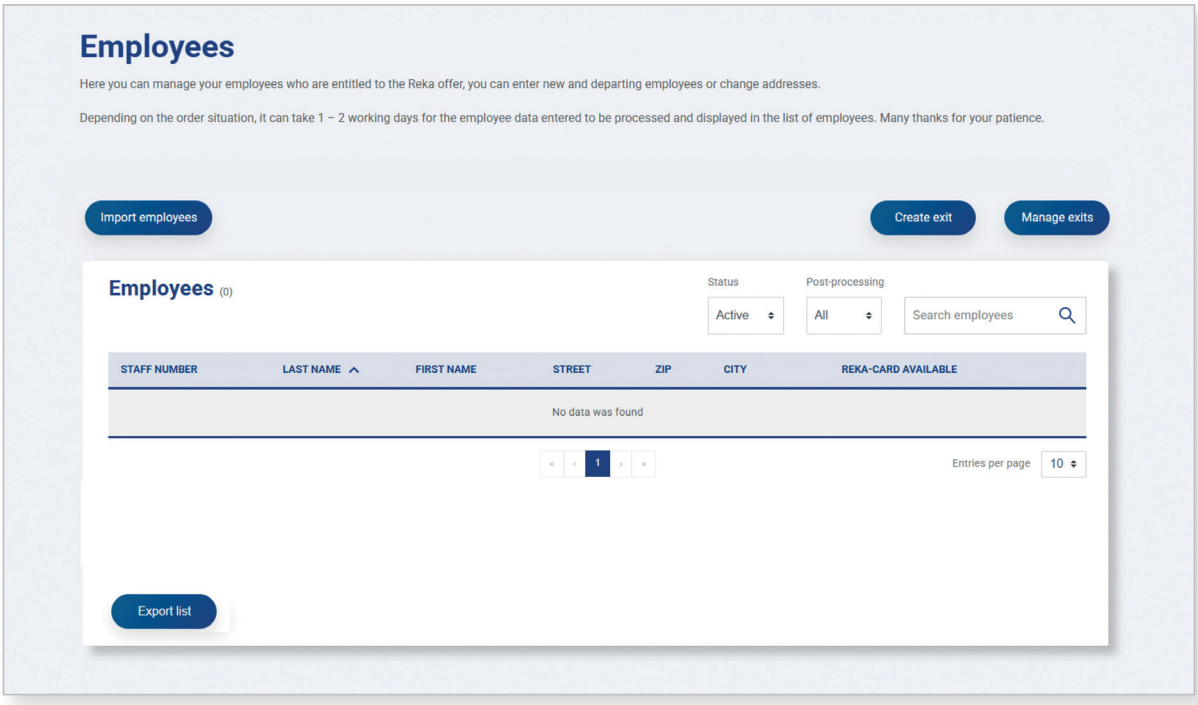
5 Reka Money types

Under this menu item, your active offers are displayed. Additional money types can be activated or an existing offer can be extended.



6 Employees

In the «Employees» menu, your employees' data is imported. Either for individual new entries via the «Add employees» button or for multiple employees using an Excel template via the «Import employees» button. Please ensure you use the template provided by Reka. This can be downloaded from the customer portal at any time. The completed file can then be uploaded using the import function.



