

How to Place a Take-Out Order Administratively

With CaterTrax online ordering, you can place a take-out order for a customer at any time, on any device. Whether you are planning for a special event, team meeting, or your next meal, we've got you covered.



Follow the steps below for a quick and easy way to manage your take-out orders. With an administrative account, you gain access to place and modify Take-Out 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.

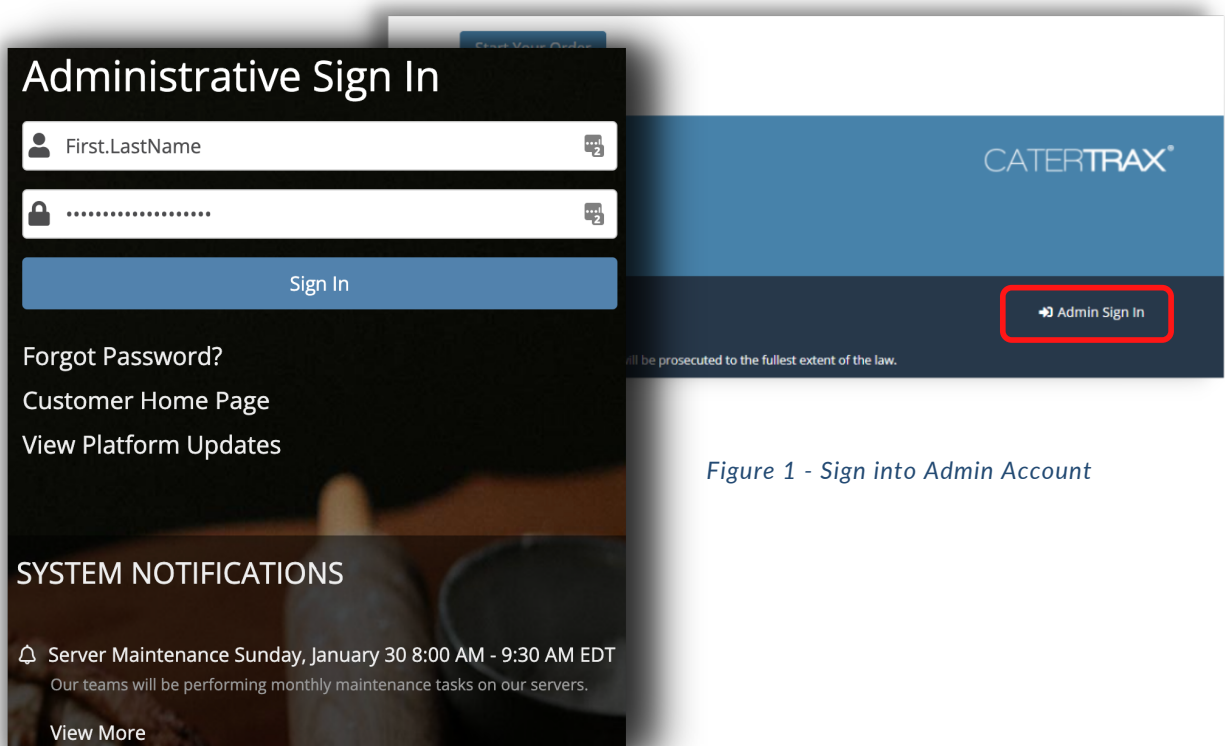


Figure 1 - Sign into Admin Account

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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 Take-Out **Ordering Option** and locate or create your customer's profile. (Figure 3)
3. Click **Create Order** button. (Figure 4)

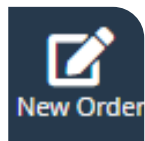


Figure 2 - Admin New Order

Ordering Option

Select

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

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

Figure 3 - Ordering Option & Search/Create Customer Accounts

Case, Justin [CID:295] ★★★★★ Orders: 5 | Last: 1/31/2022 | Total: \$156.00

| | | | |
|---------------------------|------|-----------|---------|
| Case, Justin | 2215 | 1/26/2022 | \$6.00 |
| 585-270-2879 | 2212 | 1/27/2022 | \$17.98 |
| justincase274@hotmail.com | 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 Take-Out menu from the listed selections. (Figure 5)
2. Browse the menu and select the item(s) you want to order.
3. For each item, fill in item details 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 5 - Take-Out Menu

