



All Day Ordering

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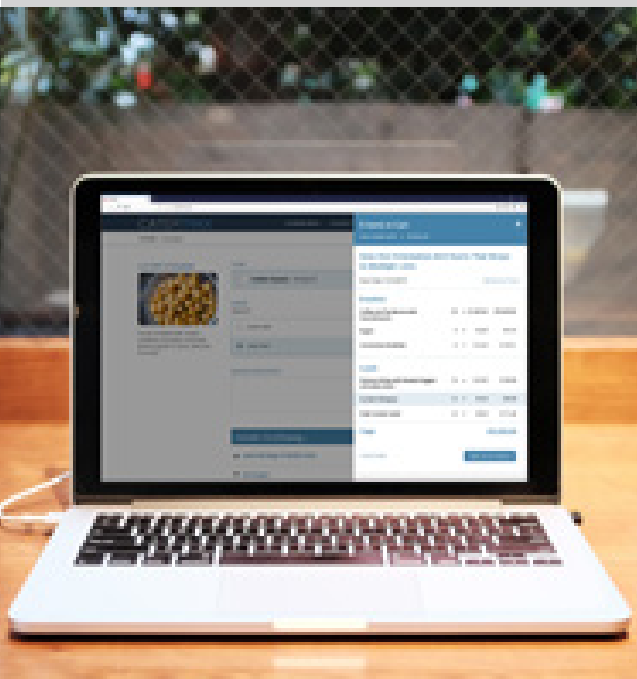
Introduction

This comprehensive user guide will explain how to use the following features of the TRAX Platform:

All Day Ordering allows customers to place one catering order for multiple service times, tied together in one Master Invoice that can be viewed, printed, and emailed.

The Manage Orders Page has been redesigned to help organize all of the existing functions and give customers access to Master Invoices created by the administrator or through All Day Orders.

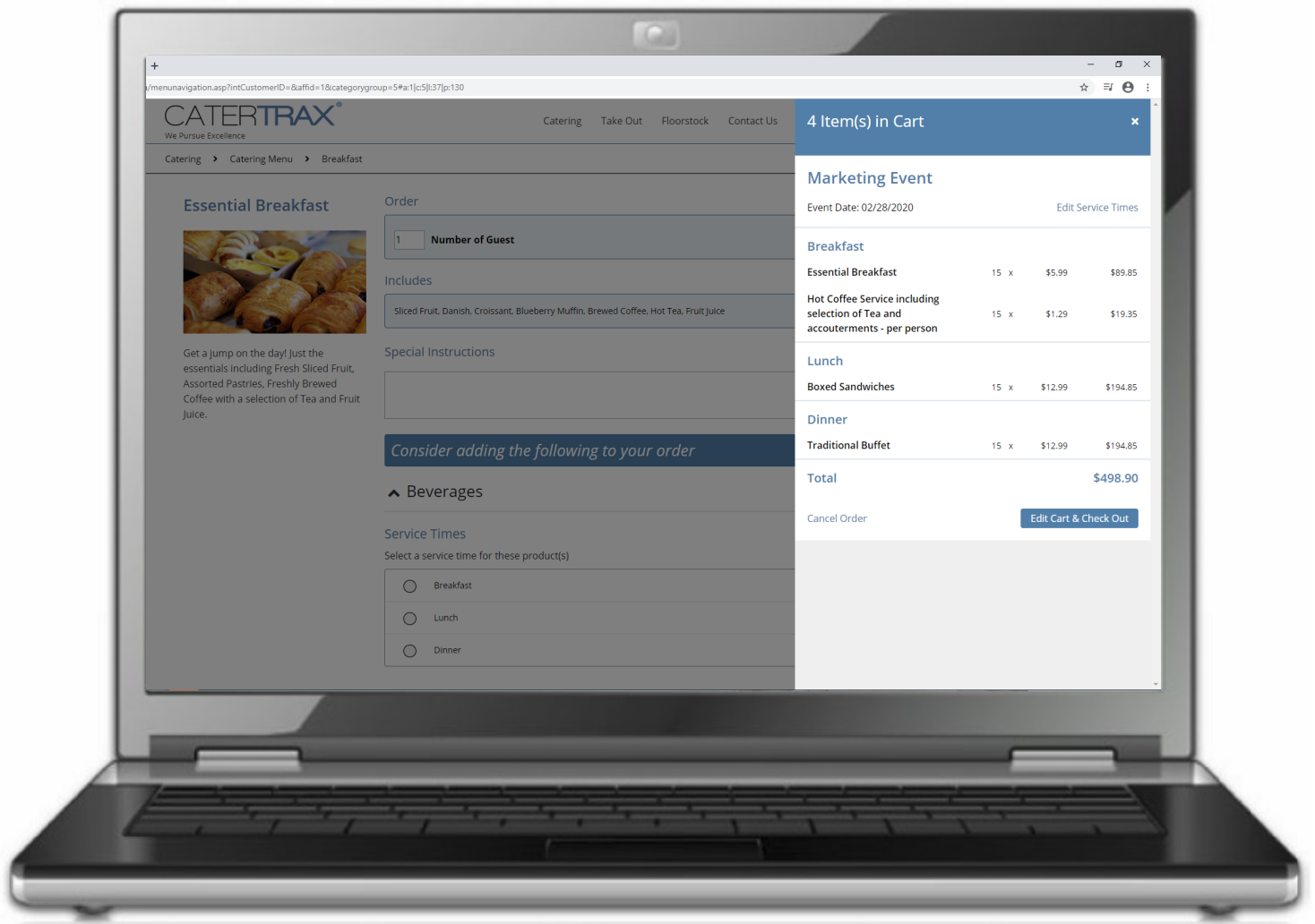
A Cart has been added to quickly display all items in your order, and allows you to easily navigate to related items or the entire menu.