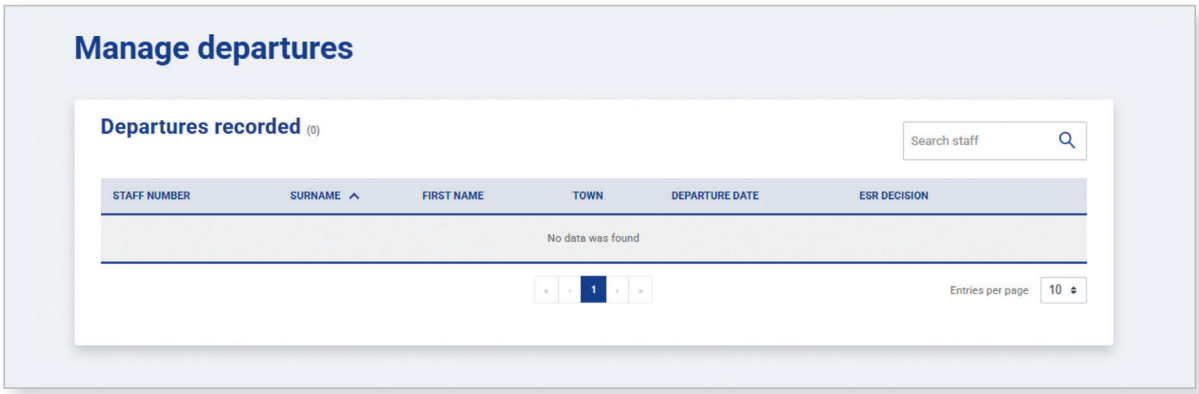
Screenshot nicht identisch mit D

After uploading, records with missing or invalid entries are displayed in the «Invalid» tab. Changes to the entries can be made directly in the customer portal by clicking the pencil icon (red framed) behind the respective record. You will then see which entries have errors and which mandatory fields need to be completed. Once the erroneous records have been corrected, complete the process with «Confirm import». Complete and error-free records can also be reviewed and edited in the «Valid employee data» tab before confirming the import.



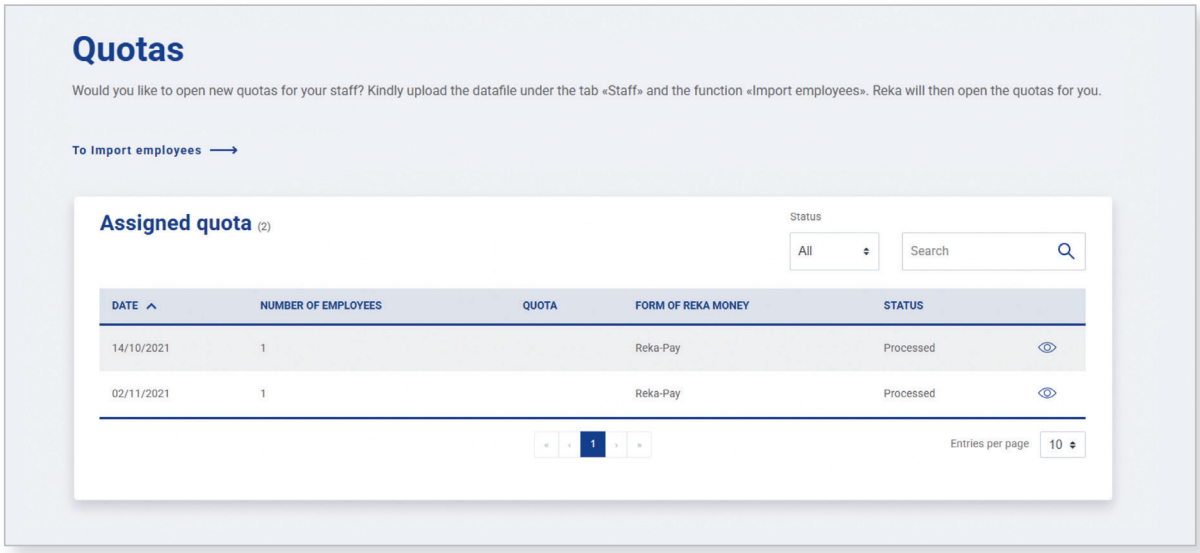
The data of your employees can also be changed under this menu item. Using the search function, you can find the respective employee. You can then edit the master data.

If an employee leaves your company, record the exit in this register.

