

QUICK START GUIDE: ONLINE ORDERING

With CaterTrax online ordering, you can place a catering or take-out order at any time, on any device. Whether you are planning for a special event, team meeting, or your next meal, we've got you covered.



Follow the steps below for a quick and easy way to manage your catering and take-out orders. With an online account, you gain access to:

- Place orders
- Request changes
- Track orders
- Repeat orders

GET STARTED

To start, visit your CaterTrax website.

1. Click **Account Sign In/Register** in the top right corner of the homepage. (Figure 1)
2. Click **Need an Account?** in the submenu.
3. Complete all required fields in the **New Customers** tab and click **Continue**.

Step 1

CATERTRAX®
Software for Managed Hospitality

Catering ▼ Take-Out ▼ Floor Stock ▼ Contact Us

Account SIGN IN / REGISTER Cart \$0.00

Sign In or Register

Sign in to your account to start a new order or manage your existing orders, or get started by registering for an account

Last Name

Email

Password

[Need an Account?](#) [Need your password?](#)

SEASONAL SPECIALS: Available for a Limited Time >

Step 2

Figure 1 - Create an Account

QUICK START GUIDE: ONLINE ORDERING

CREATE AN ONLINE WALLET

Make sure you are logged into your account.

1. Click **Account** in the top right corner of the homepage.
2. Click **Manage Online Wallet** in the submenu. (Figure 2)
3. Select desired payment method (cost center, credit card, etc.)
4. Complete the form for the payment method.
5. Click **Add Wallet Entry**. (Figure 3)

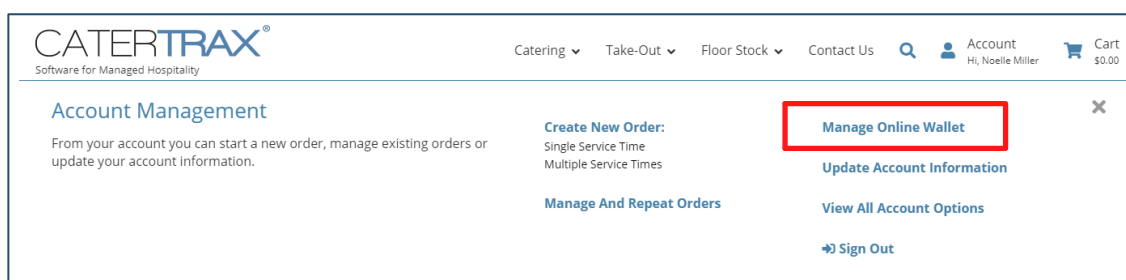


Figure 2 - Manage Online Wallet

A screenshot of the 'Add Online Wallet Entry' form. The form is titled 'Current Online Wallet Entries:' and 'Add Online Wallet Entry:'. It contains several input fields: 'Payment Method' (set to 'Credit Card'), '*Wallet Description:', '*Card Type' (set to 'Visa'), '*First Name:', '*Last Name:', '*Email:', '*Card Number:', '*Expiration Date:' (with month and year dropdowns), '*Card Address:', '*Card City:', '*Card Country:' (set to 'Select'), '*Card State:' (set to 'Select'), and '*Card Postal/Zip Code:'. At the bottom of the form, the 'Add Wallet Entry' button is highlighted with a red box. Below the form, there is an 'SSL Secure 128-bit encryption' badge.

Figure 3 - Add Wallet Entry

QUICK START GUIDE: ONLINE ORDERING

CREATE A NEW ORDER

Make sure you are logged into your account.

1. Choose a menu starting from the top navigation. (Figure 4)
2. Browse the menu and select the item(s) you want to order.
3. For each item, fill in item details and click **Add to Cart**.
4. Once all items have been added to your cart, click on **Check Out** in the cart.
5. Select your order date and pick-up or delivery method, complete the details, and click **Continue**.
6. Review Order Summary and, if correct, click **Continue**.
7. Select your payment method, complete the details, and click **Place Your Order**. (Figure 5)

