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.
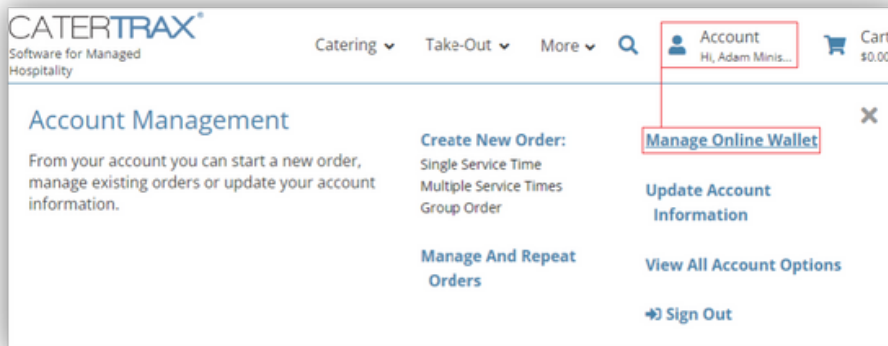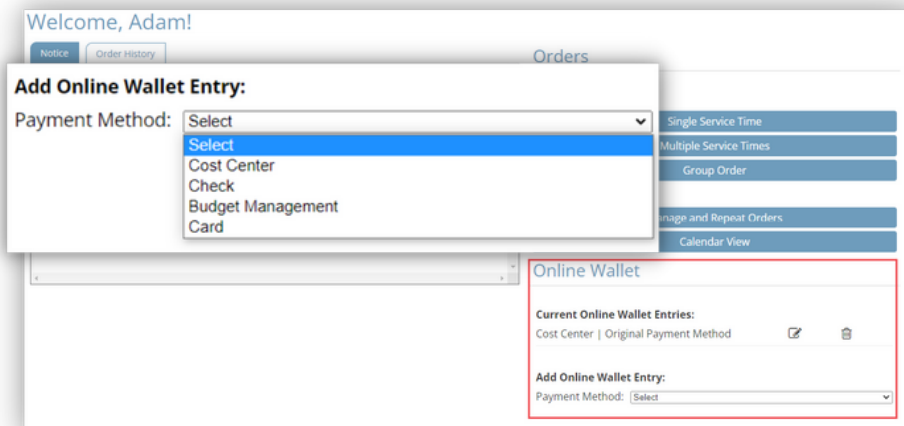

Figure 1 - Mange Online Wallet Drop-Down

Figure 2 - Account Online Wallet Options.

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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.

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.
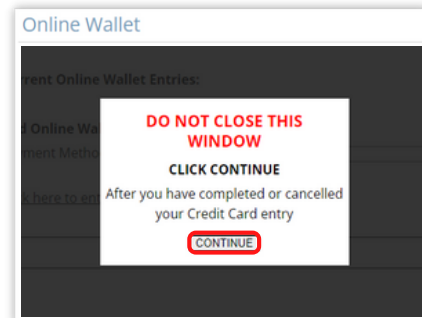

Figure 3 - Add Online Wallet Entry Drop-down

Figure 4 - Add Wallet Entry and Confirmation

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.

Figure 5 - Save Wallet Entry for Future Use Checkbox

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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
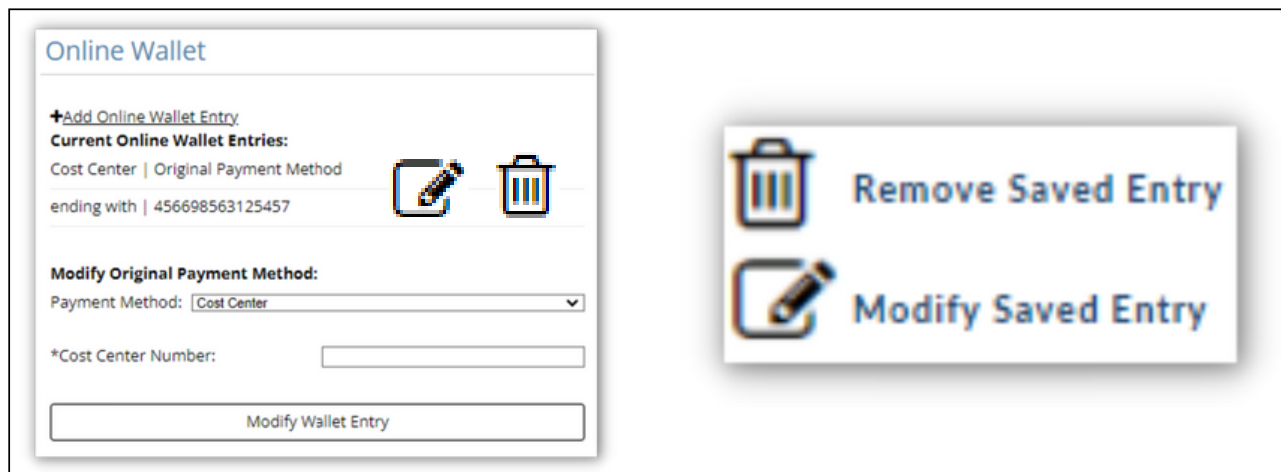
Modify icon. (Figure 6)

Figure 6 - Modify or Remove Online Wallet Entry

QUESTIONS?

Contact your food services team for support.