# 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.
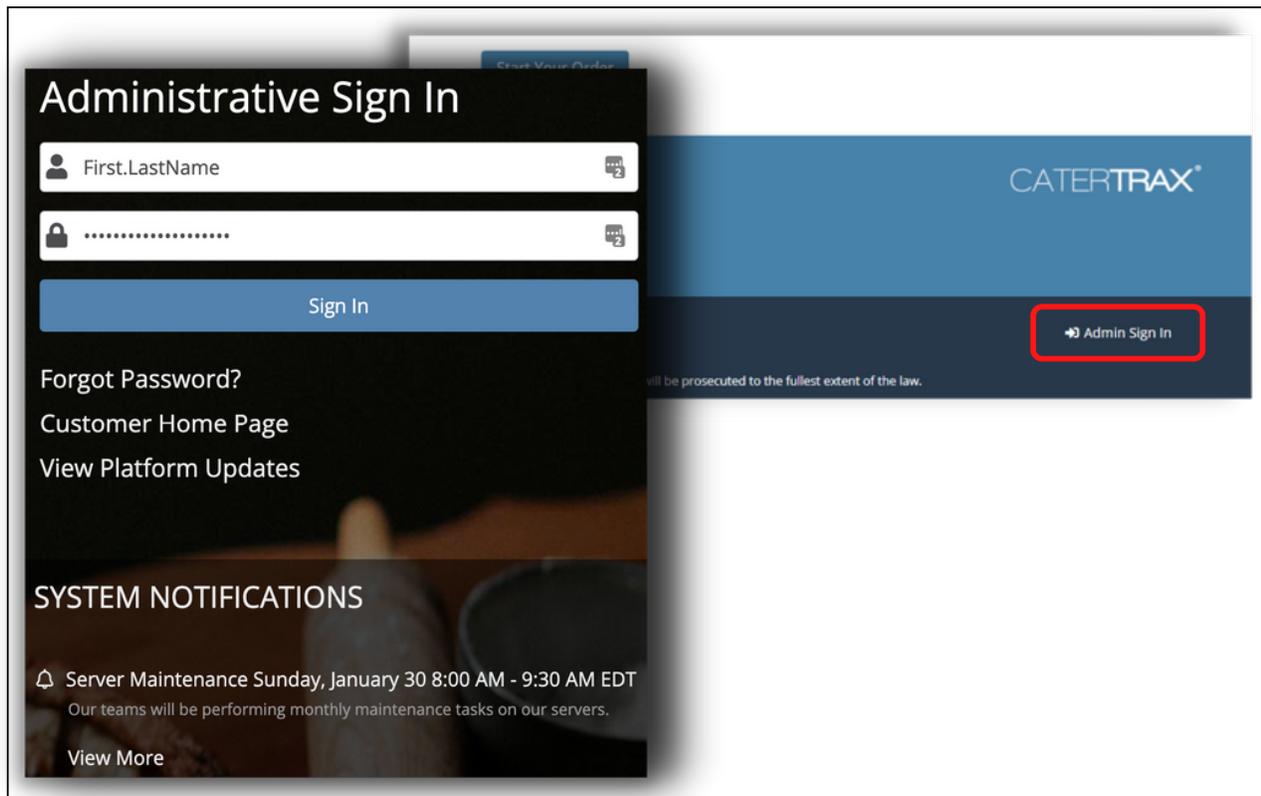


*Figure 1 - Sign into Admin Account*

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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)
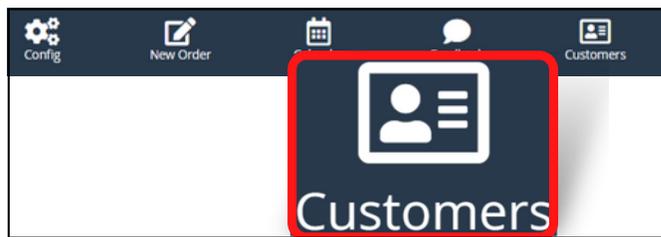