Placing an All Day Order

Using All Day Ordering, you can place one catering order for multiple service times. Once the order is complete, a Master Invoice will be generated that can be viewed, printed, and emailed. This guide will cover:

- How to Access the All Day Ordering Interface
- How to Start an All Day Order
- How to Add Products to an All Day Order
- How to Change a Single Service Order into an All Day Order
- How to Review Your All Day Order in the Cart
- The Check Out Process
- The All Day Order Becomes a Master Invoice

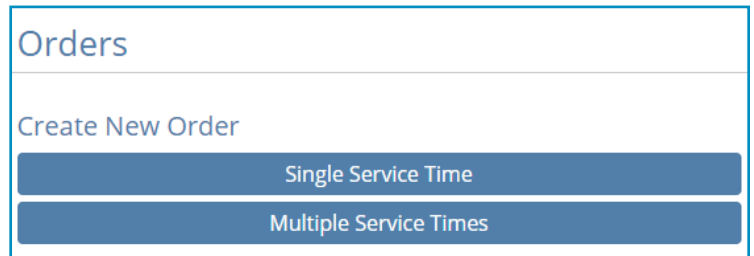


How to Access the All Day Ordering Interface

Your Online Ordering Experience offers several ways you can begin an All Day Order.

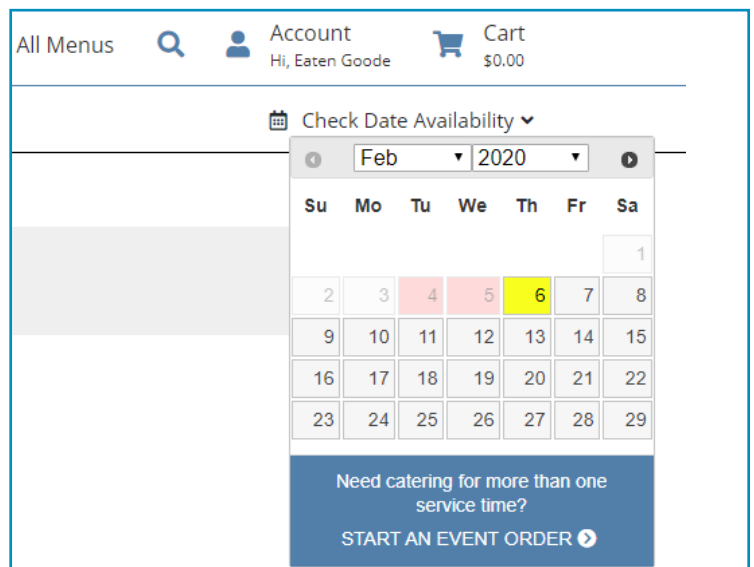
Account View

The "Single Service Time" button will act as the previous "Create New Order" button. The "Multiple Service Times" button will begin an All Day Order.



