MANAGING YOUR PAYMENT GATEWAY

This guide will aid you in managing your payment gateway within the CaterTrax platform. The online wallet allows customers to store details of their cards and other payment methods for ease of use for future orders. Additionally, you will have the ability to apply payments on behalf of your customers should they request that you do so.

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.

Administrative Sign In	
E First.LastName	CATER TRAX *
≙	
Sign In	+D Admin Sign In
Forgot Password?	I be prosecuted to the fullest extent of the law.
Customer Home Page	
View Platform Updates	
SYSTEM NOTIFICATIONS	
 Server Maintenance Sunday, January 30 8:00 AM - 9:30 AM EDT Our teams will be performing monthly maintenance tasks on our servers. View More 	

Figure 1 - Sign into Admin Account

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Payment methods saved by customers will be stored in their online wallets located in their customer account profile that you will need to locate in order to manage.

LOCATING A CUSTOMER ACCOUNT

Ensure you are signed in as a site administrator

- 1. Start by clicking on the Customer's icon at the top navigation bar. (Figure 2)
- 2. Next you will search for the customer.
- 3. Once you have found your customer click on the Customer Information button. (Figure

3)



ast Name 🐱	A	B	C	D	E	F	G	H	1	J	K	L	M
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hone ell Phone mail		Disp	olay G	uest C	ustom	ers							
epartment												1	2 3
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lastname	, firstna	ame [C]	[D:125]	್ರೇಶಿಕ	stati							×	
lastname, fir 5551234321 firstnamelast	stname name@ema	il.com											

Figure 3 - Search Customer Database

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ADDING/MODIFYING ONLINE WALLETS

1. Click on the Account, then click Add/Remove next to the Online Wallet section.

(Figure 4)

2. To **add** a method, select the appropriate payment information from the drop-down list.

(Figure 5)

- 3. To modify a method, click the pencil icon. (Figure 6)
- 4. To remove a method, click the trashcan icon. (Figure 6)

Customers 125 firstname last	name			
Customer firstr Customer ID #125 5551234321 firstnamelastname@email.	name lastname			
				Reset Password Create New Order
Orders Master Invoices	Account Comments			
Orders Master Invoices Profile	Account Comments	Update	Online Wallet	Add / Remove
Orders Master Invoices Profile First Name:	Account Comments	Update	Online Wallet ending with ending with 0932	Add / Remove
Orders Master Invoices Profile First Name: Last Name:	Account Comments firstname lastname	Update	Online Wallet ending with ending with 0932	Add / Remove
Profile First Name: Last Name: Department:	Account Comments firstname lastname	Update	Online Wallet ending with ending with 0932 Associated Customers	Add / Remove Add / Remove
Profile First Name: Last Name: Department: Email:	Account Comments firstname lastname firstnamelastname@emai	Update	Online Wallet ending with ending with 0932 Associated Customers No Associated Customers	Add / Remove Add / Remove
Profile First Name: Last Name: Department: Email: Phone:	Account Comments firstname lastname firstnamelastname@emai 5551234321	Update	Online Wallet ending with ending with 0932 Associated Customers No Associated Customers	Add / Remove Add / Remove
Orders Master Invoices Profile First Name: Last Name: Department: Email: Phone: Cell Phone:	Account Comments firstname lastname firstnamelastname@emal 5551234321	Update	Online Wallet ending with ending with 0932 Associated Customers No Associated Customers	Add / Remove Add / Remove

Figure 4 - Customer Account Add/Remove Online Wallet

🚽 Online Wallet - Google Chrome	-	- 0	×
Current Online Wallet Entries: ending with ending with 0932	ľ	۵	
Add Online Wallet Entry: Payment Method: Select			Ĵ
Figure 5 - Add Online Wa Pop-up Window	llet Entry		

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ADDING/MODIFYING ONLINE WALLETS CONTINUED

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. (Figure 7)

