Elecāte™

INTELLIGENT **CATERING**+**EVENT**+**RENTAL** SOFTWARE

User Manual

Payment Portal

v 1 :: 1.30.2025

Content

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

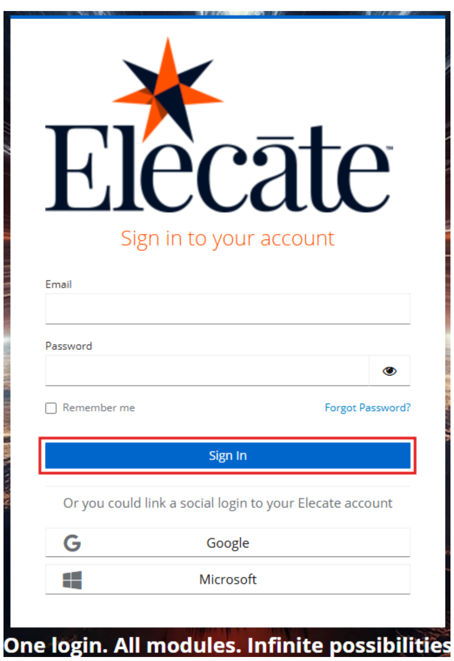
Creating a new account as a first time user is really easy:

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*



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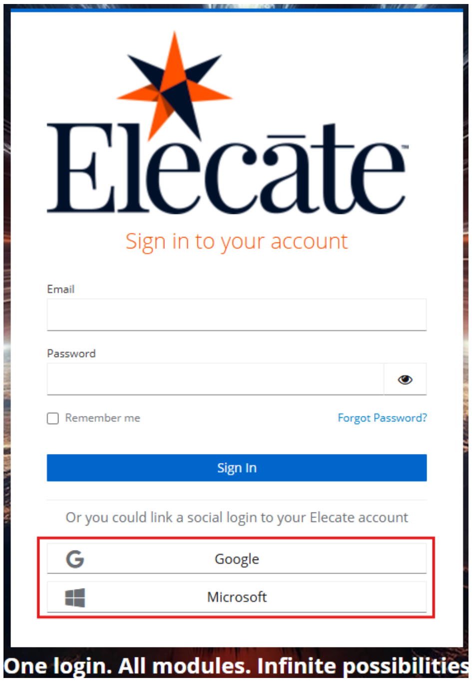
Use Social Login

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

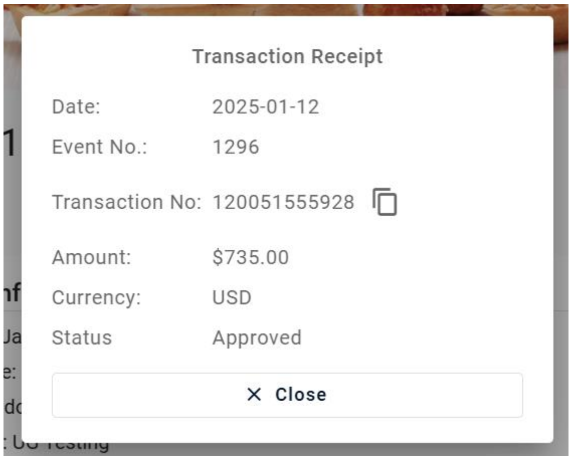


Processing a Payment

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:



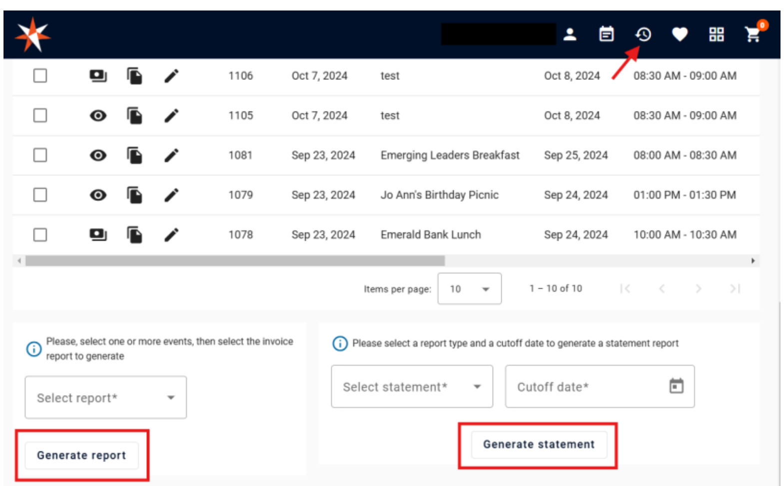
Reports

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.

