



User Manual

Payment Portal

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Content

.....	3
Elecate Payment Portal	3
Accessing the Payment Portal.....	4
Log in with email and password	4
Processing a Payment.....	5
Upload/View attachments	7
Accept/View Contract.....	7
Admin Portal	9
Accessing the Admin Portal.....	10
Adding/Changing the Banner	10
Setting/Changing Theme Colors	10
Adding/Changing the Logo.....	10
General Settings	10
Shopping Cart Settings	10
Setting default referred by value	10
Assigning value to appsetting.....	11
Setting default customer payment terms	11
Assigning value to appsetting.....	12
Setting up idle session timeout	12
Setting as Payment Portal	13
Setting Final Payment Date	13
Setting Payment Gateway.....	14
Setting Email Confirmations.....	14

Elecate Payment Portal





Accessing the Payment Portal

Elecate cares about you, and your customer's safety. With that in mind, we enforce a process of accessing your profile and content, that guarantees only authorized individuals can access sensitive information and perform actions in the system.

⚡Sign up⚡

Creating a new account as a first time user is really easy:

1. Click on the Profile icon on the upper right corner
2. Click on *Sign Up*
3. Enter your email
4. Enter a password and confirm the password
5. Click on *Register*
6. Use those credentials to log in
7. Accept Terms & Conditions and Use of Cookies
8. Fill in your contact information
9. Click *Next*
10. Fill in your Billing Information
11. Click on *Save Information*

➡Log in with email and password➡

To log in using your email address and the password provided by your system administrator:

1. Click on the Profile icon on the upper right corner
2. Click on *Log In*
3. Enter your credentials click on *Sign In*

Elecate

Sign in to your account

Email

Password

☐ Remember me [Forgot Password?](#)

Sign In

Or you could link a social login to your Elecate account

Google

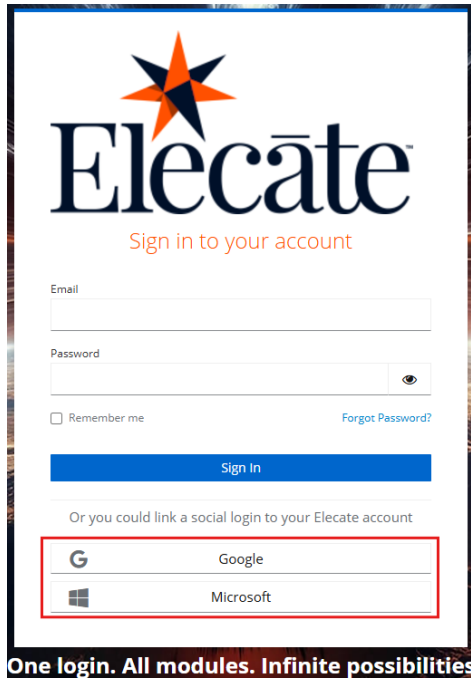
Microsoft

One login. All modules. Infinite possibilities

Use Social Login

To simplify the process of accessing the website, you can now sign in using your Google or Microsoft account.

1. Click on the Profile icon on the upper right corner
2. Click on *Log In*
3. Select one of the social log in options



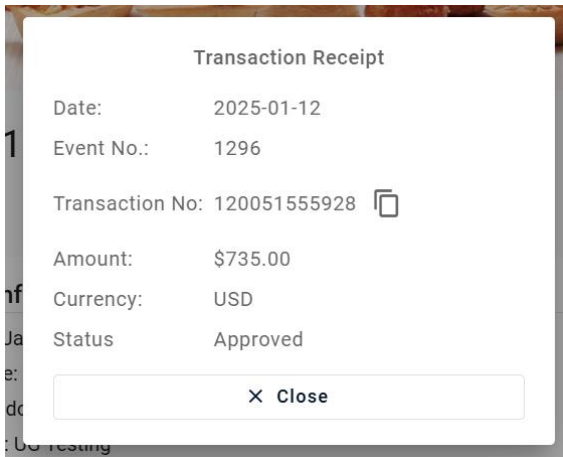
The image shows the Elecate login page. At the top is the Elecate logo with the tagline "Sign in to your account". Below this are input fields for "Email" and "Password". There is a "Remember me" checkbox and a "Forgot Password?" link. A blue "Sign In" button is present. Below the button, it says "Or you could link a social login to your Elecate account". Underneath are two options: "Google" with its logo and "Microsoft" with its logo. These two options are highlighted with a red rectangular box. At the bottom of the page, it says "One login. All modules. Infinite possibilities".

