

QSG: Customer Complete Overview

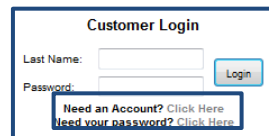
Overview

Welcome to an easier, more effective way to manage catering! This guide will quickly get you up, running, and placing orders. It covers how to:

- Create an Account
- Create an Online Wallet
- Log In
- Create an Order
- Check Out
- Manage Your Orders
- Reset Your Password

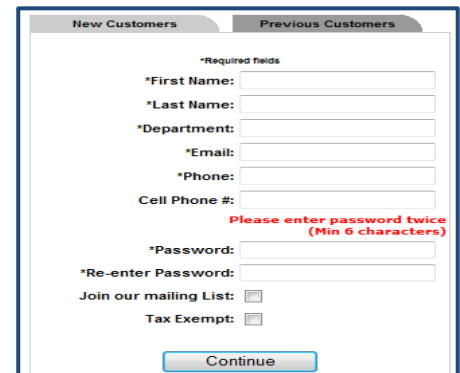
Create an Account

Step 1. From the Home page, select the **Click Here** link next to **Need an Account?**

A screenshot of the 'Customer Login' form. It has fields for 'Last Name:' and 'Password:'. Below the password field, there are two links: 'Need an Account? Click Here' and 'Need your password? Click Here'. A 'Login' button is to the right of the password field.

Step 2. Fill out all of the required information on the **New Customers** tab, and then click **Continue**.

Note: required information is denoted by the asterisk (*) symbol. If you leave any required fields blank, you will see the warning message:

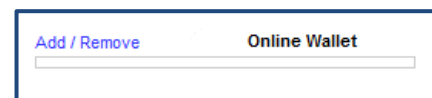
A screenshot of the 'New Customers' registration form. It has tabs for 'New Customers' and 'Previous Customers'. The form includes fields for '*First Name:', '*Last Name:', '*Department:', '*Email:', '*Phone:', and 'Cell Phone #:'. There are also fields for '*Password:' and '*Re-enter Password:'. A red note says 'Please enter password twice (Min 6 characters)'. There are checkboxes for 'Join our mailing List:' and 'Tax Exempt:'. A 'Continue' button is at the bottom.

Congratulations, you have successfully created your account! Your top navigation bar will help you get around your CaterTrax site.



Create an Online Wallet

Step 1. Click on the **Add/Remove** Online Wallet. Then select a **Payment Method**.

A screenshot of the 'Add / Remove Online Wallet' button. It has a blue 'Add / Remove' button and a text label 'Online Wallet' next to it.

Step 2. Use the **Payment Method** dropdown to select the method to be used for this wallet. The screen will dynamically display any additional fields that may be required for the payment method you select.

Step 3. Fill out all required fields and click **Add Wallet Entry**.

Congratulations, you have successfully created an online wallet to use during the checkout process!

Log in to Your Account

Step 1. Type in your **Last Name**.

Step 2. Type in your **Password**.

Step 3. Click the **Login** button.

Congratulations, you have successfully logged in to your account! From here, you can create an order!

Create an Order

Step 1. To begin, select a category you wish to order from.

**Note: Category choices will vary based on your site's offerings*

Step 2. Next, select your options from the list that opens. In our **Lunches** example, you might select the **Deli Trays** option.

Select the lunch options you need

Step 3. Now, make your selection by clicking the **View Details** button. In our **Deli Trays** example, you might select the **Submarine Sandwich Tray**.

Step 4. Next, enter the number of guests.

Step 5. If other items are listed with checkboxes or radio buttons (e.g., beverages, condiments, or extras), make the additional selections that may be associated with this item. Some may be required, others optional.

Step 6. If there is anything else you want the catering office to know about the order, enter a message under **Special Instructions**; otherwise leave that field blank.

Step 7 Click **Order**.

Congratulations, you are ready to check out!

