



# *CaterTrax Tutorial*

## *CaterTrax Overview*

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## How to: Create an Account

- On the Home page, locate the Customer Login Box
- Click on the link, next to “Need an Account?”

### CaterTrax Catering Services

[Home](#) [My Account](#) [Contact Us](#)

 Insert Logo Here

#### Customer Login

Last Name:

Password:

Login

[Need an Account? Click Here](#)  
[Need your password? Click Here](#)

Cafe Menus

Meal Plans

Specials & Promotions

Catering

Nutrition

CaterTrax Catering Services

150 Lucius Gordon Dr

W Henrietta, NY 14586

Ph: (800) 975 TRAX

Fax: (585) 298-9574

### Welcome to your online catering management system.

Whether planning a simple breakfast or an upscale executive luncheon, you will find all of our most popular menu selections on line. We can also custom design a menu for any special occasion. We pride ourselves on our ability to meet any need with style and creativity, assuring the success of your event.

This system has been created to make ordering your food and beverage requirements as easy as possible. We want to ensure that we are providing you with the very best options for you to select from, so please let us know if there is something you do not see in our order guide. We will be happy to assist you at any time with placing your food and beverage orders. Simply call the catering sales office and an event planner will walk you through the on-line process.

We want to make every event, a special event!

## How to: Create an Account

- You will need to enter the requested information on the Account Creation Form
- When you are finished, click “Continue”
- On future visits, you will log into your account from the home page using your **last name** and **password**.

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[Home](#) | [My Account](#) | [Contact Us](#)

Insert Logo Here

#### Customer Login

Last Name:   
 Password:    
 Need an Account? [Click Here](#)  
 Need your password? [Click Here](#)

#### Catering Availability

Mouse-over dates for details

< May 2010 >						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

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 Fax: (585) 298-9574

Creating an account is free and easy. You will enjoy many benefits including a quick check out and exclusive offers. Please fill in the following fields. Please note that fields preceded by \* are required.

Sincerely,

The Management Team

Our Promise: We will not sell or rent your email address or any personally identifiable information to anyone.

[New Customers](#) | [Previous Customers](#)

#### \*Required fields

\*First Name:   
 \*Last Name:   
 Department:   
 \*Email:   
 \*Phone:

Please enter password twice  
 (Min 6 characters)

\*Password:   
 \*Re-enter Password:

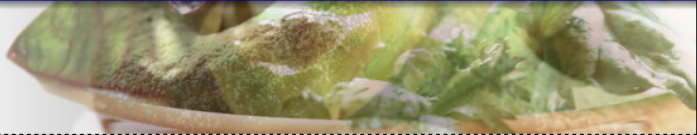
Join our mailing List: ☐

Tax Exempt: ☐

## How to: Place an Order

- After creating or logging into your account, you will be brought to your “My Account” page
- To begin the ordering process, click on “Create New Order”

CaterTrax Catering Services
Home
My Account
Contact Us

Insert Logo Here


**Account Information**  
TEST TEST  
Log Off
My Acct

**Catering Availability**  
Mouse-over dates for details  
May 2010  

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

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Welcome test!
Log Off

Corporate Memo
Order History

**Catering**  
+ Create New Order  
Manage Orders  
View My Catering

Update
**Customer Information**  
First Name: test  
Last Name: test  
Department:  
Email: support@catertrax.com  
Phone:  
Join our mailing List: False  
Tax Exempt: False

**Customer Comments** - Add Comment  
Use this comment box to add notes and preference about your account.

## *How to: Place an Order*

- You will immediately be brought to the online menu.
- To start your order, select a category. For example, “Breakfast”

The screenshot displays the CaterTrax Catering Services website. At the top, a dark blue header contains the site title and navigation links: Home, My Account, and Contact Us. Below the header is a large image of a salmon fillet with a lemon wedge and green salad. A placeholder text 'Insert Logo Here' is visible on the left side of the main content area. A horizontal navigation bar includes links for Empty Order, Check Out, My Account, Search, Policies, and Tutorial. On the left, an 'Account Information' box contains a 'TEST TEST' label and 'Log Off' and 'My Acct' buttons. Below this is a contact information box for CaterTrax Catering Services, including the address, phone, and fax numbers. The CaterTrax logo is centered at the bottom of the page. On the right side, a vertical menu lists various catering categories: Breakfast, Beverages, Sandwich Collections, Buffets, Plated Meals, Receptions, Breaks, and Additional Services, each accompanied by a small food image.

