

How to Place a Floor Stock Order Administratively

With CaterTrax online ordering, you can place a Floor Stock order for a customer at any time, on any device.



Follow the steps below for a quick and easy way to manage your Floor Stock orders. With an administrative account, you gain access to place and modify Floor Stock orders on behalf of customers.

GET STARTED

To start, visit your CaterTrax website.

1. Click **Admin Sign In** in the bottom right corner of the homepage. (Figure 1)
2. Complete all required fields on the **Administrative Sign In** page and click Sign In.

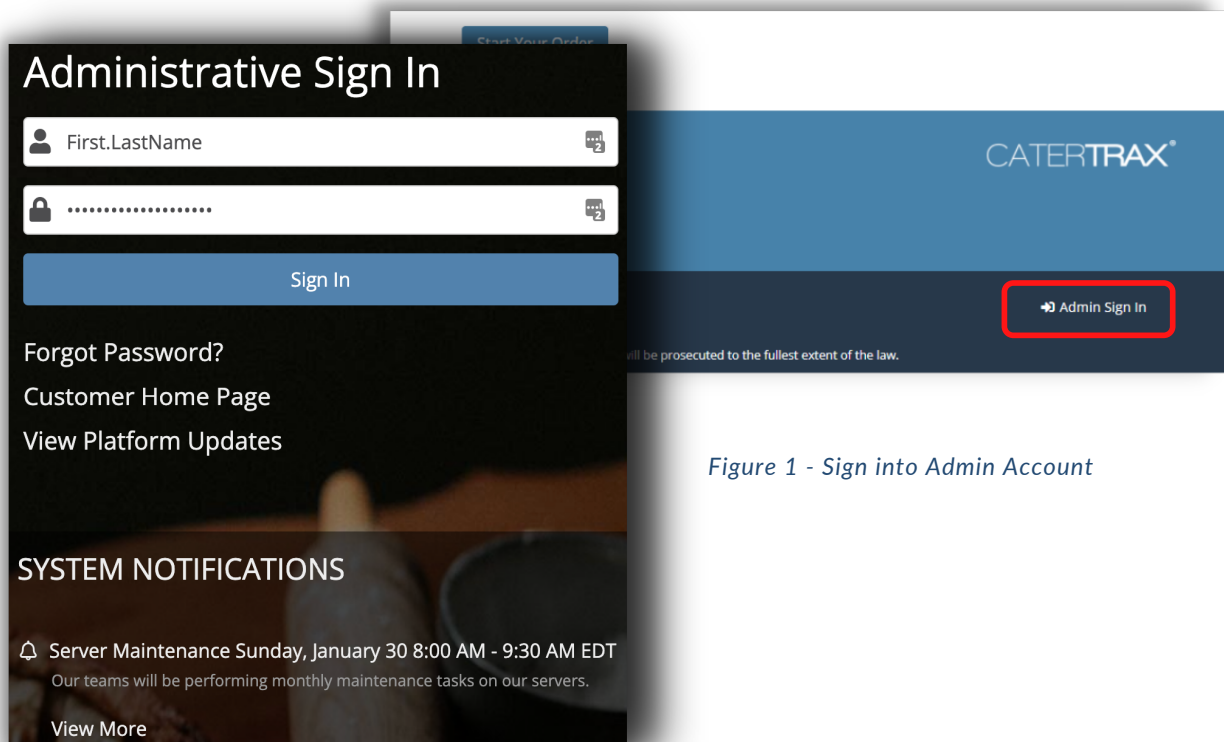


Figure 1 - Sign into Admin Account

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LOCATE CUSTOMER ACCOUNT

Make sure you are logged into your account as an administrator.

1. Click **New Order** in the top left corner of the calendar landing page. (Figure 2)
2. Select the *Floor Stock/Requisitions* **Ordering Option** and locate or create your customer's profile. (Figure 3)
3. Click **Create Order** button. (Figure 4)

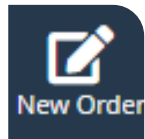


Figure 2 - Admin New Order

Ordering Option

- ✓ Select
- Full Service Catering
- To Go
- Floor Stock
- Meal Replacement
- Groceries
- Limited Catering
- Cafe Services
- Pantry / Snack Room
- Take Out

Figure 3 - Ordering Option & Search/Create Customer Accounts

Search for a Customer

Search: Search

NEW Create a New Customer

Please fill in the required fields below

*First Name:

*Last Name:

Department:

*Email:

*Phone:

Cell Phone:

Join our mailing List:

Send "Set Password" Email:

Create Customer

| Case, Justin [CID:295] ★★★★★ Orders: 5 Last: 1/31/2022 Total: \$156.00 | | | | |
|--|------|-----------|---------|--|
| Case, Justin 585-270-2879 justincase274@hotmail.com | 2215 | 1/26/2022 | \$6.00 | |
| | 2212 | 1/27/2022 | \$17.98 | |
| | 2211 | 1/20/2022 | \$26.97 | |
| | 2210 | 1/25/2022 | \$8.99 | |
| | 2207 | 1/31/2022 | \$96.06 | |

Customer Information Create Reservation **Create Order**

Figure 4 - Create Order Button

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CREATE A NEW ORDER

Make sure you are logged into your account as an administrator.

1. Choose your **Floor Stock** menu from the listed selections.
2. Browse the menu and select the item(s) you want to order; Items will be organized by units. (Figure 5)

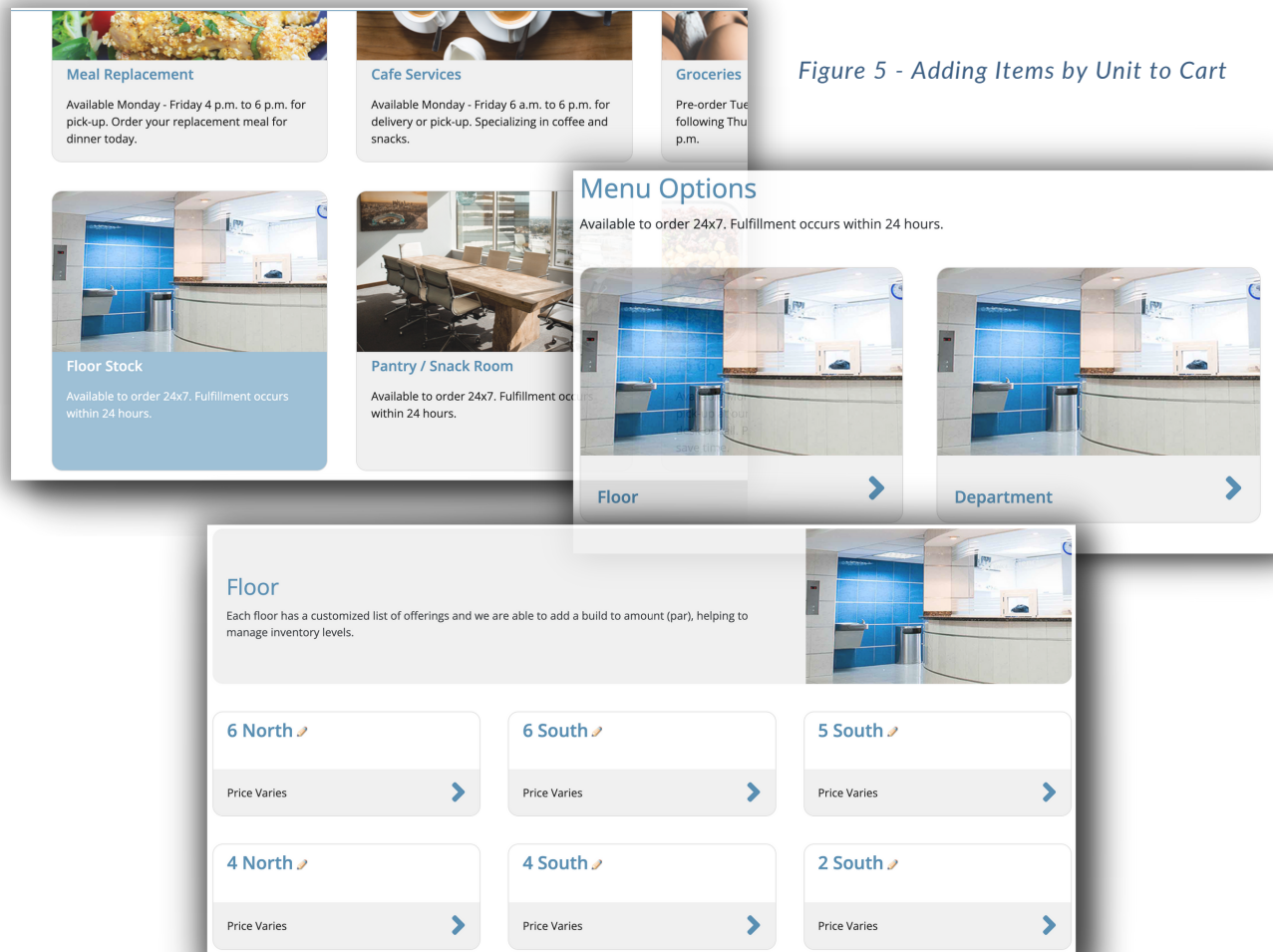


Figure 5 - Adding Items by Unit to Cart

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ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