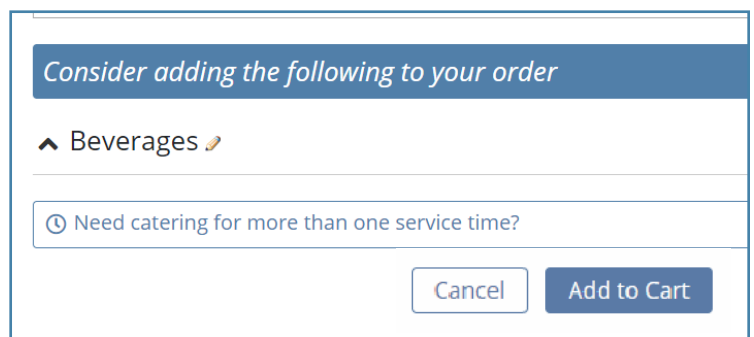
Menu View

The "Check Date Availability" button can be seen at the top of the page while browsing your menu. This button will still display the color-coded availability on the calendar view, but now you can select the "Start an Event Order" option to begin an All Day Order.



Product View

If you already have a product selected and are ready to order, above the "Add to Cart" button, you can select the "Need catering for more than one service time?" button to set up your All Day Order.



How to Start an All Day Order

After selecting one of the options, the All Day Order Interface will open for you to start filling out the appropriate fields:

The screenshot displays the 'All Day Order' interface. It is divided into three main sections: 'Event Details', 'Service Times', and 'Browse the Menu'.
1. **Event Details:** This section contains two input fields. The first is labeled '* Event Date' and contains the text '02/29/2020' with a calendar icon to its right. The second is labeled '* Guest Count' and contains the number '40'.
2. **Service Times:** This section is titled 'Service Times' and includes the instruction 'Add a description for each service time.' Below this, there are four input fields, each labeled '* Service Name'. The first three contain 'Breakfast', 'Lunch', and 'Drink Refresh' respectively. The fourth contains 'Dinner'. Each field has a trash icon to its right.
3. **Browse the Menu:** This section is titled 'Browse the Menu' and includes the instruction 'Select products from the menu and then add them to the service times you've created.' At the bottom of the interface, there are two buttons: 'Cancel' and 'Create'.

Select the date and the total guest count for your event

Type in the Event Name, which will serve as the name of your All Day Order

NOTE: You will set the actual times of service for each of these events during the Check Out Process

Type in a name for each of your Service Times. Use this button to add up to a total of 6 Service Times

Select the "Create" button to begin your order

How to Add Products to an All Day Order

Now that you have started your All Day Order, you can begin to add products to the different service times.

Consider adding the following to your order

^ Beverages 🍷

Service Times

Select a service time for these product(s) [Edit Service Times](#)

Breakfast

Lunch

Drink Refresh

Dinner

When ordering a product, there will be a new selection feature located above the “Add to Cart” button. This selection will display all of the Service Times that you set for your All Day Order. You must select one of those Services Times to add the product to your cart.

You can also select “Edit Service Times” to reopen the All Day Ordering Interface to delete, add, or edit services times.

Service Times

Add a description for each service time.

* Service Name

Breakfast

* Service Name

Lunch

Items for this service time will be removed from the cart.

If you use the trash can icon to delete a Service Time that has no products assigned to it, the Service Time will be deleted.

If you try to delete a Service Time that currently has products assigned to it, you will be asked to confirm. This is because deleting a Service Time will remove any items assigned to it from your cart.