Check Out

Step 1. Take a minute and review your order for accuracy and edit as necessary.

- To remove an item, click the red X.
- To make changes, click **Add More**

- To change the quantity, simply type a new number over the old one.
- When you are ready to move on, click **Continue**.

Step 2. Select date for your order. Once you've selected a date that's **Good to Go**, use the dropdown to select your **Delivery/Pickup** method.

Depending on which pickup/delivery option you choose, you'll be asked to fill out specific information to continue in the ordering process (informational fields may vary, depending on your location).

Pickup:

Delivery / Pickup

*Method: **Pick-up at Cafeteria**

☐ Copy Contact Information

*Contact Name: jeff reinholtz

*Contact Phone:

Event Details

*Earliest Pick-Up Time:

*Latest Pick-Up Time:

*Guest Count:

Tax Exempt: ☐

Contact Information

Cell Phone #:

Note: required information is denoted by the asterisk (*) symbol.

Delivery:

Delivery / Pickup

*Method: **Delivery Off-Campus**

☐ Copy Contact Information

*Contact Name: jeff reinholtz

*Address:

*City:

*State:

*Zip Code:

*Contact Phone:

Event Details

*Food Delivery Time:

*Event Start Time:

Event End Time:

*Guest Count:

Tax Exempt: ☐

Contact Information

Cell Phone #:

Once you have filled out the appropriate fields, click the **Continue** button.

Special Instructions

Continue >>

Step 3. Review your order, and enter an order name if prompted.

- If you want to add another order before you finish checking out, click **Add Another Order**
- If you want to eliminate this order, click **Cancel**.

Otherwise, if you are ready to proceed, click **Continue**.

Step 3

Order Name:

Customer Information		Delivery/Pickup Information	
First Name: jeff	Order Option: Catering	Method: Pick-up at Cafeteria	
Last Name: reinholtz	Contact Name: jeff reinholtz	Contact Phone: 5555556755	
Department: training			
Email: jeff.reinholtz@cateritrax...			
Phone: 585-270-2925			
Event Information			
Guest Count: 20	Pick-up/Delivery Date: Monday, 12/3/2012	Earliest Pick-Up Time: 10:45 AM	Latest Pick-Up Time: 12:00 PM

Description	Quantity	Unit Price	Price Balance
Submarine Sandwich Tray (Lunches, Deli Trays)	20	\$12.00	\$240.00
Assorted Sub Sandwiches served on fresh-baked 6" Sub Rolls and cut in half. Served with your choice of Potato, Macaroni, or Pasta Salad and a Fruit Cup or Hand Fruit.			
Product Cost: \$240.00			
Balance: \$240.00			

<< Add Another Order
Cancel
Continue >>

Step 4. Select your payment method from the drop down.

Complete all of the required information (informational fields will vary, depending on your location and payment method), then click **Process This Order**.

Step 4

Checkout

Please Select a Method for Payment

**Any saved online wallet entries are now listed under the appropriate payment method

*Payment Method: Select

Checkout

Please Select a Method for Payment

**Any saved online wallet entries are now listed under the appropriate payment method

*Payment Method: Cash

*Accept Terms & Conditions: ☒ I Accept the Terms & Conditions

*Initials: jrl

SSL Secure
128-bit encryption

Cancel Process This Order

Manage Orders and Request Changes

Step 1. After you log in to your account, click **My Account** on the home page.

Account Information

JEFF REINHOLTZ

My Acct Log Off

Step 2. Next click on the **Manage Orders** button.

Create New Order

Manage Orders

View My Orders

Points & Coupons

The Manage Orders page gives you an overview of your orders and access to all of the actions you can take related to the orders.

Step 3. Click to view previous orders, repeat an order, or request changes. You can also select a date range and click Search to find an order you placed during that timeframe.