**CaterTrax Catering Services**

Home | My Account | Contact Us

Insert Logo Here

Empty Order | Check Out | My Account | Search | Policies | Tutorial

**Account Information**  
TEST TEST  
Log Off | My Acct

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Fax: (585) 298-9574

CATERTRAX

**Breakfast**

**Beverages**

**Sandwich Collections**

**Buffets**

**Plated Meals**

**Receptions**

**Breaks**

**Additional Services**

## *How to: Place an Order*

- After selecting a category, all products in that category will be displayed.
- When you have found the product you want to order, click on “View Details”

### CaterTrax Catering Services

[Home](#) [My Account](#) [Contact Us](#)

Insert Logo Here

#### Account Information

TEST TEST

[Log Off](#)[My Acct](#)

#### Breakfast

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[Empty Order](#)[Check Out](#)[My Account](#)[Search](#)[Policies](#)[Tutorial](#)

### Breakfast

#### Breakfast Buffet

Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.

\$9.99 Per Person

[View Details](#)




## How to: Place an Order

- Now, you will need to enter the number of guests.
- In addition, you will need to select any feature options that apply.
- If you have any special instructions, enter them in the “Special Instructions” box.
- When you are finished, click on “Order”

### CaterTrax Catering Services

[Home](#)
[My Account](#)
[Contact Us](#)



[Empty Order](#)
[Check Out](#)
[My Account](#)
[Search](#)
[Policies](#)
[Tutorial](#)


#### Account Information

TEST TEST

[Log Off](#)
[My Acct](#)

#### Breakfast

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#### Breakfast Buffet

Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.

##### Special Instructions

**\$9.99 Per Person**

Number of Guests   
(minimum quantity is 10)

**ORDER**



## Step 1: Confirm Selection

- After placing items in your cart, you will be brought to Step 1 of the check-out process. If you are finished ordering, make sure your order is correct and click on “Continue>>”
- If you need to add more items to your cart, either click on “<<Add More” or simply click on one of the category buttons.

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Home | My Account | Contact Us

Insert Logo Here

Empty Order | Check Out | My Account | Search | Policies | Tutorial

**Breakfast**

**CaterTrax Catering Services**  
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**Step 1**  
Confirm Selection

**Step 2**  
Event Information

**Step 3**  
Review Selection

**Step 4**  
Checkout

**Your Selection**


Remove	Description	Quantity	Unit Price	Balance
X	<b>Breakfast Buffet</b> Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.	10	\$9.99	\$99.90
Product Cost				\$99.90

<< Add More | Continue >>

## Step 2: Event Information

- In Step 2 of the check-out process, you will need to first select the date for your event.
- Any dates highlighted in **red** indicate the date is unavailable and you are unable to complete your order online for those dates.
- Any dates highlighted in **yellow** indicate you will need to contact the Catering Department to confirm your order; but you will be able to place your order online.

CaterTrax Catering Services
Home My Account Contact Us

Insert Logo Here


Current Selections
[10] Breakfast Buffet
\$9.99 X 10 = \$99.90
Subtotal: \$99.90

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Fax: (585) 298-9574

CATERTRAX

Empty Order Check Out My Account Search Policies Tutorial

Step 1 Confirm Selection
Step 2 Event Information
Step 3 Review Selection
Step 4 Checkout

Date Selection

May 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	

## Step 2: Event Information

- Once an available date has been selected, you will need to enter your delivery/pick-up and event information.
- When you have finished, click on “Continue>>” at the bottom of the screen.