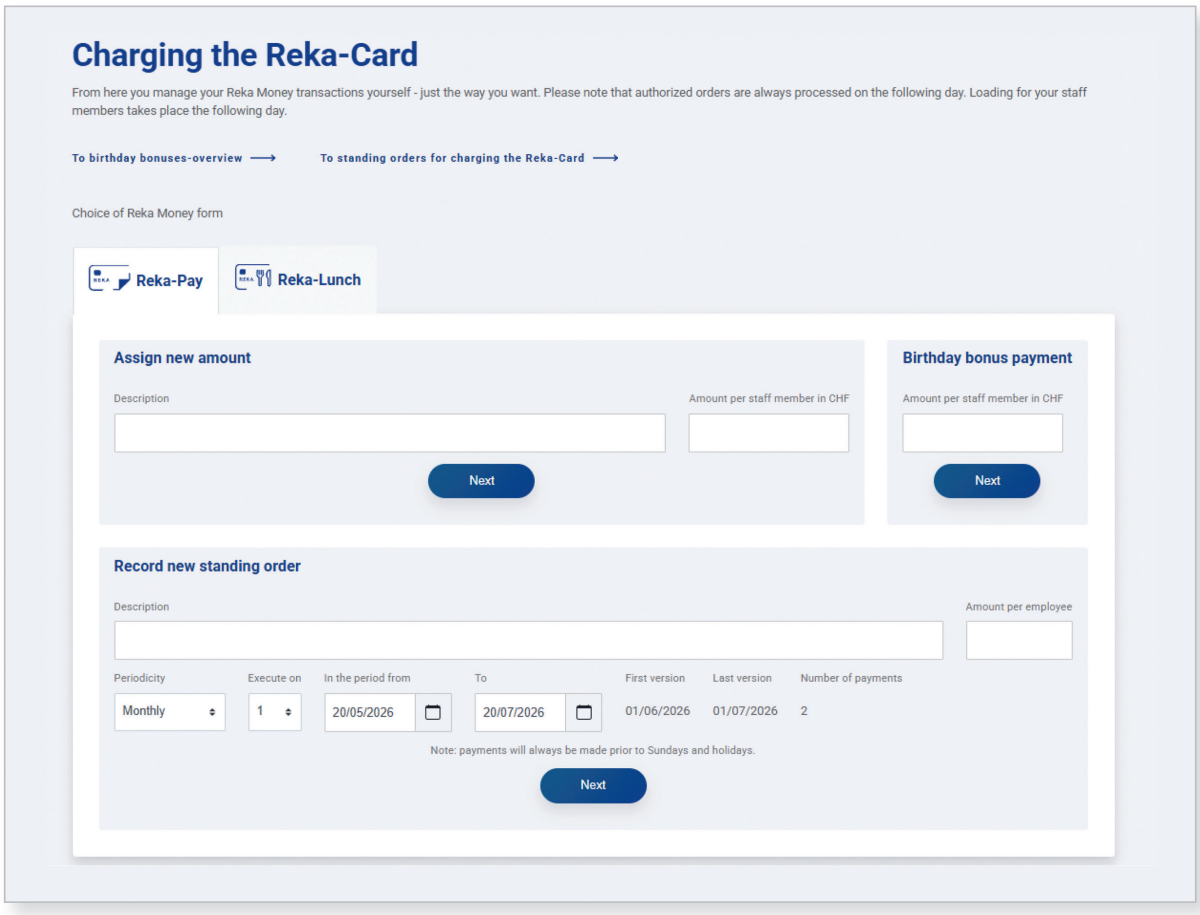


7 Quotas

In the «Quotas» menu, you assign the desired quotas to your employees or renew them if needed.



In the «Reka-Card loading» menu, you assign the desired amount to your employees and carry out the loading. The amount will be credited to your employees the following day.