How to Change a Single Service Order into an All Day Order

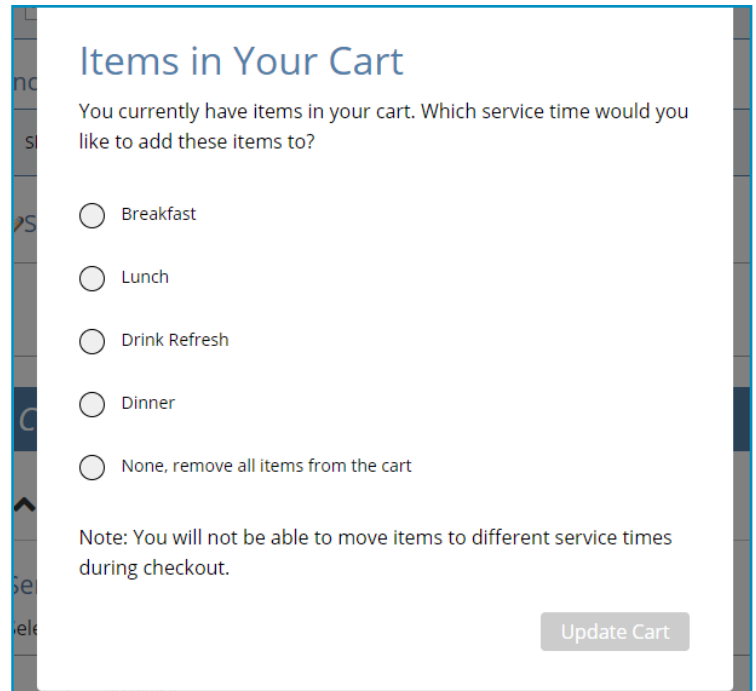
You may start with a Single Service Time Order and determine that you would like to change it into a Multiple Service Time Order. Rather than start over, you can easily change to an All Day Order.

If you already have items in your cart, start by using any of the methods found in the “How to Access the All Day Ordering Interface” section of this guide.

After filling out all of the required fields, you will be prompted to select which service time you would like to move your current cart into. You can also select none and start over with an empty cart.

You cannot split your cart so that some products move into one service time and the rest move into another.

NOTE: All products in an All Day Order must come from the same menu.



The screenshot shows a dialog box titled "Items in Your Cart". The text inside reads: "You currently have items in your cart. Which service time would you like to add these items to?". Below this text are five radio button options: "Breakfast", "Lunch", "Drink Refresh", "Dinner", and "None, remove all items from the cart". At the bottom of the dialog, there is a note: "Note: You will not be able to move items to different service times during checkout." and an "Update Cart" button.

How to Review Your All Day Order in the Cart

4 Item(s) in Cart ×

Marketing Retreat

Event Date: 02/29/2020 Edit Service Times

Breakfast

Essential Breakfast	40 x	\$5.99	\$239.60
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Lunch

Boxed Sandwiches	40 x	\$12.99	\$519.60
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Drink Refresh

Hot Coffee Service including selection of Tea and accouterments - per person	40 x	\$1.29	\$51.60
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Dinner

Traditional Buffet	40 x	\$12.99	\$519.60
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Total \$1,330.40

[Cancel Order](#) [Edit Cart & Check Out](#)

The All Day Order name and Event Date will display at the top

Each Service Time will have its own heading and Invoice total

Click this button to begin the Check Out Process!

NOTE: You can review the other features of the Cart in the "Cart Interface" section of this guide.

The Check Out Process

Step 1 - Review or Edit the Order

* Service Time Label

Lunch

Remove	Description	Quantity	Unit Price	Balance
	Boxed Sandwiches Working Lunch? We will provide you with a healthy meal to keep you motivated. Select your Sandwich, Side, and Beverage. Includes Condiments, Utensils, Plates and Napkins. <ul style="list-style-type: none">Turkey and Cheddar on Marble Rye Bread with Leaf Lettuce and Heirloom TomatoesChicken Salad made with Greek Yogurt, Dried Cranberries, Slivered Almonds, Celery and Red Onion on CroissantSeasoned Roast Beef with Havarti Cheese and Horseradish Aoli on Product Components <ul style="list-style-type: none">Sandwich SelectionSide SelectionsAssorted Bottled BeveragesAppropriate Condiments Kitchen Notes [BOXED LUNCH], Condiments, Utensils, Plates, Napkins	40	12.99	\$519.60

Product Group: Food

[Recalculate](#) Product Cost: \$519.60

Each Service Time will become its own order that you can review, edit, or remove items from. You can use the trash can icon to delete a Service Time from an All Day Order. Any products from these Service Times will be removed from your cart.