3. For each item, fill in item quantities and click Add to Cart.
4. Once all items have been added to your cart, click on Check Out in the cart. (Figure 6)

Figure 6 - Cart Check Out

The screenshot displays the CaterTrax interface. On the left, a list of items is shown with input fields for quantities and prices. On the right, a '6 Item(s) in Cart' summary box is visible, listing the items and their prices, with a total of \$21.55. A 'Check Out' button is highlighted with a red border. Below the main interface, two buttons are shown: 'Cancel' and 'Add to Cart', with the 'Add to Cart' button also highlighted with a red border.

| Quantity | Item Description | Price |
|----------|--|--------|
| 6 | Apple Juice, 4 oz. (par 20) - each | \$0.13 |
| 25 | Cranberry Juice, 4 oz. (par 24) - each | \$0.13 |
| 10 | 1% Milk, 4 oz. (par 8) - each | \$0.18 |
| | Ginger Ale, 8 oz. (par 24) - each | \$0.25 |
| 2 | Diet Ginger Ale, 8 oz. (par 24) - each | \$0.25 |
| 12 | Apple Sauce, 4 oz. (par 8) - each | \$0.66 |
| | Gelatin, 4 oz. (par 8) - each | \$0.08 |
| | Diet Gelatin, 4 oz. (par 8) - each | \$0.08 |
| | Saltines (par 100) - per pkg | \$0.03 |
| | Coffee, Ground 1.7 oz., Royal Cup (par 24) - per pkg | \$0.67 |
| 10 | Decaf Coffee 1.25 oz., Royal Cup (par 24) - per pkg | \$0.73 |

| Quantity | Item Description | Price |
|--------------|---|----------------|
| 6 | Apple Juice, 4 oz. (par 20) - each | \$0.78 |
| 25 | Cranberry Juice, 4 oz. (par 24) - each | \$3.25 |
| 10 | 1% Milk, 4 oz. (par 8) - each | \$1.80 |
| 2 | Diet Ginger Ale, 8 oz. (par 24) - each | \$0.50 |
| 12 | Apple Sauce, 4 oz. (par 8) - each | \$7.92 |
| 10 | Decaf Coffee 1.25 oz., Royal Cup (par 24) - per pkg | \$7.30 |
| Total | | \$21.55 |

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ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

5. Review the order on **Step 1** and click **Continue**. (Figure 7)

6. Select a date and time for the order on **Step 2**, and complete the applicable Pickup or Delivery information. (Figure 8)