*Figure 2 - Customers Icon*
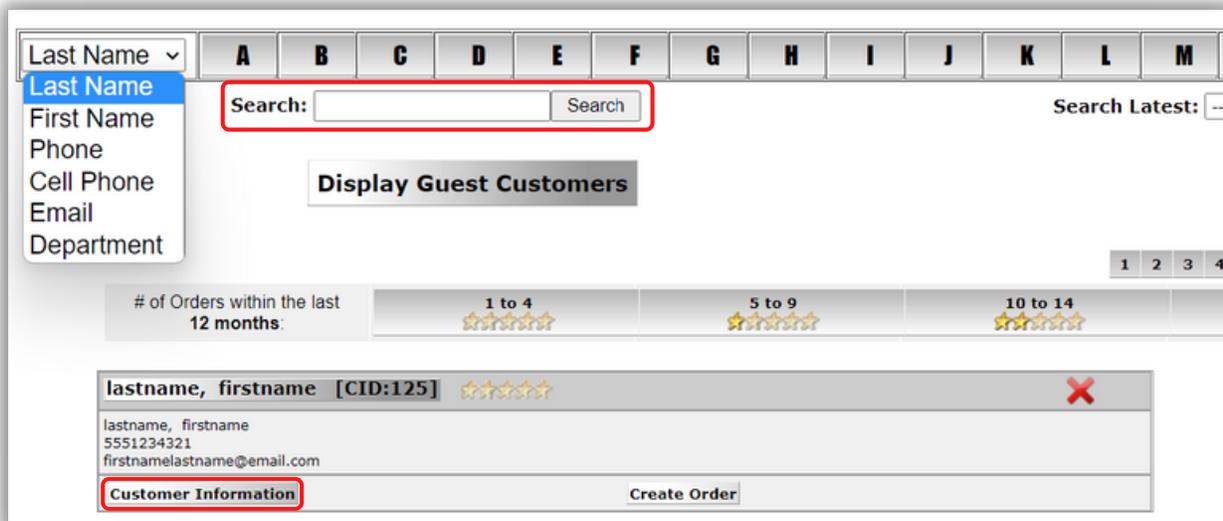


*Figure 3 - Search Customer Database*

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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)
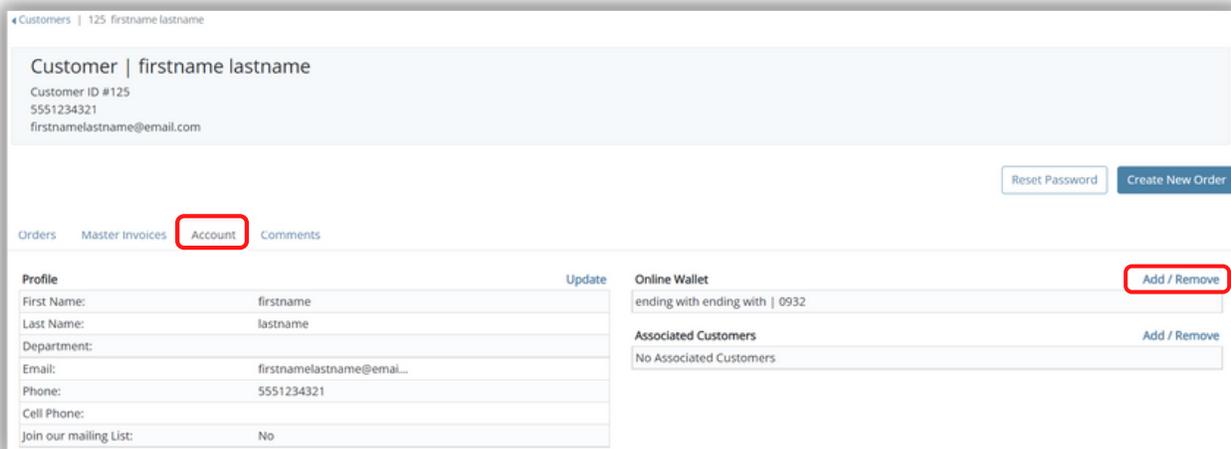


