

How to Make Changes to an Order

When you need to make changes to a customer's order, it's easy to:

- Update customer, delivery/pickup, payment, or event information
- Add/change/remove charges, fees, discounts, etc.
- Add, change, or remove items within an order

To make life easier for you and your customer, the system displays a tracking message on the order each time a change is made!

Update Information on an Order

Any of the customer information, delivery/pickup information, payment information, or event information fields can be modified on a specific order. **This affects only** the selected order.


1. From the CaterTrax administrative view, go to the order for which you are changing information.
2. Click the **Edit Pencil**  next to the heading for the section in which changes are needed (i.e., Customer Information, Delivery/Pickup Information, Payment Information, and Event Information).
3. Edit the information, as applicable. To change the customer account that is associated with the order, you must first locate the customer identification number on the customer account to which the order should be associated (refer to Figure 1). Update the order with this account information to ensure the order is reflected on this customer's account.

Figure 1



Smart, Jill [CID:26]

4. Click **Update**.
5. Repeat Steps 2-4 for any sections of information that require changes.

Add/Change/Remove Charges, Fees, or Discounts on an Order

Any of the fields in the **Order Totals** section of the invoice can be modified to add, change, or remove the associated charges, fees, discounts, and even the tax exempt status.



1. From the CaterTrax administrative view, go to the order for which you are changing information.
2. Click the **Edit Pencil**  in the **Order Totals** section of the invoice.
3. Edit the information, as applicable. Refer to Figure 2.
4. Click **Update & Close**.

Figure 2

Update Order Summary - Order #86

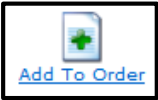
 = Overridden Field

Sub Total	\$150.00
Delivery Charge	\$ 0.00
Service Charge	\$ 0.00
Late Fee	\$ 0.00
Gratuity	\$ 0.00
Discount	\$ 0.00
Coupon Discount	\$ 0.00
Tax (8%)	\$ 12.00
Fun Tax (1%)	\$ 1.50
Tax Exempt	<input type="checkbox"/>
Order Total	\$163.50
Balance Due	\$163.50


Update & Close

Reset Overrides & Close

Add a Product to an Order From the Menu

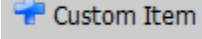
1. From the CaterTrax administrative view, go to the order to which you are adding a product.
2. Click .
3. Go to the menu map in the grey left navigation pane.

To add an item which is on the menu:

- a. Click the plus symbol () to expand the menu and locate the item to be added.
- b. Click the item name.
- c. Make applicable selection(s) as applicable.
- d. Click **ORDER**.

- e. Review the selection and make any applicable edits to the description, **Product Group**, **Quantity**, and/or **Unit Price**.

To add an item which is not on the menu:

- a. Scroll to the bottom of the menu map and click .
- b. Enter an item description, **Quantity**, and **Unit Price**.
- c. Use the dropdown to select the applicable **Product Group**.

4. Click **Continue**.

5. Repeat Steps 3-4 to add items as needed.

Add an Existing Sub Product to an Order

If your site is enabled with sub products, you may add to an order a sub product which exists on your current menu.

1. From the CaterTrax administrative view, go to the order to which you are adding an existing menu sub product.

2. Click the **ITEM EDIT** tab.

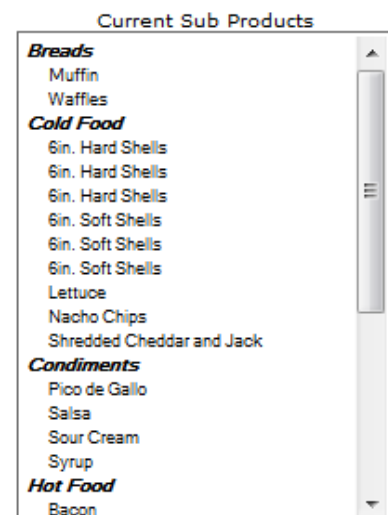
3. Click **+ Add Existing**



4. From the **Current Sub Products** list on the left, click the name of the sub product to be added to the order.

5. Click **Add Sub Product to Order**.

6. Repeat Steps 3-5 to add other existing sub products, as needed.



Add a New Sub Products to an Order

If your site is enabled with sub products, you may add to an order a sub product which does not exist on your current menu without adding that sub product to your menu.

1. From the CaterTrax administrative view, go to the order to which you are adding a new sub product.
2. Click the **ITEM EDIT** tab.
3. Click **+ Add New**

A screenshot of a menu bar with the text 'Sub Products' followed by two links: '+ Add New' and '+ Add Existing'.
4. Complete each field of the sub product creation page. Refer to Figure 1 instructions below, or for even more detail, refer to **About Sub Products, CaterTrax Administrator Guide** and the **Sub Products Worksheet**.

Figure 3

Sub-Item Name	<input type="text"/>
Sub Product Category	<input type="text" value="▼"/>
Multiplier	<input type="text"/>
Selling Unit	<input type="text"/>
Quantity	<input type="text"/>
Static	<input type="checkbox"/> if checked this item will not calculate based on quantity ordered it will use the static number in the multiplier field
Calc on Guest Count	<input type="checkbox"/> if checked this item will calculate based on the order guest count rather than the quantity order for the item
Add Sub Product	<input checked="" type="checkbox"/> Do you want to add this sub-product to the available list for future use?
Label Created	<input checked="" type="checkbox"/> if checked this item will generate a label
Units per Pack This is the threshold at which a new label will print. This is determined by (multiplier * quantity ordered) / units per pack)	<input type="text" value="1"/>
Pack Description This is how the items will be packaged. Typically, this will be by pan, half-pan, etc.	<input type="text"/>
Static Number of Labels This is the number of labels that will print regardless of the quantity ordered.	<input type="text" value="0"/>
<input type="button" value="Add to Order"/> <input type="button" value="Close"/>	

- Sub-Item Name:** Enter a name for the sub product.
- Sub Product Category:** Use the dropdown to select the category to which this sub product belongs (e.g., cold food, hot food, equipment, etc.).
- Multiplier:** Enter the value which represents an individual serving size.
- Product Selling Unit:** Enter the units of an individual serving (e.g., oz., slice, patty).

- e. **Quantity:** Enter the quantity of this item being ordered.
- f. **Static:** Check the box if the value entered as the **Multiplier** is the amount to prepare regardless of the quantity ordered.
- g. **Calc on Guest Count:** Check the box if this item will calculate based on an order's guest count collected in Step 2 of the checkout process rather than the quantity order for the item.
- h. ***If label functionality is enabled on your site:***
 - a. Check the **Label Created** box to have a label generated for this sub product.
 - b. **Units per Pack:** Calculate [individual serving size x number of servings packaged together] to enter the units per pack. This number is used to determine how many labels will be printed for the order.
 - c. **Pack Description:** If more than one serving is packaged together, enter the description for a package (e.g., tray, pan, half pan, etc.).
- i. Click **Add to Order**, and then click **Close**.

5. Click **Continue>>**.


6. Repeat Steps 3-6 to add more products, as needed.

Edit Items on the Order

If you need to edit items which are already part of an order (i.e., descriptions, quantities, etc.), your changes will be reflected on the selected order only.

1. From the CaterTrax administrative view, go to the order for which you are editing items.
2. Click the **ITEM EDIT** tab.
3. Enter applicable changes to any fields.
4. Click **Update Item**.

To Remove Items from an Order

1. From the CaterTrax administrative view, go to the order for which you are changing information.
2. Click the **ITEM EDIT** tab.
3. Click the trash can icon  next to the item you would like to remove from the order.
4. Click **OK**.

***Congratulations,** you have successfully made changes to an order!*