Search by date

Search Field: Search Value: From Date: To Date: Search

View	ID	Amount	Date	Name	Type	Points	Repeat	Change
	44	\$360.00	12/3/2012	Lunch	Catering			
	43	\$4.72	11/30/2012		Take-Out			
	35	\$4.40	11/15/2012		Take-Out			
	34	\$9.44	11/15/2012		Take-Out			
	27	\$12.50	11/12/2012		Floor Stock			

Total: \$391.06

View an order

Repeat an order

Request a change

Note: if the deadline for requesting changes has passed, the **Change** icon will not appear by the order

To Request Changes via Email

Step 1. From the email you received upon placing the order, click the **Request Changes** link.

Step 2. Fill in the appropriate fields and then click on the **Send Change / Update Request** button.


Reminder:

If the deadline for requesting changes has passed, you will not be sent to the **Change / Update Request Form**. Instead, you may see a message that there is insufficient notice for requesting changes.

If you are redirected to the **Add Comments** form, be sure to follow up personally with your Admin regarding any comments you type in that screen and send; comments are not the same as a change request.

Add Comments Form

Use this form to add any comments to this past event. Your message will be emailed to the Catering Manager, and attached to the event for future reference.

INVOICE # 56
 Event Date: 10/30/2013
 Ordered On: 10/29/2013
 Confirmed

Please type your message below:

[Send Comments](#)


Step 3. Review your changes from the updated order history.

[Add to Outlook](#)
[Request Change](#)
[Print Order](#)
[Repeat Order](#)


Order Tracking = Customer generated Tracking Message

ID	DATE	TIME	NAME	COMMENT
52	11/29/2012	3:58 PM	jeff reinholtz	Order confirmed by customer: jeff reinholtz
51	11/29/2012	3:27 PM	jeff reinholtz	Order input by customer: jeff reinholtz

Order Name: Lunch



Catering
(585) 427-8190

ORDER #44
 Monday, 12/3/2012
 Ordered On: 11/29/2012
 Confirmed

[Request Changes](#)
[Print Order](#)


Dear jeff reinholtz,

Thank you for booking your next important event with Catering. We look forward to making your event a delicious affair. **Please do not reply to this email!** *Important* Please review your order below and click on the "Confirm Order" link above to confirm your event. If you need to make changes / updates to your event please use the link at the top of this email. This is the most reliable way to ensure that we have all of the appropriate details for your event.

Change / Update Request Form

Use this form to list any updates, changes or notes to your event. Your message will be emailed to the Catering Manager, and attached to the event for future reference.

Please note that your request should not be considered accepted until it is acknowledged by the Catering Department.

ORDER # 44
 Event Date: 12/3/2012
 Ordered On: 11/29/2012
 Confirmed

☒ Please check this box if you are requesting changes to your event.

You may request your changes on the form below:

Special Instructions

Order Details

Item	Quantity
Submarine Sandwich Tray (Lunches, Deli Trays) Assorted Sub Sandwiches served on fresh-baked 6" Sub Rolls and cut in half. Served with your choice of Potato, Macaroni, or Pasta Salad and a Fruit Cup or Hand Fruit.	30

Delivery / Pickup

*Method: Pick-up at Cafeteria

*Contact Name: jeff reinholtz

*Contact Phone: 5555556755

Event Details

*Earliest Pick-Up Time: 10:45 AM

*Latest Pick-Up Time: 12:00 PM

*Guest Count: 20

Payment Type

*Payment Method: Cash

[Send Change / Update Request](#)

Congratulations!

You can see how easy it is to manage your orders and request changes!

Reset Your Password

Step 1. Use the **Click Here** link on the login screen next to **Need your password?**

Step 2. Type the last name and email address associated with your account, then click **Send**.

Step 3. Go to your email inbox, open the email sent to you by the CaterTrax System, and click the link.

Step 4. Enter your new password twice, once next to **New Password**, and again next to **Confirm Password**. Click **Update**

Congratulations!

You may return to the login screen and log in with your new password!