* Service Time Label

Lunch

Service times with no products will be removed from the order when you continue to the next step.

* Service Time Label

Drink Refresh

Remove	Description	Quantity	Unit Price	Balance
	Hot Coffee Service including selection of Tea and accouterments - per person	40	1.29	\$51.60

If you remove all of the products but don't delete the Service Time, once you continue onto Step 2 of the Check Out Process, that Service Time will be deleted.

NOTE: If you only have two Service Times, and delete one from this page, your order will automatically update to a Single Service Time Order.

The Check Out Process

Step 2 - Order Details

Date Selection

2/29/2020
This date is available.

February 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Event Name

Order Name:

Default Delivery / Pickup Info

*Method:

*Delivery Contact:

*Delivery Phone:

*Building:

*Room # / Name:

Default Special Instructions

At the top of the Order Details page, you can select your method of delivery. You will also set the Default Contact, Phone Number, and Delivery Location. These defaults will apply to all of your Service Times.

Service Times

Set service times, guest count or alternate delivery information.

Breakfast

Event Details

Additional service times may be available by prior arrangement. Please contact us to discuss your needs.

*Food Delivery Time:

*Event Start Time:

*Event End Time:

*Food Clean-up Time:

*Guest Count:

Modify Delivery / Pickup Information for this Service Time

Modify Special Instructions for this Service Time

Drink Refresh

Event Details

Additional service times may be available by prior arrangement. Please contact us to discuss your needs.

*Food Delivery Time:

*Event Start Time:

*Event End Time:

*Food Clean-up Time:

*Guest Count:

For each Service Time, you will enter the specific Delivery Time information. You can also modify the guest counts for each Service Time.

If you need to edit some of the default information for specific Service Times, you can use the Modify Delivery / Pickup Information tab.

The Check Out Process

Steps 3 - Order Summary

Marketing Retreat

Customer Information	
First Name:	Eaten
Last Name:	Goode
Department:	Education
Email:	training@catertrax.com
Phone:	555-555-5555


Service Times

Breakfast

Delivery / Pickup Information	Event Information
Ordering Option: Catering Method: Delivery	Guest Count: 40 Pick-up/ Delivery Date: Saturday, 2/29/2020

The Order Summary page will give you one last chance to review the order details and contact information for each Service Time before moving on to select your Payment Method.

Steps 4 - Payment Method

*Payment Method:	Cost Center ▾
Online Wallets:	Cost Center 123456789 ▾
*Approval Email Address:	Accounting Dept. CATERUSER@catertrax.com ▾
CC Additional People (Optional):	
<small>email address(es)</small> You may CC others on this order's correspondence (Please separate multiple email addresses with semicolons)	<input type="text"/>
<input type="checkbox"/>	Do NOT Send Email to Customer
	
<div style="text-align: right;">Return to Summary Cancel Process 4 Orders</div>	

Since all of your Invoices are grouped into one All Day Order, you can only use one Payment Method. Select your method of payment, and then select "Process Orders". The number in that button will vary depending on the number of Service Times in your All Day Order.

The All Day Order Becomes a Master Invoice

After completing the order, the All Day Order is grouped together as a Master Invoice. You will be given a Master Invoice ID that you can use to review on the new Manage Orders page.

If you would like to print or send information relating to the entire All Day Order, use these two buttons located at the top.

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.