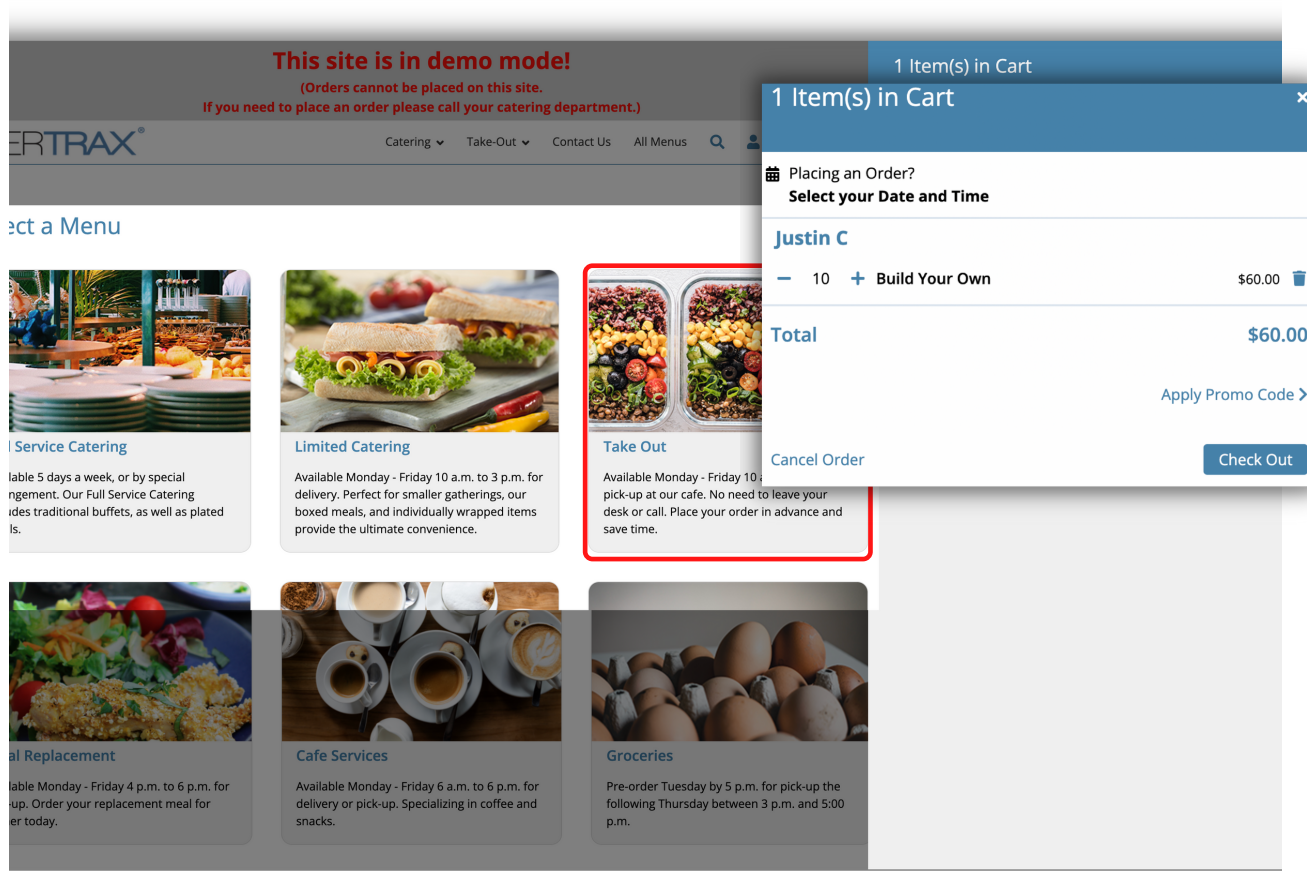


Figure 6 - Check Out

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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