Processing a Payment

To process a payment:

1. From the *Order History*:
2. Click on the *Edit or Pay Order* icon located on the Actions column
3. Select the type of payment you want to make (Total, Minimum or Other for a custom amount)
4. Click *Accept*
5. Select your payment type
6. Register your payment method or select it if its been previously registered
7. Confirm you want to process the payment

After Processing the payment you will get a transaction receipt:



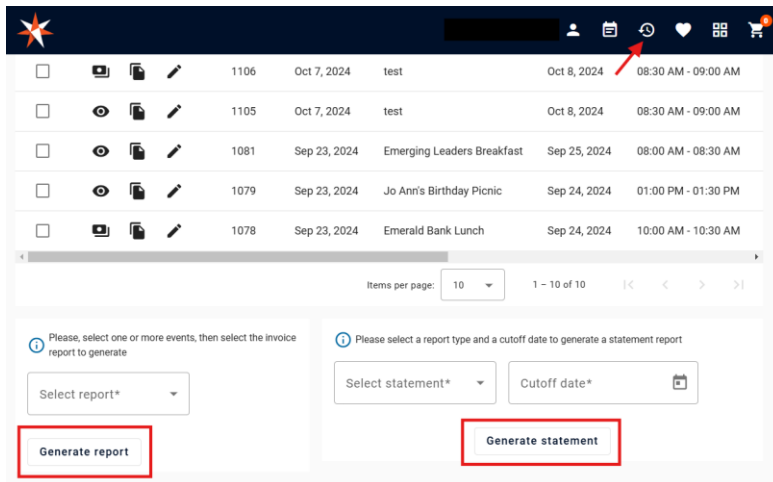
Reports

Available reports that can be printed from the portal include payment receipts, equipment packing lists, and statements.

Payment receipts and Equipment Packing lists can be printed from the order history or from the order itself. Statements can be printed only from the order history.

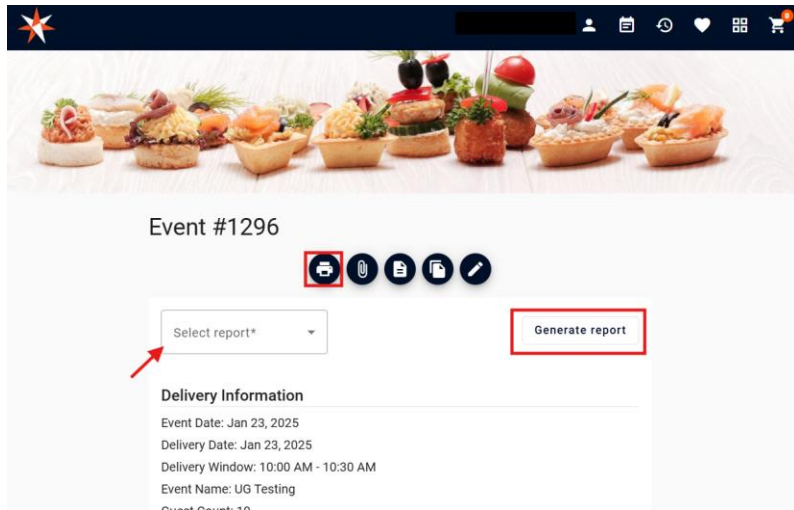
To print reports or statements from the order history:

1. Click on the order history icon located on the top right corner
2. Select the order or orders you want to include in your report
3. Scroll down and you will find the options to select the reports you want to print
4. Click on *Generate Report* or *Generate Statement*



To print reports from an order:

1. Click on the order history icon located on the top right corner
2. Click on the *View Order* icon or *Edit or Pay Order* icon located on the Actions column
3. Click on the printer icon
4. Select the report you want to print
5. Click on *Generate Report*

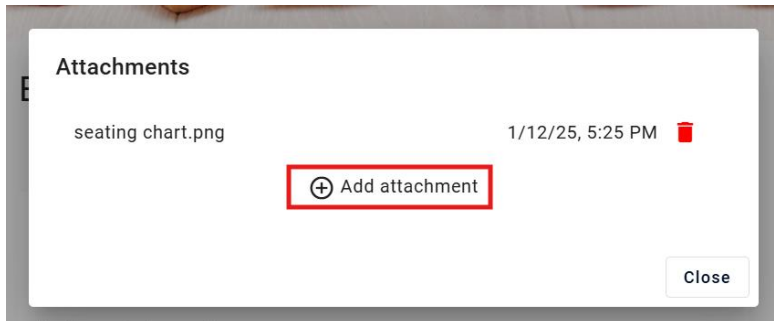


Upload/View attachments

Attachments can be uploaded from the shopping cart so they show on the Event Files, facilitating the communication between the customer and sales person.

To upload or view attachments on an order go to:

1. Click on the order history icon located on the top right corner
2. Click on the *View Order* icon or *Edit or Pay Order* icon located on the Actions column
3. Click on the clip icon

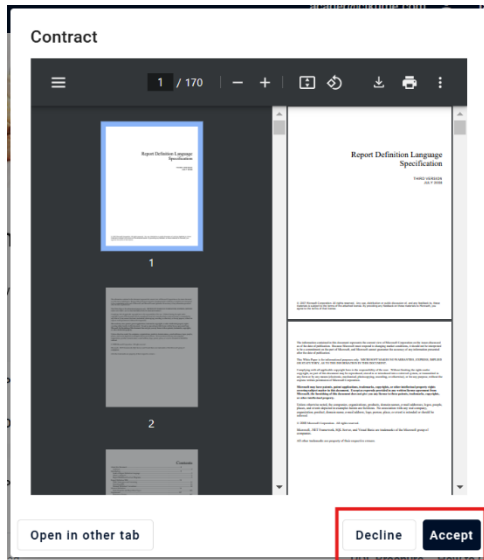


- To view an attachment just click on the attachment
- To upload a new attachment click on add attachment

Accept/View Contract

An order will be automatically moved to confirmed state after the customer signs the contract. To view and/or accept the contract go to:

1. Click on the order history icon located on the top right corner
2. Click on the *View Order* icon or *Edit or Pay Order* icon located on the Actions column
3. Click on the contract icon



Admin Portal





Accessing the Admin Portal

General Settings

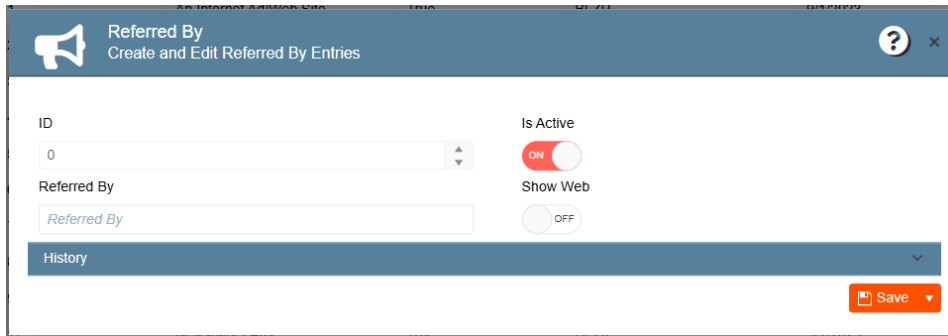
Shopping Cart Settings

For optimal shopping cart functionality, the Web order defaults must be created and assigned to the appsettings.