Master Invoice #216 | Marketing Retreat
Created: 02/06/2020 | 4 Services | Location: Catering

Total	Balance Due \$1,430.40
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[Printable Master Invoice](#) [Email Master Invoice](#)

[Printable Invoice](#) [Email Invoice](#) [Add to Outlook](#) [Print Kitchen Sheet](#)

CATERTRAX® Catering

Order Name: **Breakfast**

MASTER INVOICE # 216
Marketing Retreat | Service 1 of 4

Since each Service Time still acts as its own order, you will have the option to print, email, or add the order to your Outlook calendar.

Each Service Time order will also be labeled with the Master Invoice ID, the All Day Order Name, and which service number of the day it is.

Customer Manage Orders Page

The **Manage Orders Page** has been redesigned to help organize all of the existing functions and give customers access to view Master Invoices created by the administrator.

We will go through what all of the new icons mean, where some functionality has moved, and how the new functionality can make managing your account easier.

◀ Manage Account | Manage Orders

Manage Orders

Invoices Master Invoices

8 Upcoming Orders Reset Filters | View Calendar

ID	Event Date	Name	Paid	Processed	Total	Action
238	2/8/2020	Catering Order 1			\$167.80	
233	2/29/2020	Breakfast Marketing Retreat Service 1 of 4			\$264.60	
234	2/29/2020	Lunch Marketing Retreat Service 2 of 4			\$544.60	
235	2/29/2020	Drink Refresh Marketing Retreat Service 3 of 4			\$76.60	
236	2/29/2020	Dinner Marketing Retreat Service 4 of 4			\$544.60	
231	3/11/2020	Catering Order 2 March Weekly Orders			\$310.60	
239	3/18/2020	Catering Order 3 March Weekly Orders			\$310.60	

Invoices Page

Manage Orders

Invoices Master Invoices

12 Upcoming Orders

ID	Event Date	Name
238	2/8/2020	Catering Order 1




The Manage Orders page will begin on the Invoices tab, which provides a list of all Invoices in that customer's name. Customers will now have access to view Master Invoices that are created by site administrators in the "Master Invoices" tab.





Order ID

To review an invoice's order summary, select that invoice's Order ID.

Master Invoice Icon

There is a new icon that indicates if that order is part of a Master Invoice. The icon also acts as a button that opens the Master Invoice Interface for that order.

ID	Event Date	Name
238	2/8/2020	Catering Order 1
231	 3/11/2020	Catering Order 2 March Weekly Orders
239	 3/18/2020	Catering Order 3 March Weekly Orders
240	 3/25/2020	Catering Order 4 March Weekly Orders

Paid	Processed	Total	Action
		\$245.65	 
		\$310.60	 

Repeat Order

This button can be used to load all of the same items into a new cart, so you can quickly repeat a popular order.

Change Request

This button allows you to submit a change request or cancel an order up to 24 hours before the event. The Catering Team will be alerted of these changes, and will follow up if they can be accommodated.

Master Invoices Page

Invoices Master Invoices

Only show invoices with a balance due Reset Filters

ID	Created Date	Name	Location	Totals	Payments	Refunds	Balance Due
151			All				
151	2/4/2020	March Weekly Orders	Catering	\$866.85	\$0.00	\$0.00	\$866.85

Master Invoices can be created by the site administrator to help group invoices together. Each Master Invoice is given its own Master Invoice ID Number and Name. It will also display the total balance of all of the invoices added together. Just like on the Invoice Tab, you can view the Master Invoice Interface by clicking the ID Number.

◀ Manage Account | Manage Orders | Master Invoice

Master Invoice #151 | March Weekly Orders
Created: 2/4/2020 | Location: Catering

Totals	Master Invoice Total	Payments	Refunds	Balance Due
	\$866.85	\$0.00	\$0.00	\$866.85

[Email](#) [Print](#)

[Invoice Summary](#) [Payment Details](#) [Invoice Details](#) [Invoice Tracking](#)

The top of the interface will display the Master Invoice ID Number and Name. Below that, it will show the date that the administrator grouped the orders, and which menu they were ordered from. You can use the email and print options at the top to send information about the entire Master Invoice.

Email Master Invoice

When you select the "Email" button, the recipient will default to the email on the Customer Account, but you can add more. The Subject will default to the Master Invoice ID and Name, but this can be changed.