🖣 Online Wallet - Google Chrome — 🗌	×
Current Online Wallet Entries:	
ending with ending with 0932	Note: If the credit card payment
Add Online Wallet Entry:	information form does not automatically open in a new window, select the link to
Payment Method: Select	Click here to enter a new credit card.
	Online Wallet
	rent Online Wallet Entries:
Add Online Wallet Entry:	d Online Wa WINDOW
Payment Method: Coult Coult	CLICK CONTINUE
Payment Method. Credit Card	your Credit Card entry
Click here to enter a new credit card	CONTINUE
Add Wallet Entry	Enter Your Credit Card
	Cardholder Name
128-bit encryption	Credit Card Number
	😂 VISA 🛄 🚾
	Expiry Date (MMYY)
	Address
Add Online Wallet Entry:	City
Payment Method: Cost Center 🗸	
*Cost Center:	State/Province Alabama
Add Wallet Entry	ZIP/Postal Code
	Country United States ~ Submit

Figure 7 - Required Payment Information Forms/Fields

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ADDING/MODIFYING ONLINE WALLETS CONTINUED

5. Once the online wallet entry has been added, modified, or removed you will receive a

message advising the action was successful. (Figure 8)

Online Wallet - Google Chrome				×		
The Card wa	s added suc	cessfu	ully.	2%28		
Current Online Wallet E	ntries:		-	- 1		
ending with ending with	0932	Ľ	Ē	-1		
Add Online Wallet Entry	:					
Payment Method: Select				~		
	Gonline Wallet - Google	Chrome			-	
	The Online Wa	allet Ent	ry was	success	fully rem	noved.
	Current Online W	allet Entrie	es:			
	ending with ending	with 093	2	٥	í d	J
		F				
	Add Online Wallet	Entry:				
Online Wallet - Google Chrome		- 0	×			
Wallet Modification Successful						
urrent Online Wallet Entries:			- 1			
nding with 0931	ľ	匬	- 1			
			- 8			
Add Online Wallet Entry:						

Figure 8 - Successful Online Wallet Entry Message Examples

MANAGING YOUR PAYMENT GATEWAY

To begin applying payments or refunds we must first locate the specific order.

LOCATING ORDERS

- 1. Locating a specific order can be done by the following search methods.
 - a. Finding and entering the Order ID in the search Order ID field. (Figure 9)
 - b. Clicking on the order displayed on the Calendar view. (Figure 10)
 - c. Clicking the Order ID within the Customer's Orders section. (Figure 11)



Figure 11 - Customer Account Orders

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ADD A PAYMENT TO AN ORDER

1. To add a payment, click Add Payment located above the order, then add/verify the

applicable payment details to complete the form. (Figure 12)

2. Once the payment amount has been entered, click the Add Payment button within

the pop-up window to complete. (Figure 13)

a. Note, Balance Due will display the order total amount, and the Payment in full is

checked by default.

3. Verify that the confirmation is displayed. (Figure 14)



Figure 12 - Add Payment



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



Figure 13 - Applying Order Payment

A payment of \$79.00 has been added.

Figure 14 - Payment Confirmation Message

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ADD A REFUND TO AN ORDER

- 1. To add a refund, click Add Refund located above the order. (Figure 15)
- 2. Select the payment method to refund, then enter the refund amount, and click the

Add Refund button within the pop-up window to complete. (Figure 16)

3. Verify that the confirmation is displayed. (Figure 17)



Figure 15 - Add Refund

Apply Refund	
P	Order#
*Refund Method:	Cost Center 🗸
*Cost Center	
Number:	
* Refund Amount	\$
	Add Refund

Figure 16 - Applying Order Refund

Note: Ensure the Refund Method is the same one that was used to make the initial payment.

A refund of \$-79.00 has been added.

Figure 17 - Refund Confirmation Message

MANAGING YOUR PAYMENT GATEWAY

AUTHORIZATION CODES

An **Authorization Code** will display on the order to verify that the payment has gone

through the credit card payment gateway system successfully. (Figure 18)

Payment Information	9	
Payment Type :	TEST CARD	
Auth Code:	APPROVED AUTH CODE:05486G APPROVED AUTH CODE:	

Figure 18 - Authorization Code Example

QUESTIONS?



Contact Support by filling out a support ticket.