*Figure 4 - Customer Account Add/Remove Online Wallet*
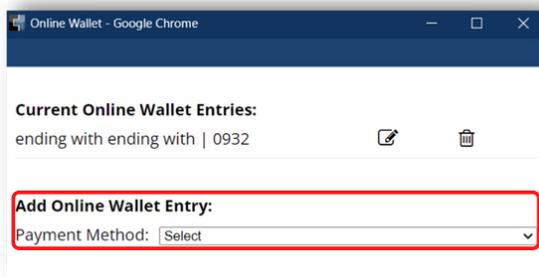


*Figure 5 - Add Online Wallet Entry Pop-up Window*
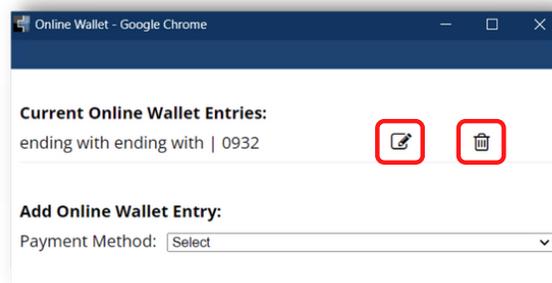


*Figure 6 - Modify/Remove Wallet Entry Pop-up Window*

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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)



**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 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)
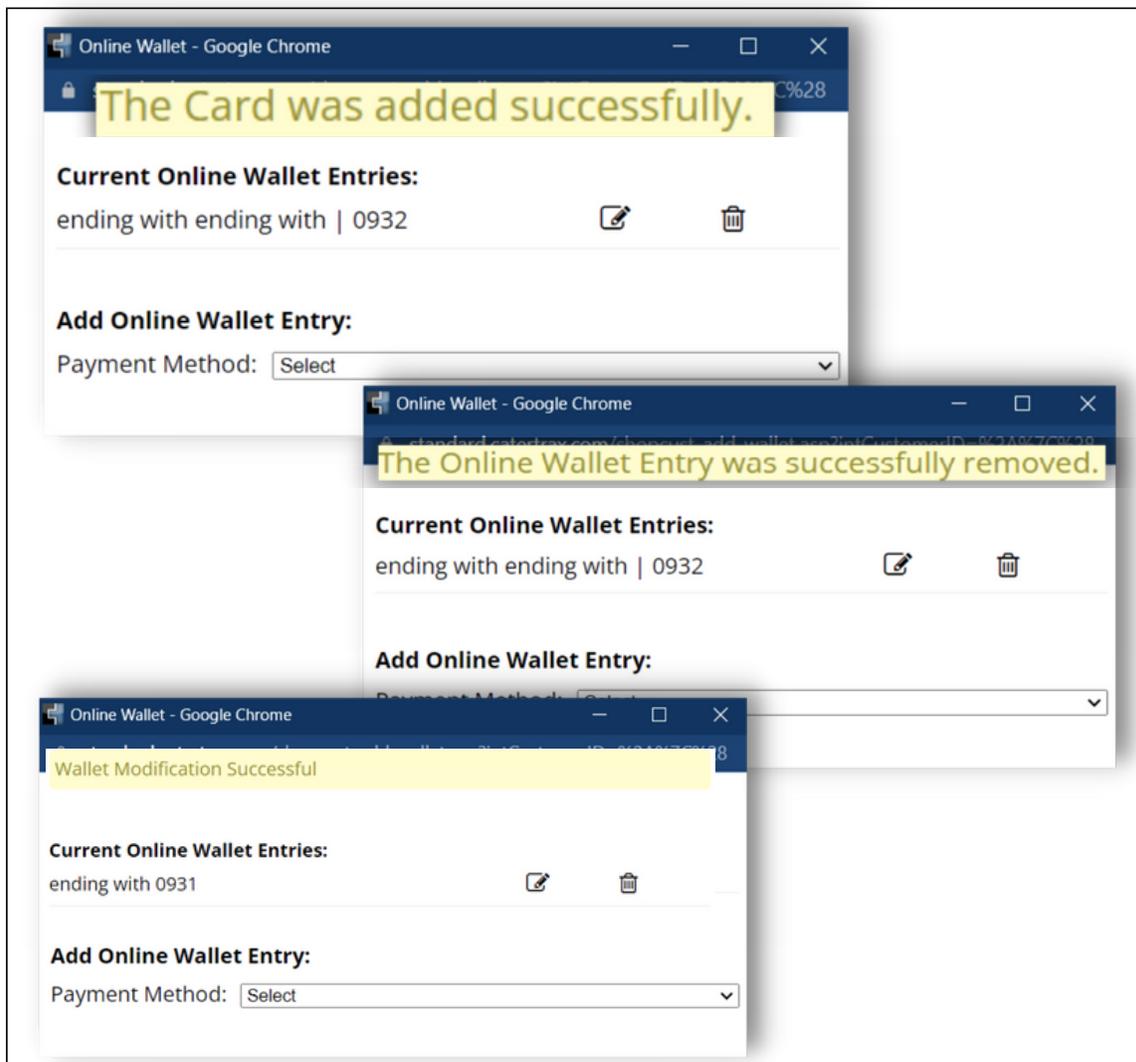