Setting default referred by value

Creating default referred by value for web orders:

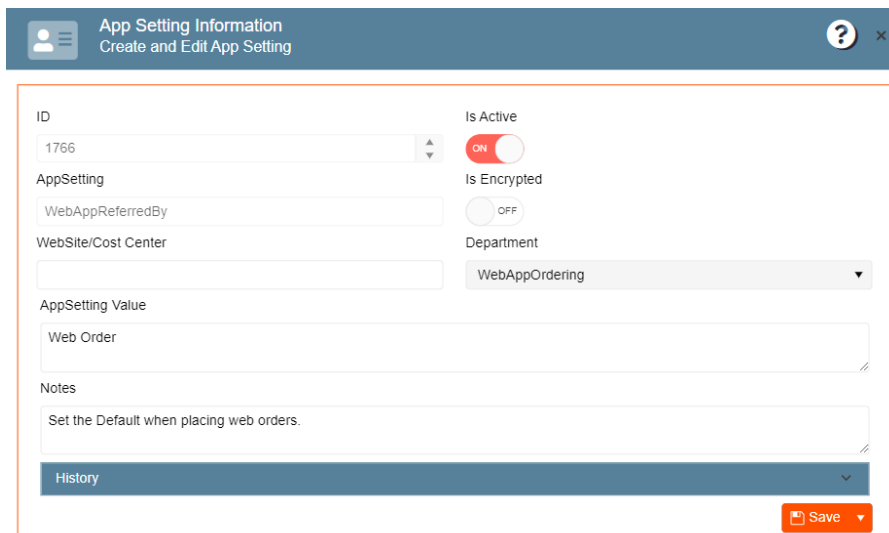
1. From the General Setup menu, enter the Marketing module
2. Navigate to the *Create and Edit Referred by Entries*.
3. Click on *New Entry*
4. Type the default value
5. Enable toggles "Is Active" and "Show Web"
6. Save changes



Assigning value to appsetting

1. Navigate to the gear icon
2. Go to *App Settings*
3. Look for “WebAppReferredBy”
4. Enter the value previously created for Web orders
5. Click *Save*




All new web orders will have this default value.



Setting default customer payment terms

Create/Edit customer payment terms value:

1. Navigate to the gear icon
2. Click on *Financial setup*
3. Select *Create and Edit Payment terms*
4. Click on *New Entry*
5. Type the new code
6. Click *Save*



Payment Terms
 Create and Edit Payment Terms
 


ID

☒ ON Is Active
 ☐ OFF Desktop
 ☐ OFF Web

Code




History

 Save

Assigning value to appsetting

1. Navigate to the gear icon
2. Go to *App Settings*
3. Look for WebAppCustomerTerms app setting
4. Enter the value previously created for Web orders.
5. Click *Save*

Any existing value for customer payment terms can be entered on this app setting. All new web orders will have this default value.


App Setting Information
 Create and Edit App Setting
 


ID

☒ ON Is Active
 ☐ OFF Is Encrypted

AppSetting


WebSite/Cost Center

Department

AppSetting Value

Notes

History

 Save

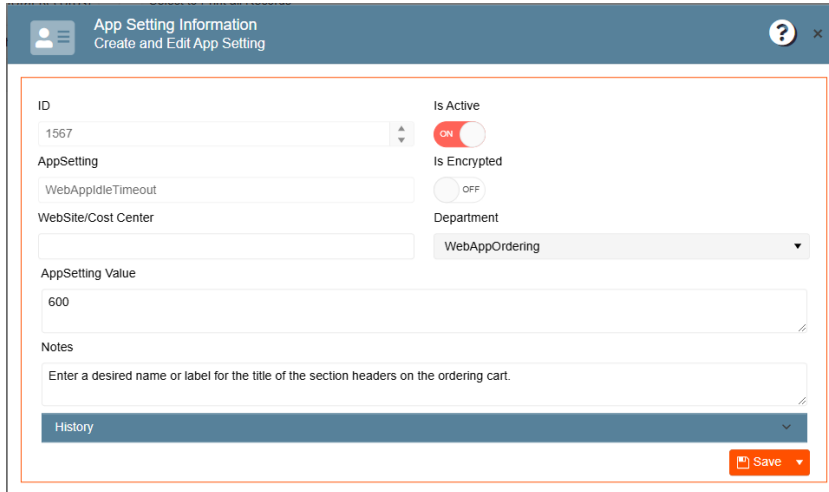
Setting up idle session timeout

Prevent unauthorized access to sensitive information by automatically signing out users after a period of inactivity.