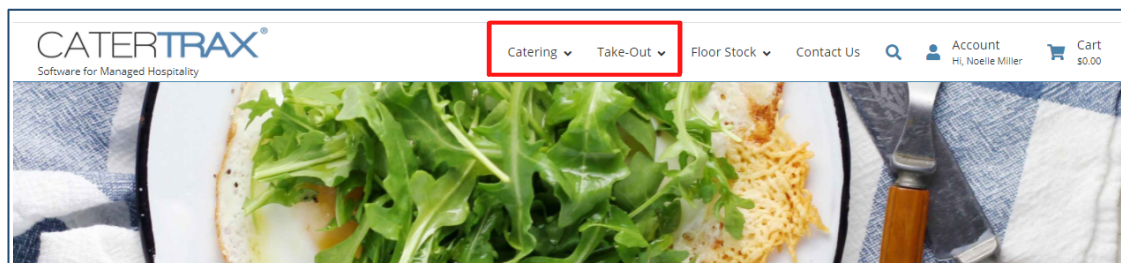


Figure 4 - Create New Order

The image shows a 'Payment Method' form. At the top, there's a blue header with a minus icon and the text 'Payment Method'. Below this, a note states: '*Please Note: The final invoice may be re-calculated to satisfy special requests or additions to standard offer. You MUST click the Process This Order button below to complete this order.' The form is titled 'Enter Payment Information' and asks to 'Select a payment method'. It includes a red note: 'Any saved online wallet entries are now listed under the appropriate payment method'. The form has several fields: '*Payment Method:' with a dropdown menu showing 'Cost Center'; '*Cost Center Number:' with a text box containing '00241'; 'Save Wallet Entry for Future Use:' with an unchecked checkbox; '*Approval Email Address:' with a dropdown menu showing 'Accounting Dept. | CATERUSER@catertrax.com' and a link to 'Click here to enter an alternate email'; and 'CC Additional People (Optional):' with a text box for email addresses. There's also an 'SSL Secure' logo. At the bottom, there are three buttons: 'Return to Summary', 'Cancel', and 'Place Your Order'. The 'Place Your Order' button is highlighted with a red rectangular box.

Figure 5 - Place Your Order

QUICK START GUIDE: ONLINE ORDERING

MANAGE ORDERS

Make sure you are logged into your account.

1. Click **Account** in the top right corner of the homepage. (Figure 6)
2. Click **Manage and Repeat Orders** in the submenu. (Figure 6)
3. You'll see an overview of your order history (Figure 7). From this view, you can:
 - Search for Orders by Date
 - View Previous Orders
 - Repeat Orders
 - Request Changes

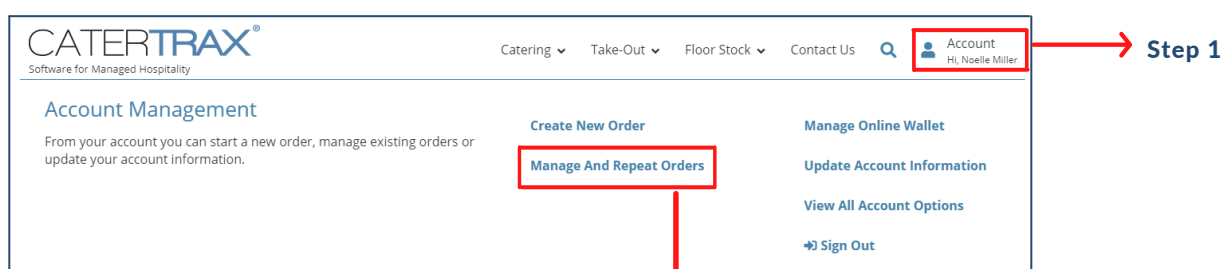


Figure 6 - Manage Orders (Account Drop-Down)

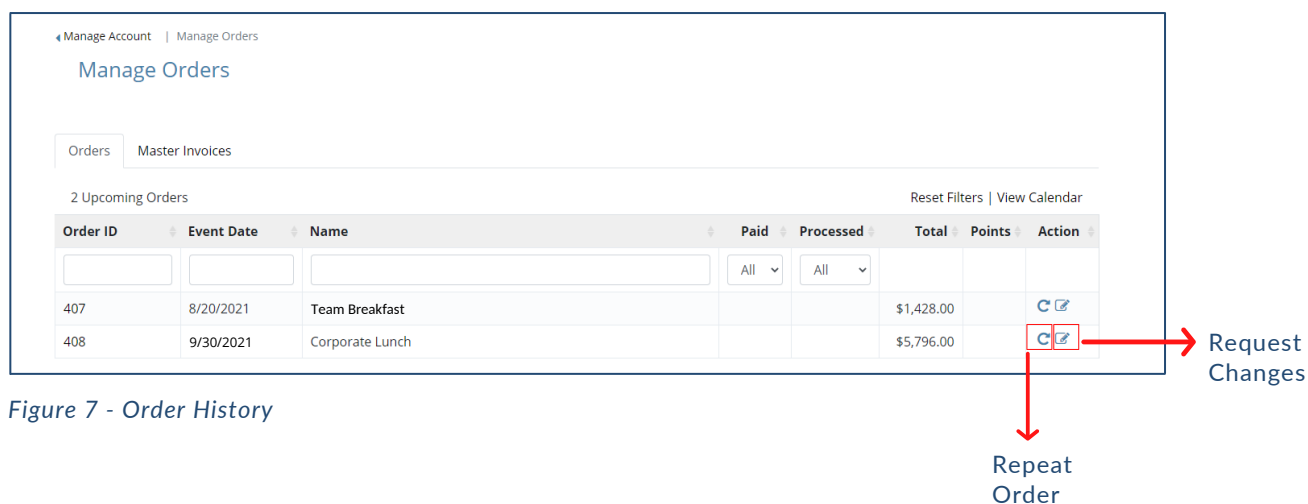


Figure 7 - Order History

QUICK START GUIDE: ONLINE ORDERING

REQUEST CHANGES

Some CaterTrax sites do not permit customers to request changes online or if an order is placed within a certain time period of the pickup or delivery date. If this feature is available to you, please follow the steps below.