### CaterTrax Catering Services

[Home](#)
[My Account](#)
[Contact Us](#)

Insert Logo Here

**Current Selections**

[10] **Breakfast Buffet**

\$9.99 X 10 = \$99.90

**Subtotal: \$99.90**

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Fax: (585) 298-9574

[Empty Order](#)
[Check Out](#)
[My Account](#)
[Search](#)
[Policies](#)
[Tutorial](#)

Step 1  
Confirm Selection

Step 2  
Event Information

Step 3  
Review Selection

Step 4  
Checkout

Date Selection

5/28/2010

Good To Go!

< May 2010 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

< June 2010 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	

Delivery / Pickup

\*Method: Delivery

\*Delivery Contact: test test

\*Delivery Phone:

\*Building:

\*Room #:

☐ Copy Contact Information

Event Details

Additional service times may be available by prior arrangement. Please contact us to discuss your needs.

\*Food Delivery Time:

\*Event Start Time:

\*Guest Count:

Tax Exempt: ☐

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## Step 3: Review Selection

- In Step 3 of the check-out process, all you need to do is

review your cart to make sure everything is correct.

- If you need to make any changes, click on the shaded-out “Step 1” or “Step 2” at the top of the screen.

- When you are ready to proceed, click on “Continue>>”

**CaterTrax Catering Services** [Home](#) [My Account](#) [Contact Us](#)

Insert Logo Here

Empty Order Check Out My Account Search Policies Tutorial

Step 1 Confirm Selection Step 2 Event Information **Step 3 Review Selection** Step 4 Checkout

**Current Selections**  
[10] Breakfast Buffet \$9.99 X 10 = \$99.90  
Subtotal: \$99.90

**CATERTRAX**

Review your selection

Order Name:  [Update](#)

**Customer Information**

First Name: test  
Last Name: test  
Email: support@catertrax.com  
Work Phone: 585-427-8190

**Delivery / Pickup Information**

Method: Delivery  
Delivery Contact: test  
Delivery Phone: (585) 427-8190  
Building: test  
Room #: test

**Event Information**

Guest Count: 10  
Pick-up / Delivery Date: Friday, 5/28/2010  
Food Delivery Time: 8:00 AM  
Event Start Time: 8:00 AM

Description	Quantity	Unit	Price	Balance
<b>Breakfast Buffet</b> Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.	10		\$9.99	\$99.90
			Product Cost	\$99.90
			<b>Balance</b>	<b>\$99.90</b>

<< Add Another Order Cancel **Continue >>**

## Step 4: Checkout

- In Step 4 of the checkout process, you will need to enter payment information.
- After selecting a payment method, enter any necessary information.
- If required, please click on the link to read and “Accept the Terms and Conditions”.
- When you are finished, click on “Process This Order”.

CaterTrax Catering Services
Home My Account Contact Us

Insert Logo Here


Empty Order Check Out My Account Search Policies Tutorial

Step 1 Confirm Selection

Step 2 Event Information

Step 3 Review Selection

Step 4 Checkout

**\*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.**

Checkout

Please Select a Method for Payment

\*Payment Method: Cost Center

\*Cost Center Number:

CC Additional People (Optional):

Email Address(es)  
You may CC others on this order's correspondence  
(Please separate multiple email addresses with semicolons)

SSL Secure  
128-bit encryption

Cancel Process This Order

## Email Confirmation

- A copy of your invoice will appear on the screen. You will then have the option to print it or sync it to your Outlook.
- You will also receive a copy of the invoice in your email.

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[Home](#)
[My Account](#)
[Contact Us](#)

Insert Logo Here

**CaterTrax Catering Services**  
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W Henrietta, NY 14586  
Ph: (800) 975-184X  
Fax: (585) 298-9574

**\*\*\* If you are placing another order, please click the My Account button to begin the ordering process. DO NOT click on the Back Arrow.\*\*\***

**\*Please Note:** You will receive a confirmation email reviewing the details of your event.

[Printable Invoice](#)
[syncnow](#)
[Microsoft Outlook](#)