To set up the idle session timeout go to:

1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “WebAppDefaultCustomerType” app setting

4. Enter the amount of time in seconds on the *App Setting Value*
5. Click *Save*



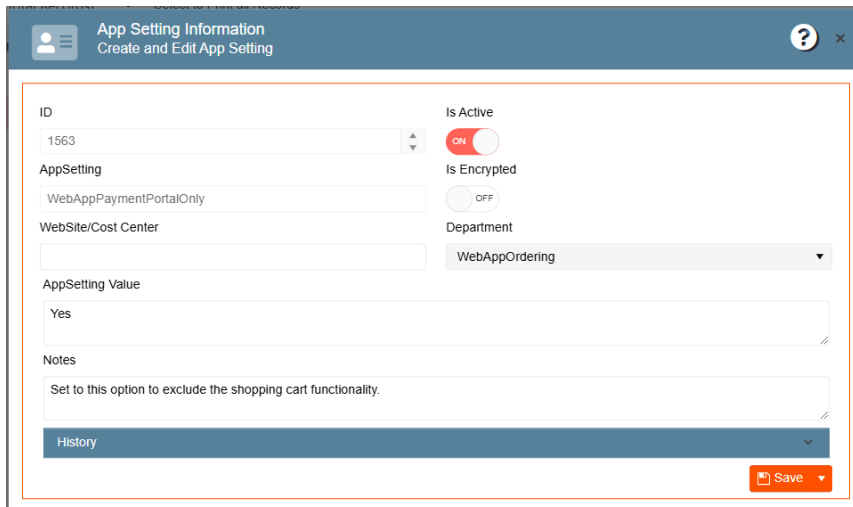
The screenshot shows the 'App Setting Information' form. The 'ID' field contains '1567'. The 'AppSetting' field contains 'WebAppIdleTimeout'. The 'WebSite/Cost Center' field is empty. The 'AppSetting Value' field contains '600'. The 'Notes' field contains 'Enter a desired name or label for the title of the section headers on the ordering cart.' The 'Is Active' toggle is turned ON. The 'Is Encrypted' toggle is turned OFF. The 'Department' dropdown menu is set to 'WebAppOrdering'. A 'History' button is at the bottom left, and a 'Save' button is at the bottom right.

Setting as Payment Portal

Set to this option provide the payment portal to your customers, excluding the shopping cart functionality

To set up as a payment portal go to:

1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “WebAppPaymentPortalOnly” app setting
4. Set the App Setting value to Yes
5. Click *Save*

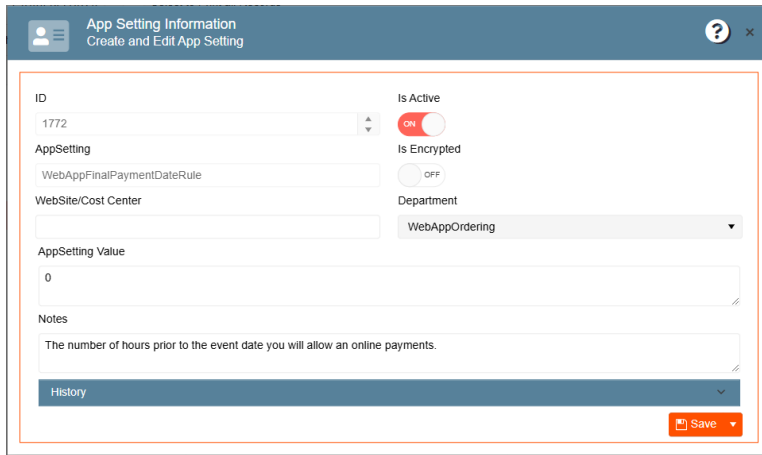


The screenshot shows the 'App Setting Information' form. The 'ID' field contains '1563'. The 'AppSetting' field contains 'WebAppPaymentPortalOnly'. The 'WebSite/Cost Center' field is empty. The 'AppSetting Value' field contains 'Yes'. The 'Notes' field contains 'Set to this option to exclude the shopping cart functionality.' The 'Is Active' toggle is turned ON. The 'Is Encrypted' toggle is turned OFF. The 'Department' dropdown menu is set to 'WebAppOrdering'. A 'History' button is at the bottom left, and a 'Save' button is at the bottom right.

