

## MANAGING YOUR ONLINE WALLET

Managing your online wallet allows you to process your orders faster and give you back time in your day. Saving a frequently used payment method, either before or during an online order, gives you the ability to quickly checkout on future orders by selecting from your accounts saved payment methods.

#### **Accessing Your Online Wallet**

To start, visit your CaterTrax website and sign or create your account.

- 1. You can access the Manage Online Wallet from the Account drop-down. (Figure 1)
- 2. You can also manage your payment methods under the **Online Wallet** section on your

#### My Account page. (Figure 2)

**Note**: The methods of payment available on your account are specific to your site and may differ from those displayed within this guide.

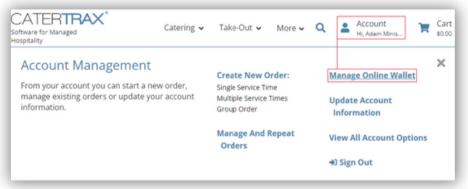


Figure 1 - Mange Online Wallet Drop-Down

Welcome, Adam	וי	Orders	
Add Online Walle	t Entry:		
Payment Method:	Select		Single Service Time
	Select		Multiple Service Times
	Cost Center		Group Order
	Check Budget Management Card		anage and Repeat Orders Calendar View
4		, Online Wallet	
		Current Online Walle Cost Center   Original	
		Add Online Wallet Er Payment Method: 🛐	

Figure 2 - Account Online Wallet Options.

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## MANAGING YOUR ONLINE WALLET

#### ADDING TO YOUR ONLINE WALLET

1. To add a method, select the appropriate payment information from the drop-

down list. (Figure 3)

2. Enter the applicable payment details, then click Add Wallet Entry.

a. Check the confirmation message to verify that your card was added

successfully. (Figure 4)

**Note**: Some payment methods, such as a credit card where a form will load in a new window, or a cost center where a field or set of fields will appear that are required to complete adding or modifying online wallet entries.

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NCST5474			
L			
Vallet Entry			

**Note**: If the credit card payment information form does not automatically open in a new window, select the link to Click here to enter a new credit card.



Figure 3 - Add Online Wallet Entry Drop-down

Add Online Wallet Entry: Your Payment Method was added so Payment Method: Card	uccessfully.
*Card Details: 1234 Enter Cord Information	
Add Wallet Entry	

Figure 4 - Add Wallet Entry and Confirmation

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## MANAGING YOUR ONLINE WALLET

### ADDING TO YOUR ONLINE WALLET DURING CHECKOUT

You can also add payment methods to your Online Wallet during checkout.

1. During Step 4, enter the payment method details, then check the box to save your

payment. (Figure 5)

2. Complete the checkout process to finish your order.

Any saved online wallet entries are now list	ted under the appropriate payment method
*Payment Method:	Card ~
Online Wallets:	New Wallet Entry
*Card Details: Enter Card Information	*********4323
Save Wallet Entry for Future Use:	

Figure 5 - Save Wallet Entry for Future Use Checkbox

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## MANAGING YOUR ONLINE WALLET

#### MODIFY OR REMOVE ONLINE WALLET ENTRY

To remove an old or unused payment method click on the Delete icon. (Figure 6)

If you need to update a payment much such as a card expiration date, click on the

Modify icon. (Figure 6)

Online Wallet	
+Add Online Wallet Entry Current Online Wallet Entries:	-
Cost Center   Original Payment Method	Remove Saved Entry
ending with   456698563125457	in Remove Saved Entry
Modify Original Payment Method:	
Payment Method: Cost Center	Modify Saved Entry
*Cost Center Number:	
Modify Wallet Entry	
Modify Wallet Entry	

Figure 6 - Modify or Remove Online Wallet Entry

### **QUESTIONS?**



Contact your food services team for support.