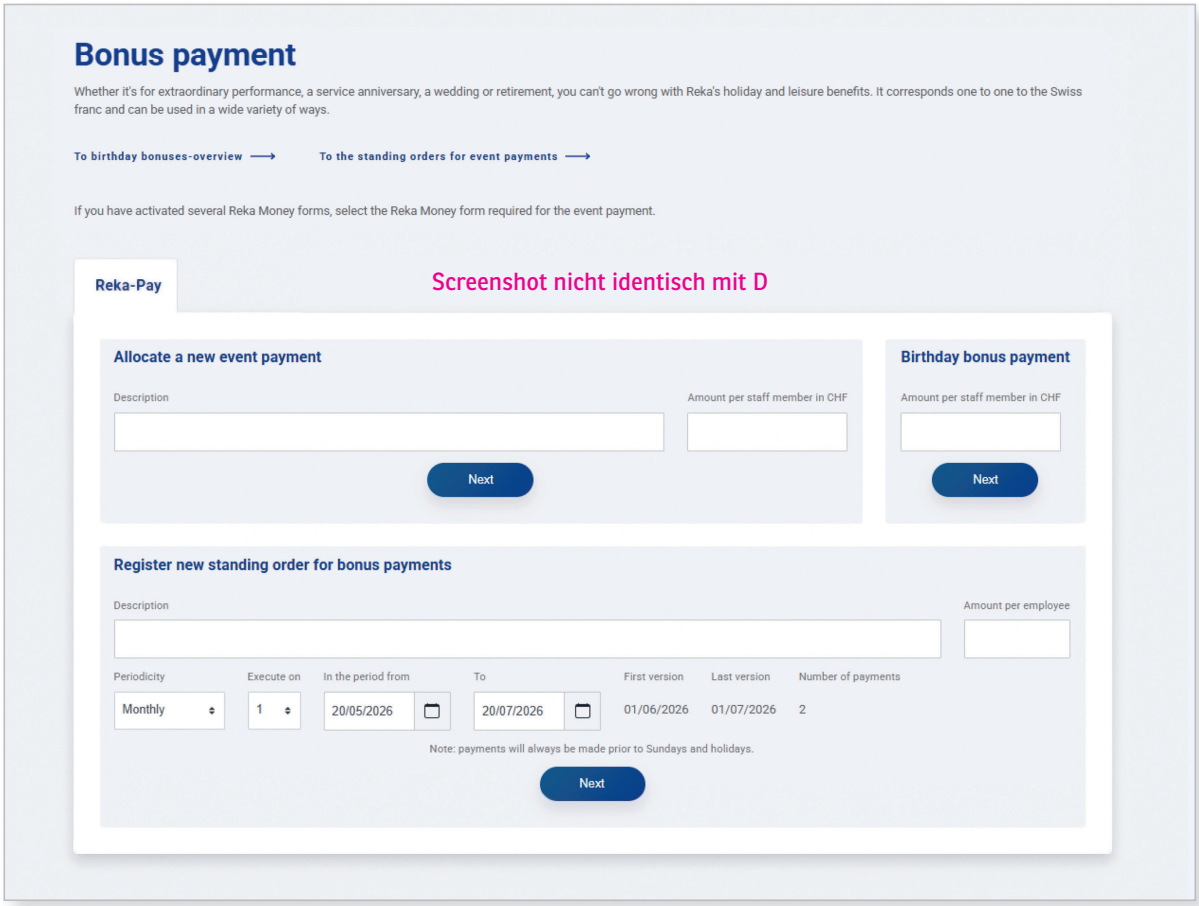
8 Sending to employees

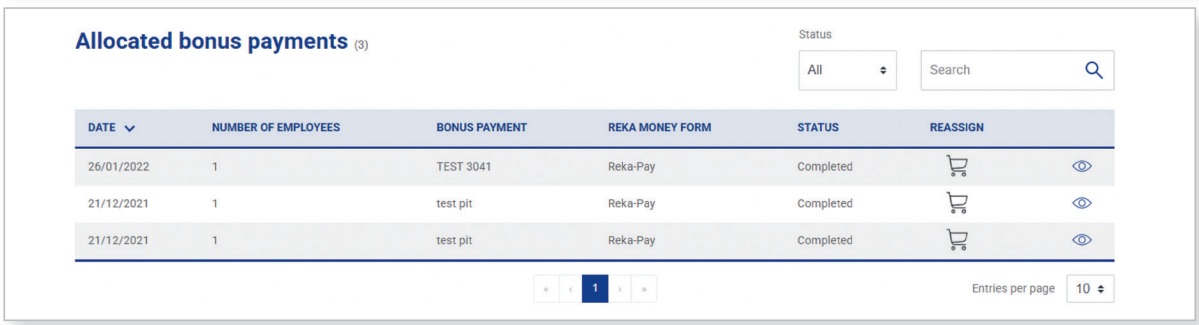
After triggering an order, the deliveries to your employees are processed by Reka and the postal dispatch is initiated. This happens twice a week. Deliveries to employees are sent on Tuesday and Thursday.

Your employees receive:
– Reka cover letter with login data for the customer portal, including an excerpt from the GTC
– QR invoices to obtain Reka Money credit
– Flyer

9 Event payment

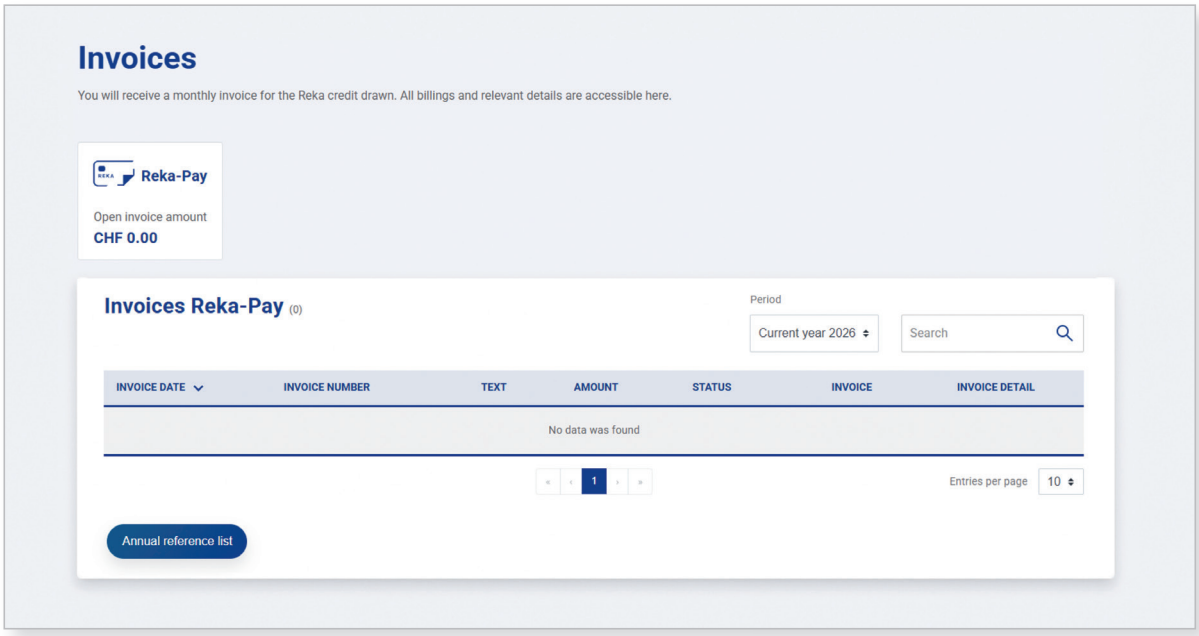
For extraordinary performances, service anniversaries, weddings or retirement, the «Event payment» function allows for one-time Reka-Card loadings. For recurring orders, set up a standing order.





10 Invoices

The monthly invoice will be posted on your customer portal. You will be informed by e-mail. Postal dispatch is no longer carried out.



11 Support

The support section contains answers to the main questions and a tutorial that explains the main functions of the customer portal.

If you have any questions, we are happy to help: +41 31 329 66 69 or business-support@reka.ch