Setting Final Payment Date

To set a number of hours prior to the event that you will allow online payments go to:

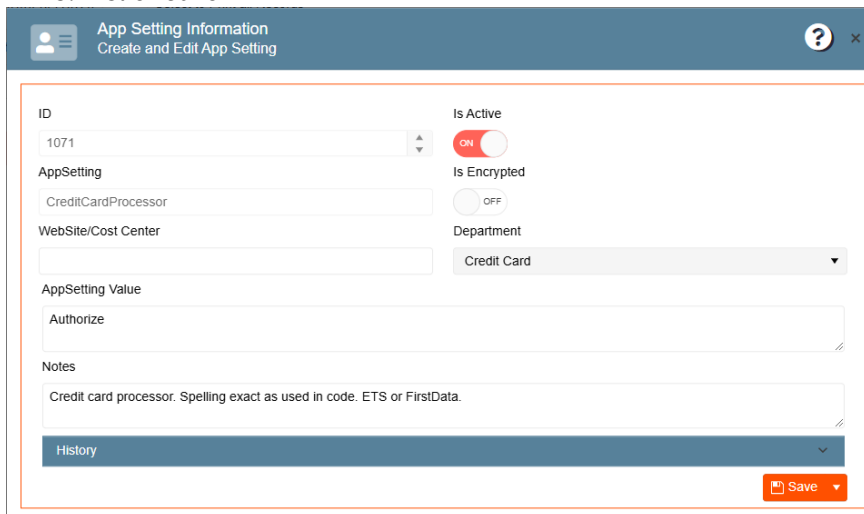
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “WebAppFinalPaymentDateRule” app setting
4. Set the App Setting value to Yes
5. Click *Save*



Setting Payment Gateway

To configure your credit card processor go to:

1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “CreditCardProcessor” app setting
4. Type in your credit card processor as used in code (OpenEdge or Authorize) in the app setting value
5. Click *Save*



Setting Email Confirmations

Sending email confirmations reassures the user that their request was processed correctly, it also provides a written record of the transaction or action, which can be useful for future reference.

You can configure confirmations for actions like:

- Placing an order
- Confirming an order

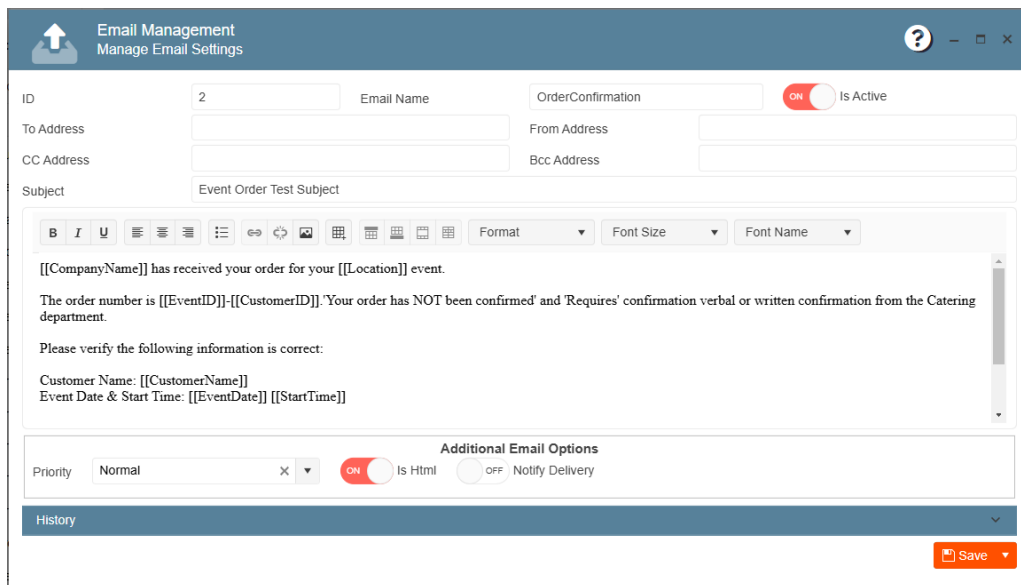
- Canceling an order
- Making a payment
- Sending an invoice
- Crerating a change request
- A change request is approved
- A change request is rejected