*Figure 8 - Successful Online Wallet Entry Message Examples*

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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 9 - Search Order ID Field*
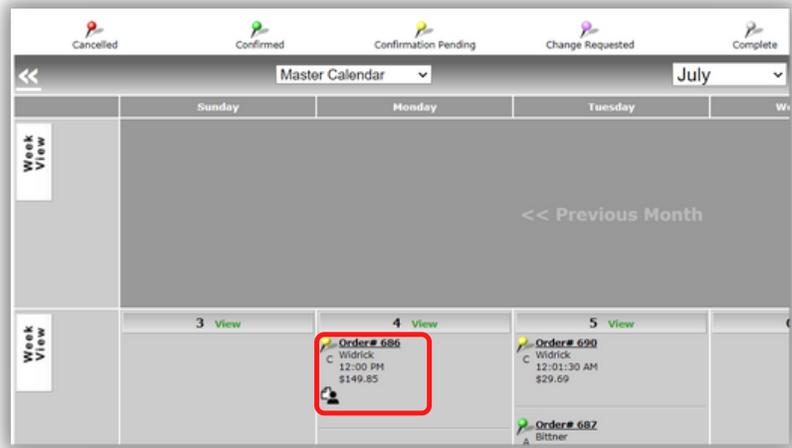


*Figure 10 - Calendar View Order Examples*
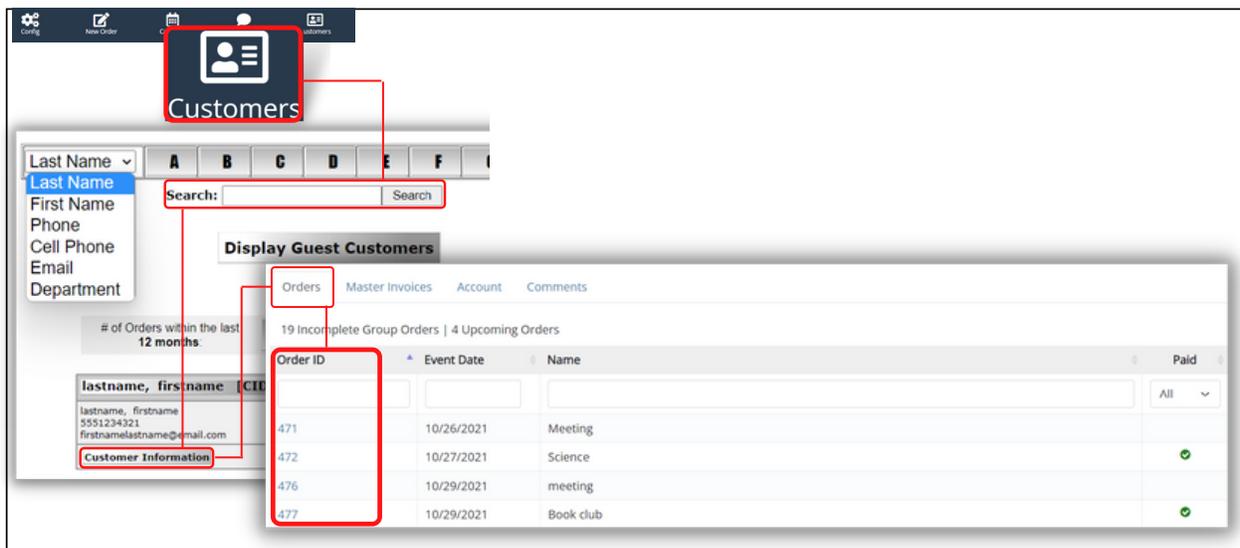