**Order Name: Test order**

**CaterTrax Catering Services**  
150 Lucius Gordon Dr. W  
Henrietta, NY 14586  
(800) 975-184X

**INVOICE #2**  
Friday, 5/28/2010  
Ordered On: 5/24/2010  
 **Confirmation Pending**

**Customer Information**

**First Name:** test

**Last Name:** test

**Email:** support@catertrax.com

**Work Phone:** 585-427-8190

**Delivery / Pickup Information**

**Method:** Delivery

**Delivery Contact:** test

**Delivery Phone:** (585) 427-8190

**Building:** test

**Room #:** test

**Payment Information**

**Payment Type:** Cost Center

**Event Information**

**Guest Count:** 10

**Pick-up / Delivery Date:** Friday, 5/28/2010

**Food Delivery Time:** 8:00 AM

**Event Start Time:** 8:00 AM

FOOD	Quantity	Price	Ext.
<b>Breakfast Buffet</b> Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.	10	\$9.99	\$99.90

**Order Totals**

Sub Total	\$99.90
Order Total	\$99.90
Balance Due	\$99.90



## How to Confirm Your Order

- After your order has been placed, you will receive an email that contains your order details and instructions on how to confirm your order.
- All you need to do is click on “Confirm Order” at the top of the email.
- There are also links to:
  - Request changes
  - Print your invoice

Subject: New Catering Request Order Number 2

[Confirm Order](#)

[Request Changes](#)

[Print Invoice](#)

Dear Test,

Thank you for booking your next important event with CaterTrax Catering Services. We look forward to making your event a delicious affair. **Please do not reply to this email!** \*Important\* Please review your order below and click on the "Confirm" link above to confirm your event. If you need to make changes or updates to your event, please use the "Request Changes" link. This is the most reliable way to ensure that we have all of the appropriate details for your event. If you have any questions, please call the catering office.

We look forward to serving your event! Thank you.

CATERTRAX

CaterTrax Catering Services  
150 Lucius Gordon Dr, W Henrietta, NY 14586  
(800) 973 TRAX

Invoice # 2

syncnow Microsoft  
Outlook

Pick-up / Delivery Date: 5/28/2010  
Food Delivery Time: 8:00 AM  
Event Start Time: 8:00 AM  
Event End Time:  
Food Clean-up Time:

Order Total: \$99.90

Grand total may be adjusted to accommodate any special requests.  
Click [here](#) to print or view an up to date version of this Invoice.



## How to Request Changes to Your Order

There are 2 ways to request changes to your order:

### Method 1:

- The “Request Changes” link in your email

### Method 2:

- Log into CATERTRAX
- Click on “Manage Orders”
- Click on “Track Order”

Both will bring you to the Change/Update Request Form. After completing the necessary information, click on “Send Change/Update Request”. The Catering Department will contact you via email when the changes have been made.

CaterTrax Catering Services
Home My Account Contact Us

Insert Logo Here

**USER NOTE:**  
Use this form to send us a note about your event. It will automatically send an email, and attach the note to the event for future reference.

**Change / Update Request Form**  
Use this Form to list any updates, changes or notes to your event. Your message will be emailed to the catering manager, and attached to the event for future reference. Please note that your Request should not be considered accepted until it is acknowledged by the catering department.  
  
**INVOICE # 2**  
Event Date: 5/28/2010  
Ordered On: 5/24/2010  
Confirmation Pending  
  
☒ Please check this box if you are Requesting changes to your event.

**You may request your changes on the form below:**

**Special Instructions**

**Order Details**

Item	Quantity
<b>Breakfast Buffet</b> Start the morning right with our fresh Breakfast Buffet! Homemade scrambled eggs made with farm fresh eggs. Egg substitute available upon request. Crispy bacon, breakfast sausage, pancakes and waffles are all included. Served with Orange Juice, Regular and Decaffeinated Coffee.	10

**Delivery / Pickup**

**\*Method:** Delivery  
**\*Delivery Contact:** test  
**\*Delivery Phone:** (888) 427-8190  
**\*Building:** test  
**\*Room #:** test

**Event Details**

Additional service times may be available by prior arrangement. Please contact us to discuss your needs.  
**\*Food Delivery Time:** 8:00 AM