Setting up the email confirmations consists of two steps, first you have to create the template to then set the template in the app settings.

To create a template:

1. Navigate to the gear icon
2. Click on *Email Management*
3. Click on *New Entry*
4. Make sure the toggle is active for the template to be available
5. Type the template name
6. Fill in the template options
7. Click *Save*

Note: the double square brackets (“[[-]]”) are place holders for the system to fill information automatically, you can move these place holders to any part of the template, but if you remove the brackets the information will not be populated.



The screenshot shows the 'Email Management' interface with the 'Manage Email Settings' form. The form includes fields for ID (2), Email Name (OrderConfirmation), and a toggle for 'Is Active' (ON). It also has fields for To Address, CC Address, From Address, and Bcc Address. The Subject field contains 'Event Order Test Subject'. Below these fields is a rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, image, table, and other formatting options. The text area contains the following content:

[[CompanyName]] has received your order for your [[Location]] event.

The order number is [[EventID]]-[[CustomerID]]. Your order has NOT been confirmed' and 'Requires' confirmation verbal or written confirmation from the Catering department.

Please verify the following information is correct:

Customer Name: [[CustomerName]]

Event Date & Start Time: [[EventDate]] [[StartTime]]

At the bottom, there are 'Additional Email Options' including a 'Priority' dropdown set to 'Normal', a toggle for 'Is Html' (ON), and a toggle for 'Notify Delivery' (OFF). A 'History' section is visible at the bottom left, and a 'Save' button is at the bottom right.

To set the templates on the app settings go to:

1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the app setting of the email you want to configure:
 - Placing an order - WebAppPendingEmail
 - Confirming an order - WebAppConfirmedEmail
 - Canceling an order - Webappcancelationemail
 - Making a payment - PaymentPortalEmailTemplate
 - Sending an invoice - WebAppPaymentEmail



- Creating a change request - WebAppOrderChangeRequestedEmail
 - A change request is approved - WebAppOrderChangeAcceptedEmail
 - A change request is rejected - WebAppOrderChangeRejectedEmail
4. Click on the pencil icon or double click on the app setting row to edit
 5. Type in the Template Name on the app setting value
 6. Click Save

The following emails can include reports:

- Placing an order
- Confirming an order
- Canceling an order
- Making a payment
- Sending an invoice

To include reports along with those templates go to:

1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the app setting of the email you want to attach the report to:
 - Placing an order - WebAppPendingEmailReport
 - Confirming an order - WebAppConfirmedEmailReport
 - Sending an invoice - WebAppPaymentEmailReport
4. Click on the pencil icon or double click on the app setting row to edit
5. Type in the Report Name on the app setting value
6. Click Save

A screenshot of the "App Setting Information" form. The form has a header bar with a user icon, the title "App Setting Information", and a subtitle "Create and Edit App Setting". The main content area contains several fields: "ID" (1913), "AppSetting" (WebAppOrderChangeRequestedEmail), "WebSite/Cost Center" (empty), "AppSetting Value" (OrderChangeRequested), "Notes" (Enter the desired Email when a change is requested for an order.), and "History" (empty). On the right side, there are toggle switches for "Is Active" (on) and "Is Encrypted" (off), and a "Department" dropdown menu (WebAppOrdering). A "Save" button is at the bottom right.

Note: appsettings left with no value will not be effective even when active.