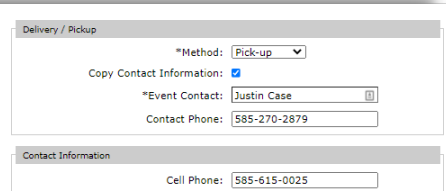
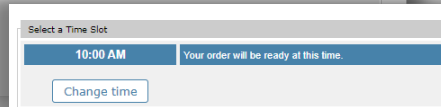
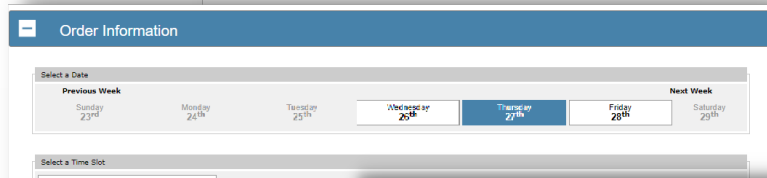
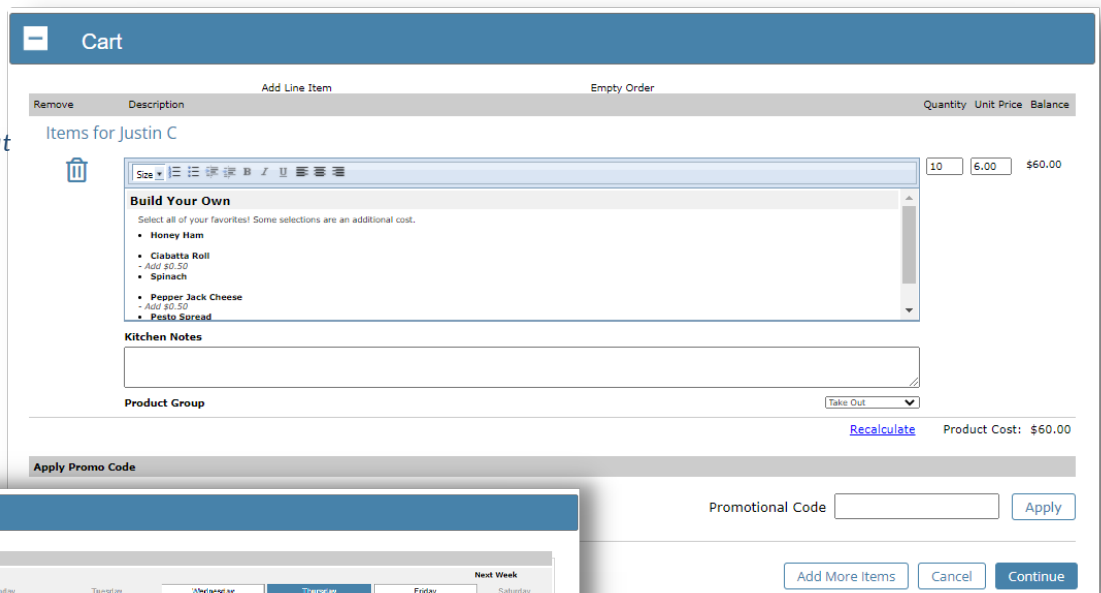


Figure 8 - Check Out Step 2

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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. (Optional) Add a name to your order using the Order Name field.(Figure 9)

☰
Order Summary

Order Name: Q1 Meeting Lunch Order

| Customer Information | Delivery / Pickup Information | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------|
| First Name: Justin Last Name: Case Email: justincase274@hotmail.com Phone: 585-270-2879 Cell Phone: 585-615-0025 | Ordering Option: Take Out Method: Pick-up Event Contact: Justin Case Contact Phone: 585-270-2879 | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: left;">Order Information</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"> Pick-up/ Delivery Date: Thursday, 1/27/2022 Earliest Pick-Up Time: 10:00 AM </td> </tr> </tbody> </table> | | Order Information | Pick-up/ Delivery Date: Thursday, 1/27/2022 Earliest Pick-Up Time: 10:00 AM |
| Order Information | | | |
| Pick-up/ Delivery Date: Thursday, 1/27/2022 Earliest Pick-Up Time: 10:00 AM | | | |

| Description | Quantity | Unit Price | Balance |
|--------------------------------------------------------------------------------------------------------------|----------|------------|---------|
| Items for Justin C | | | |
| Build Your Own | 10 | \$6.00 | \$60.00 |
| Select all of your favorites! Some selections are an additional cost. | | | |
| Honey Ham Ciabatta Roll - Add \$0.50 Spinach Pepper Jack Cheese - Add \$0.50 Pesto Spread | | | |

| | |
|--|--------------------------------------------|
| | Product Cost: \$60.00 |
| | Delivery Charge 0.00 |
| | Service Charge 0.00 |
| | Late Fee 0.00 |
| | Discount 0.00 |
| | Coupon Discount 0.00 |
| | Tax (0%) 0.00 |
| | Balance: \$60.00 |
| | <input type="button" value="Recalculate"/> |

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.