

How to Navigate the Administrative Site

In this guide you will find how to:

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Understand the navigation icons

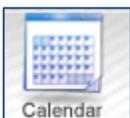
From the CaterTrax administrative site, the pane at the top of your screen displays the navigation icons which are applicable to your site and access rights (your view may vary).



Click **Config** to access various features available to you. Refer to separate guides for how to use these (e.g., reports, mass email, menu map, coupons, surveys, etc.).



Click **New Order** to create an order for a new or existing customer.



Click **Calendar** to view and manage orders from a familiar calendar format (this may be the default “home” page for your CaterTrax Administrative site).



Click **Feedback** to manage feedback from your customers.



Click **Customers** to look up and manage an existing customer's account or create a new one.



Click **Live Orders** to view the "Live Order Monitor" which dynamically displays all orders for the current day.



Click **Home Page** to view the customer facing section of your CaterTrax site.



Click **View Today** for details about a specific day and access tools that help keep your operation running smoothly (e.g., reports, kitchen and cover sheets, etc.).



Click **Support** to connect with your CaterTrax Support team and access our message center.



Click **TRAX Learning** to access resource guides, like this one, which explain how to use your CaterTrax administrative site and your customer site.



Click **Log Off** for security when you are not using the administrative site.

Search for an order by ID number

When you know the order ID number, you can quickly use the administrative search feature on the left navigation pane:

1. In the search field, type the ID number.
2. Click the **Go** button to display the order.



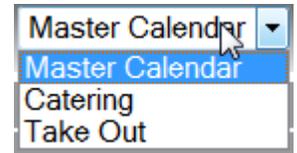
View orders in the main calendar pane

When you know the date of an order and/or just want to use the familiar calendar view, you can easily navigate to an order.

1. Click the **Calendar** icon in the top navigation pane.



2. *If multiple locations or CaterTrax solutions exist on your site* (e.g., floor stock, take-out, café 1, café 2), you may use the **Master Calendar** dropdown to select only one and filter out other orders; otherwise, this option will not be displayed on your calendar.



3. To navigate to the month on which an order occurs, click the scroll arrows backward or forward. Alternatively, select the month and year from the dropdowns and click **Go**.



4. Click on the order information to display the order.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week View	<< Previous Month			1 View	2 View	3 View Invoice# 100 Guest C 11:45 AM \$5.98	4 View
Week View	5 View	6 View	7 View Invoice# 108 ! A Smith 5:00 PM \$5.98 Invoice# 109 ! A Smith 5:30 PM \$6.21 Invoice# 110 ! A Smith 5:30 PM \$5.98	8 View Invoice# 111 ! A Edgecomb 9:00 AM \$32.68 Invoice# 112 ! A Smith 9:00 AM \$8.71	9 View	10 View	11 View
Week View	12 View	13 View	14 View	15 View	16 View	17 View	18 View
Week View	19 View	20 View	21 View	22 View	23 View	24 View	25 View
Week View	26 View	27 View	28 View	29 View	30 View	31 View	Next Month >>

Zoom to orders for a specific day

When you want to zoom right to orders for a specific day, there are three simple methods:

1. Click the **View Today** icon in the top navigation bar to zoom to all orders for the current day.



- From the calendar page, click the **View** link next to a day to display the order(s) for that day.

8 **View**

Invoice# 111 !
A Edgcomb
9:00 AM
\$32.68

Invoice# 112 !
A Smith
9:00 AM
\$8.71

- From the calendar page three-month left navigation pane, click a day to display the order(s) for that day.

« Jan 2014 Go »

January 2014

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	30	31	

February 2014

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	

March 2014

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
30	31					

View orders for a specific week

To see all of the orders for a specific week, use the quick launch button on the main calendar.

- From the **Calendar** icon in the top navigation pane, navigate to the month in which you want to see a week's order.
- Click the **Week View** button.

Week View	19 View	20 View	21 View	22 View	23 View	24 View	25 View
					 Invoice# 119 Trax A 7:45 AM \$87.09	 Invoice# 117 Trax A 7:30 AM \$87.09	
						 Invoice# 120 Trax A 7:45 AM \$48.94	

Congratulations, you are now able to use each of the basic site icons and options to navigate the CaterTrax Administrative site!

Need Help?

Q: *Why am I missing an icon or option that is described in this guide?*

A: Not all of the icons and options defined in this guide may be available to you based on your site's setup and your access rights. If you believe the site or access rights are incorrect, feel free to contact the CaterTrax support team.

Q: *How do I contact the CaterTrax support team?*

A: You may utilize any of the following three ways to contact CaterTrax support team to get your issue resolved:

- Place a **Support Request** from your CaterTrax administrative site.
- Call 1 (585) 935-7105
- Email support@catertrax.com