Customer | 30 Eaten Goode

* Send Email To (separate multiple email addresses with a semi-colon)

Subject

Message Body

* Include
 Invoice Summary
 Invoice Details (including products)

[Cancel](#) [Preview](#)

1:04 PM

Invoice Summary Tab

								Email	Print ▾
Invoice Summary		Payment Details	Invoice Details	Invoice Tracking					
ID	Event Date	Name	Status	Pay Method	Total	Payments	Refunds	Balance Due	
231	3/11/2020	Catering Order 2	Confirmed	Cost Center 123456789	\$310.60	\$0.00	\$0.00	\$310.60	
239	3/18/2020	Catering Order 3	Confirmed	Cost Center 123456789	\$310.60	\$0.00	\$0.00	\$310.60	
240	3/25/2020	Catering Order 4	Confirmed	Cost Center 123456789	\$245.65	\$0.00	\$0.00	\$245.65	
TOTALS:					\$866.85	\$0.00	\$0.00	\$866.85	

The Invoice Summary tab will show you a brief summary of all the invoices that are grouped in the Master Invoice. While this page does display the Balance Due for each invoice, payments cannot actually be applied on this page.

\$310.60	\$500.00	\$189.40	\$0.00
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If a payment has been applied to an order, the number will appear in **Red**. If a refund has been applied to an order, the number will appear in **Green**.

Payment Details Tab

Invoice Summary		Payment Details	Invoice Details	Invoice Tracking					
Catering Order 2									
ID	Event Date	Name	Status	Pay Method	Total	Payments	Refunds	Balance Due	
231	3/11/2020	Catering Order 2	Confirmed	Cost Center 123456789	\$310.60	\$0.00	\$0.00	\$310.60	
Transactions	Payment Date	Type	Pay Method	Amount					

The Payment Details Tab will list out the different Payment Status and Payment Methods for each invoice. It will also keep a record of any transactions and refunds applied to each order.

Invoice Details Tab

Invoice Summary Payment Details Invoice Details Invoice Tracking

Catering Order 2

ID	Event Date	Name	Status	Pay Method	Total	Payments	Refunds	Balance Due
231	3/11/2020	Catering Order 2	Confirmed	Cost Center 123456789	\$310.60	\$0.00	\$0.00	\$310.60

Customer Information

First Name: Eaten
Last Name: Goode
Department: Education
Email: training@catertrax.com
Phone: 555-555-5555

Delivery Information

Ordering Option: Catering
Method: Delivery
Room # / Name: 1

Payment Information

Payment Method: Cost Center | 123456789

Event Information

Guest Count: 20
Pick-up/ Delivery Date: 3/11/2020
Food Delivery Time: 3:30 PM
Event Start Time: 4:00 PM
Event End Time: 6:00 PM
Food Clean-up Time: 6:30 PM

FOOD	Qty.	Price	Ext.
Traditional Buffet <small>Traditional Buffet for any event. Garden Salad with your choice of two Dressings, Oven Roasted Herb Chicken, Baked Ziti, choice of Italian Sausage with Peppers and Onions or Meatballs Marinara, Salt</small>			

Rather than look into each invoice individually, you can select the Invoice Details tab to review the Order Summaries for all orders that are part of that Master Invoice. This will let you review Delivery Information, Event Information, and the Carts of all of these Invoices. If you want to submit a change request, repeat this order, add to your calendar, or print a single invoice, you can click on the individual invoice ID.

Invoice Tracking Tab

Invoice Summary Payment Details Invoice Details Invoice Tracking

Invoice Information		Tracking Messages			
ID	Name	ID	Date / Time	Name	Comment
231	Catering Order 2	68	2/4/2020 1:04 PM	Control	Invoice #231 added to the Master Invoice #151 March Weekly Orders
239	Catering Order 3	67	2/4/2020 1:04 PM	Control	Invoice #239 added to the Master Invoice #151 March Weekly Orders

The Invoice Tracking Tab will provide a log of all status updates, change requests, payments, refunds, and comments for each invoice throughout the order process.