Make sure you are logged into your account.

1. Click **Account** in the top right corner of the homepage.
2. Click **Manage and Repeat Orders** in the submenu.
3. Locate your order and click the **Request Changes** icon under **Action**.
4. Complete the **Change/Update Request Form** and click **Send Change/Update Request**. (Figure 8)

You will see an updated view of your order. The food service team will review your requests to determine if they can be accommodated. Note that changes and cancellations are **not** confirmed until the food service team responds to you.

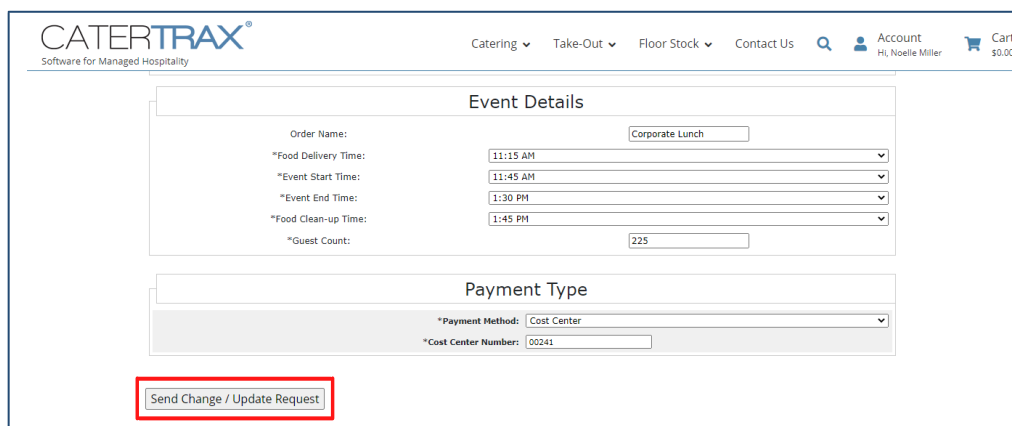
The screenshot shows the CaterTrax web interface. At the top, there's a navigation bar with links for Catering, Take-Out, Floor Stock, Contact Us, a search icon, and user account information (Hi, Noelle Miller) and a shopping cart (\$0.00). The main content area is titled "Event Details" and contains several fields: "Order Name" (Corporate Lunch), "*Food Delivery Time" (11:15 AM), "*Event Start Time" (11:45 AM), "*Event End Time" (1:30 PM), "*Food Clean-up Time" (1:45 PM), and "*Guest Count" (225). Below this is a "Payment Type" section with "*Payment Method" (Cost Center) and "*Cost Center Number" (00241). At the bottom of the form, there is a button labeled "Send Change / Update Request" which is highlighted with a red rectangular box.

Figure 8 - Change/Update Request Form

QUICK START GUIDE: ONLINE ORDERING

REPEAT ORDERS

Make sure you are logged into your account.

1. Click **Account** in the top right corner of the homepage.
2. Click **Manage and Repeat Orders** in the submenu.
3. Locate your order and click the **Repeat Order** icon under **Action**.
4. Review your cart and select your new date, time, and delivery method.
5. Add your order name, review your order summary, and proceed to payment.
6. Enter your payment method details and click **Place Your Order**.

Like placing an individual order, you will be directed to a page with order details. From that page, you have the option to print order details, send details via email, or add the order to your Outlook calendar. (Figure 9)

Thank you! The catering team is reviewing your order and will send you a confirmation message.

You will receive an email reviewing the details of your order.

Posh Catering Corporate Lunch 9/30/2021 at 11:15 AM 📌 Confirmation Pending		Delivery On Campus Event Setup By 11:15 AM Event Start Time 12:00 PM Event End Time 1:00 PM Food Pick Up Time 1:30 PM	
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Event #408
Total \$5,796.00 Details >

[📎 Attach Documents](#)
[Event Schedule](#)
[Registration List](#)
[Venue Diagram](#)

[🖨 Print](#)
[✉ Email](#)
[📅 Add to Outlook](#)

Figure 9 - Order Details Options

QUESTIONS?



Contact your on-site catering team for more information.