

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:

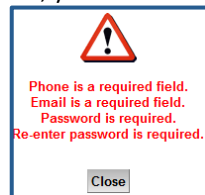
- Create an Account
- Create an Online Wallet
- Log In
- Create an Order
- Check Out
- Manage Your Orders
- Reset Your Password

Create an Account

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

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:



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



Welcome jeff!

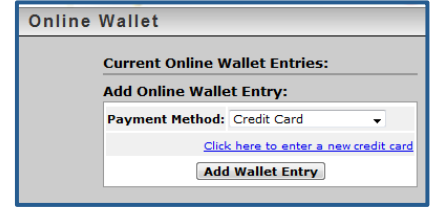


Create an Online Wallet

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

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**.



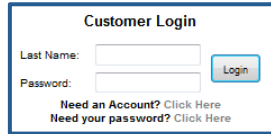
Congratulations, you have successfully created an online wallet to use during the checkout process!

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

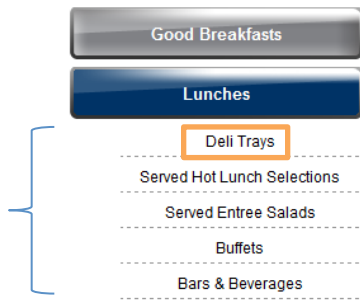
Step 1. To begin, select a category you wish to order from.

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

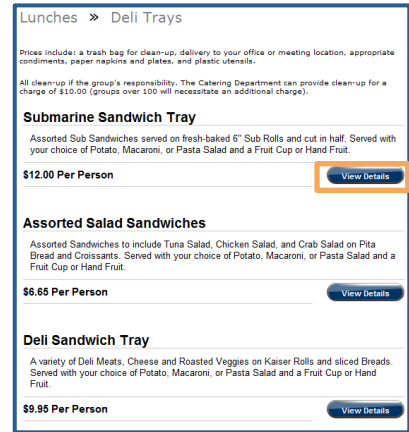


Step 2. Next, select your options from the list that opens. In our **Lunches** example, you might select the **Deli Trays** option.

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**.



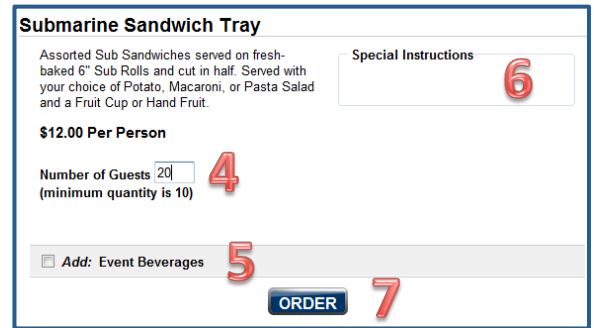
Step 4. Next, enter the number of guests.

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**.

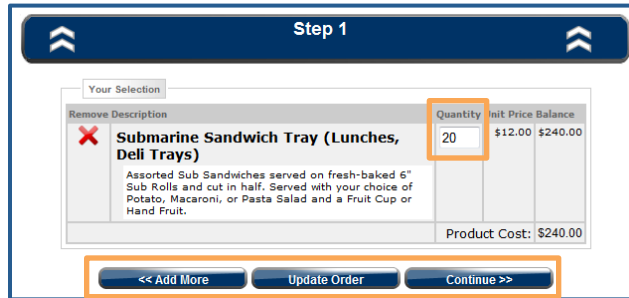
Congratulations, you are ready to check out!



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**

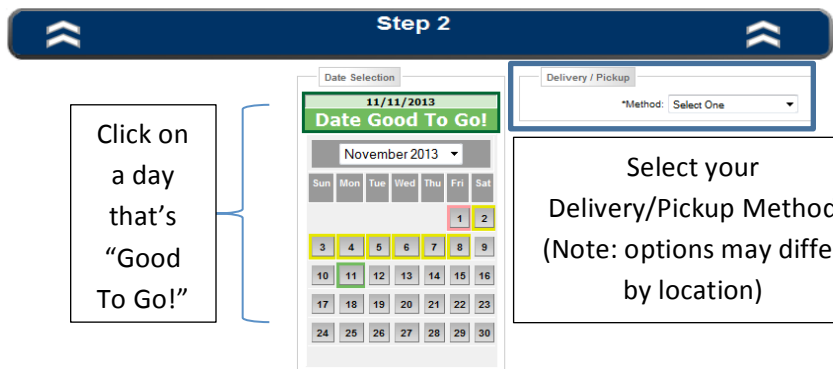


- To change the quantity, simply type a new number over the old one.
- When you are ready to move on, click **Continue**.

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.

- Note:** red days are not available for ordering and yellow days require that you call in your order.
- 11/29/2012**
*Please Note: We are unable to accept orders on such short notice. Please call the catering office at (xxx) xxx-xxxx to discuss your catering request.
- 11/30/2012**
WARNING!
*Please Note: You may proceed, but due to short notice, you must contact the Catering Office at (xxx) xxx-xxxx for a verbal confirmation.

Click on a day that's "Good To Go!"



Select your Delivery/Pickup Method (Note: options may differ by location)

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 #:

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 #:

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

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**.

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: 6555556755	
Department: training			
Email: jeff.reinholtz@catertrax...			
Phone: 685-270-2926			
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
Submarine Sandwich Tray (Lunches, Deli Trays)		20	\$12.00
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.			\$240.00
			Product Cost: \$240.00
			Balance \$240.00

[<< Add Another Order](#)
[Cancel](#)
[Continue >>](#)

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

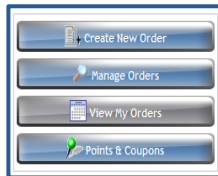
Complete all of the required information (informational fields will vary, depending on your location and payment method), then click **Process This Order**.

Manage Orders and Request Changes

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



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



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.

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

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:

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

ID	DATE	TIME	NAME	COMMENT
S2	11/29/2012	3:58 PM	jeff reinholtz	Order confirmed by customer: jeff reinholtz
S1	11/29/2012	3:27 PM	jeff reinholtz	Order input by customer: jeff reinholtz

Order Name: Lunch

your
Logo goes here

Catering
(888) 427-8190

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

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) <small>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.</small>	30

Delivery / Pickup

*Method:

*Contact Name:

*Contact Phone:

Event Details

*Earliest Pick-Up Time:

*Latest Pick-Up Time:

*Guest Count:

Payment Type

*Payment Method:

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?**

Customer Login

Last Name:

Password:

Login

Need your password? Click Here

Creating an account is free and easy. You will enjoy many benefits including a quick checkout and exclusive offers. Please fill in the following fields. Please note that fields preceded by * are required.

Sincerely,
The Management Team

New Customers Previous Customers

Last Name:

Password:

Login

Need your password? Click Here

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

Forgot your password?

Enter your last name and email address below and your password will be sent to your email.

Last Name

Email

Send

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

Reset Your CaterTrax Password

CaterTrax System <noreply@catertrax.com>

Sent: Thu 11/15/2012 11:38 AM

To: Jeff Reinholtz

Please click on the link below to update your password.
Your link is only valid for 1 hour.
<https://suite.catertrax.com/shopmailpwd.asp?action=validate&Token=fb65c5bd2cebe9f3a5f0153285197232&ID=42e8fd63dfe82a48f309da9aec6ab61a>

Note: if you do not see the email in your inbox, check your spam folder!

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

Fill in your new password you wish to use.

Last Name : reinholtz

Email : jeff.reinholtz@catertrax.com

New Password:

Confirm Password:

Update

Congratulations!

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