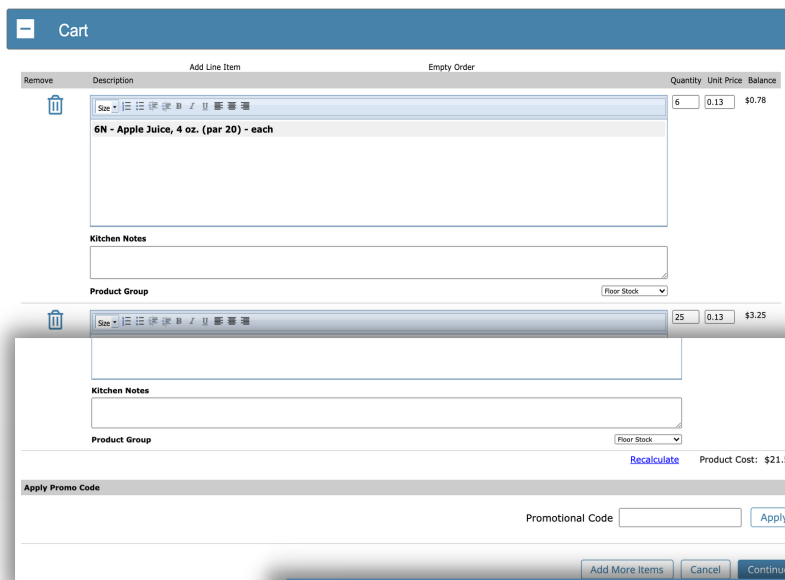


Figure 7 - Check Out Step 1

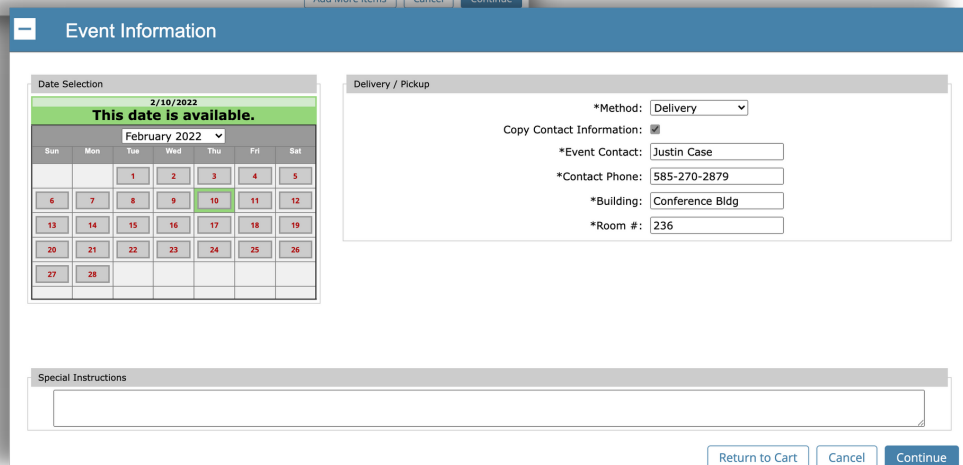


Figure 8 - Check Out Step 2

How to Place a Floor Stock Order Administratively

ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

7. Review Order Summary on Step 3 and, if correct, click Continue. (Figure 9)

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Order Summary

Customer Information

First Name: Justin
 Last Name: Case
 Email: justincase274@hotmail.com
 Phone: 585-270-2879
 Cell Phone: 585-615-0025

Delivery / Pickup Information

Ordering Option: Limited Catering
 Method: Delivery
 Event Contact: Justin Case
 Contact Phone: 585-270-2879
 Building: 200W
 Room #: 436

Event Information

Guest Count: 1
 Pick-up/ Delivery Date: Friday, 1/28/2022
 Food Delivery Time: 9:00 AM

| Description | Quantity | Unit Price | Balance |
|--|----------|------------|---------|
| 6N - Apple Juice, 4 oz. (par 20) - each | 6 | \$0.13 | \$0.78 |
| 6N - Cranberry Juice, 4 oz. (par 24) - each | 25 | \$0.13 | \$3.25 |
| 6N - 1% Milk, 4 oz. (par 8) - each | 10 | \$0.18 | \$1.80 |
| 6N - Diet Ginger Ale, 8 oz. (par 24) - each | 2 | \$0.25 | \$0.50 |
| 6N - Apple Sauce, 4 oz. (par 8) - each | 12 | \$0.66 | \$7.92 |
| 6N - Decaf Coffee 1.25 oz., Royal Cup (par 24) - per pkg | 10 | \$0.73 | \$7.30 |

6N - Apple Juice, 4 oz. (par 20) each
 6N - Cranberry Juice, 4 oz. (par 24) - each
 6N - 1% Milk, 4 oz. (par 8) - each
 6N - Diet Ginger Ale, 8 oz. (par 24) - each
 6N - Apple Sauce, 4 oz. (Par 8) - each
 6N - Decaf Coffee 1.25 oz., Royal Cup (par 25) - per pkg

Product Cost: \$21.55

| | |
|-----------------|----------------|
| Delivery Charge | 0.00 |
| Service Charge | 0.00 |
| Late Fee | 0.00 |
| Discount | 0.00 |
| Coupon Discount | 0.00 |
| Tax (0%) | 0.00 |
| Balance: | \$21.55 |

Recalculate

<< Add Another Order
Back
Cancel
Continue

Figure 9 - Check Out Step 3

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COMPLETE ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

8. Step 4 will have you Select your payment method, complete the details, and click Place Your Order. (Figure 10)

Payment Method

*Please Note: The final invoice may be re-calculated to satisfy special requests or additions to standard offer.
You MUST click the Process This Order button below to complete this order.

Enter Payment Information
Select a payment method

Any saved online wallet entries are now listed under the appropriate payment method

*Payment Method:

Do NOT Send Email to Customer

Return to Summary Cancel Place Your Order

Any saved online wallet entries are now listed under the appropriate payment method

*Payment Method:

Online Wallets:

*Cost Center Number:

Save Wallet Entry for Future Use:

Do NOT Send Email to Customer

SSL Secure
128-bit encryption

Return to Summary Cancel Place Your Order

Figure 10 - Check Out Step 4

QUESTIONS?



To contact support with any questions, submit a support ticket via the Support tab.