*Figure 11 - Customer Account Orders*

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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)
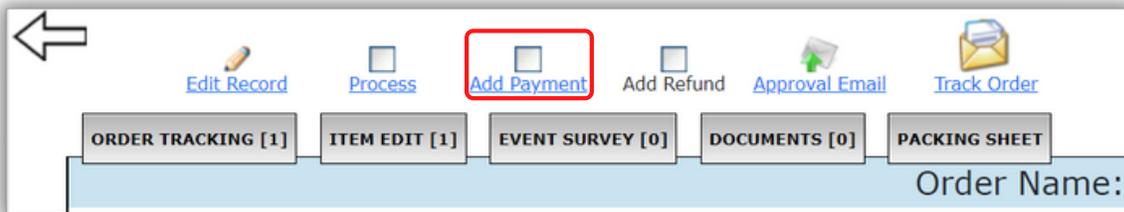


*Figure 12 - Add Payment*
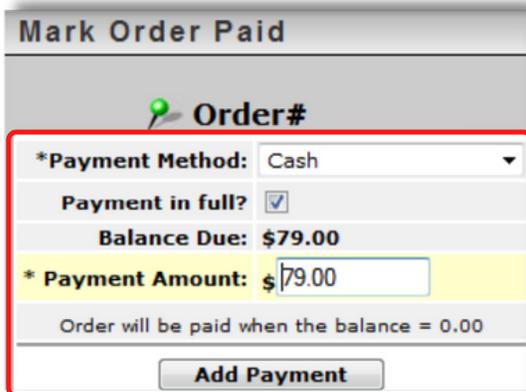


*Figure 13 - Applying Order Payment*

**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 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)
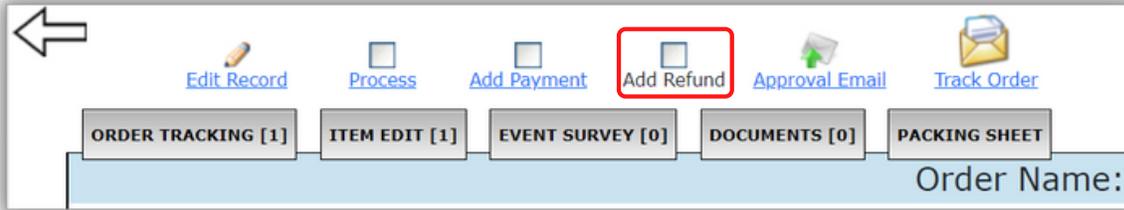


*Figure 15 - Add Refund*



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

*Figure 16 - Applying Order Refund*



A refund of $-79.00 has been added.

*Figure 17 - Refund Confirmation Message*

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## 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)



*Figure 18 - Authorization Code Example*

## QUESTIONS?

Contact Support by filling out a support ticket.