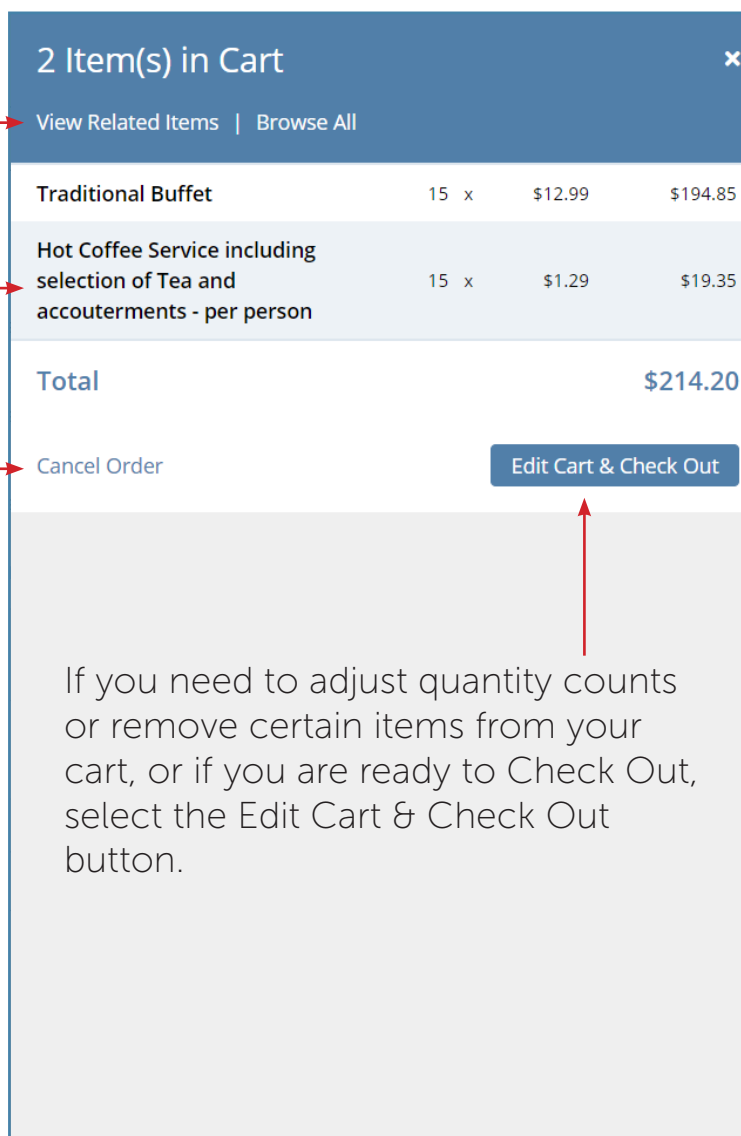
Changes to the Cart Interface

The Cart has been updated to provide easier navigation back into the menu, and to easily display the items currently in your order. The cart will appear anytime you add a new product to your order.

The "Browse All" link will direct you to the Category Grid page so you can easily select a new Category to access the rest of the menu. The "View Related Items" link will return you to the Category of the product that was just ordered to add more to your order.

You can tell which item was just ordered because it will be highlighted in your cart. In this example, the Hot Coffee Service was the last product added.

If you want to cancel your order to start from scratch, just select the "Cancel Order" button.



The screenshot shows a mobile cart interface with the following elements:

- Header:** "2 Item(s) in Cart" with a close button (X).
- Navigation:** "View Related Items" and "Browse All" links.
- Item 1:** "Traditional Buffet" (15 x \$12.99 = \$194.85).
- Item 2 (highlighted):** "Hot Coffee Service including selection of Tea and accouterments - per person" (15 x \$1.29 = \$19.35).
- Total:** \$214.20.
- Buttons:** "Cancel Order" and "Edit Cart & Check Out".

Annotations with red arrows point to:

- "View Related Items" link.
- The highlighted "Hot Coffee Service" item.
- "Cancel Order" button.
- "Edit Cart & Check Out" button.

If you need to adjust quantity counts or remove certain items from your cart, or if you are ready to Check Out, select the Edit Cart & Check Out button.