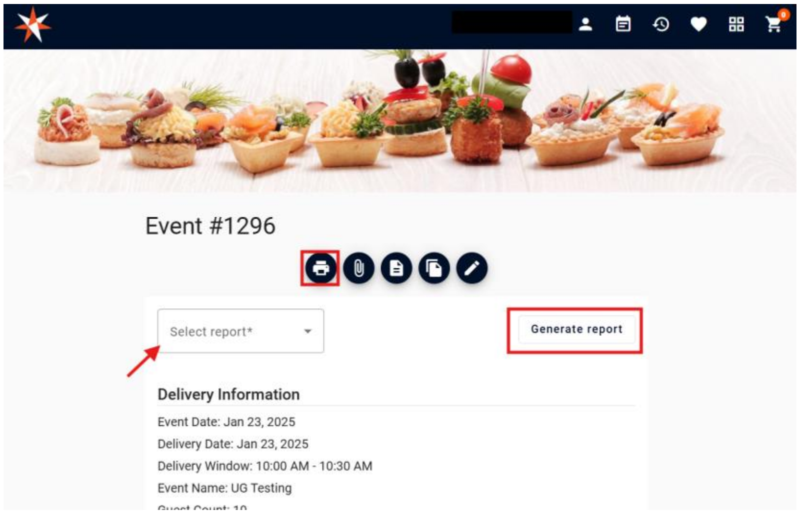
To print reports or statements from the order history:

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*

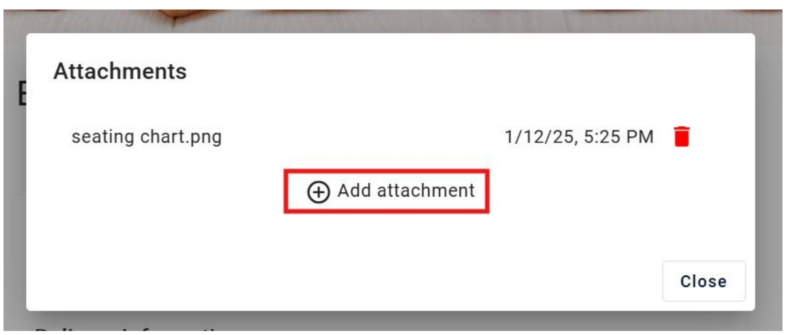


Upload/View attachments

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

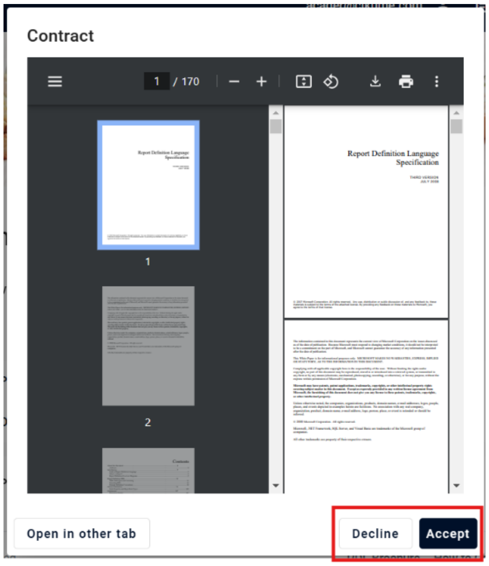


- To view an attachement just click on the attachment
- To upload a new attachment click on add attachment

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


Contract
1 / 170
Report Definition Language Specification
Open in other tab
Decline
Accept

Admin Portal

General Settings

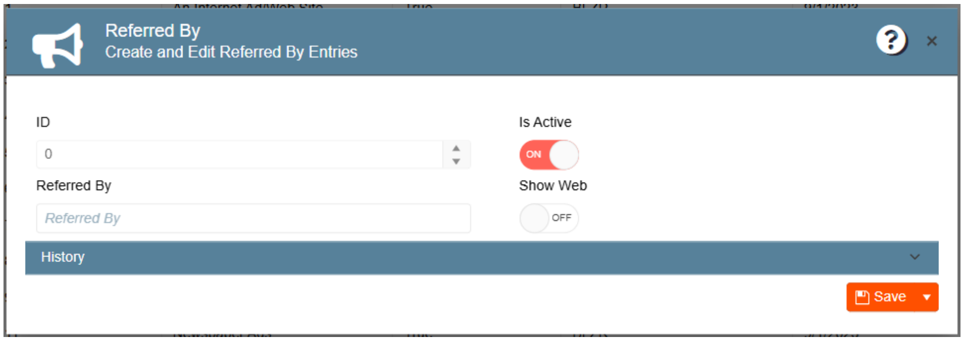
Shopping Cart Settings

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:

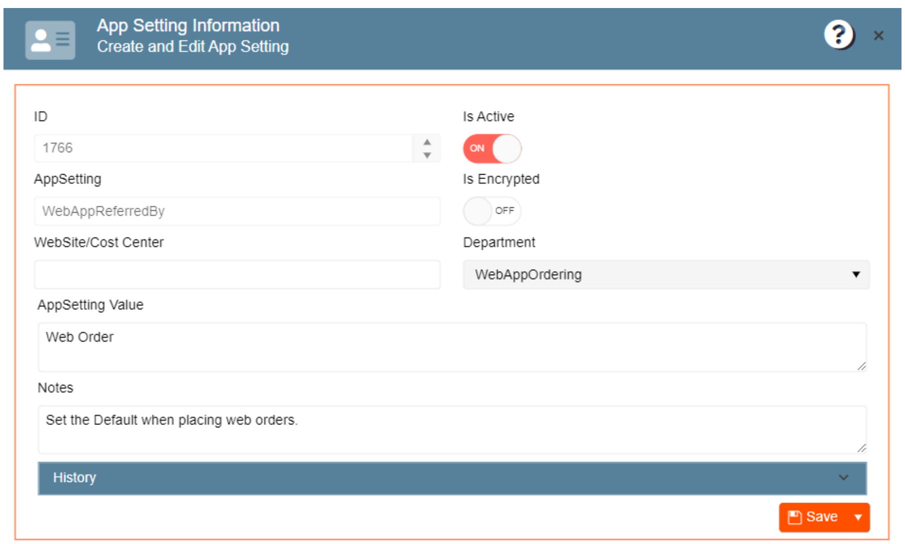
1. From the General Setup menu, enter the Marketing module
2. Navigate to the *Create and Edit Referred by Entries.*
3. Click on *New Entry*
4. Type the default value
5. Enable toggles "Is Active" and "Show Web"
6. Save changes



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*

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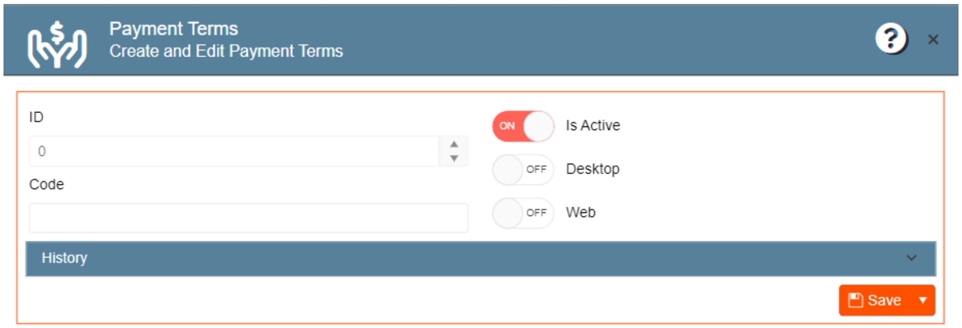
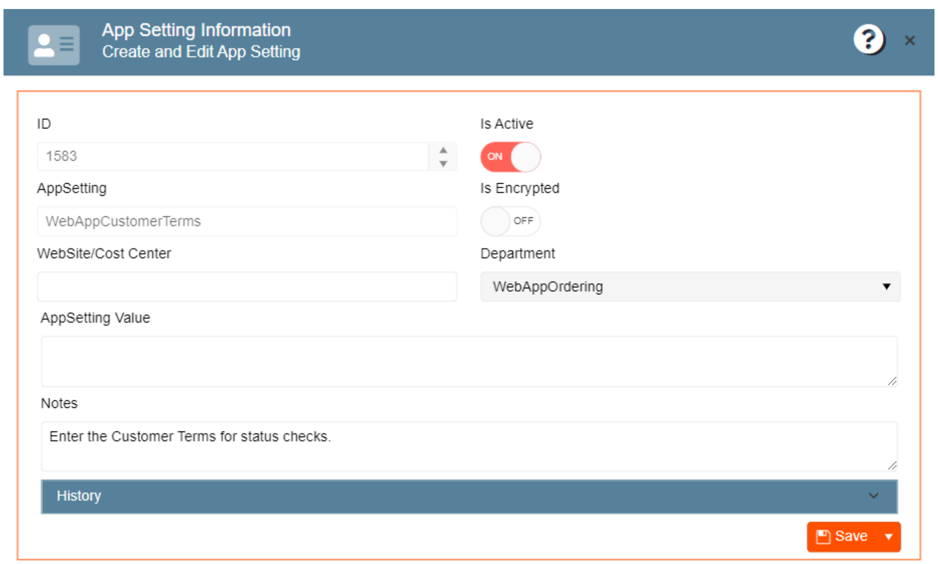


Assigning value to appsetting

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.



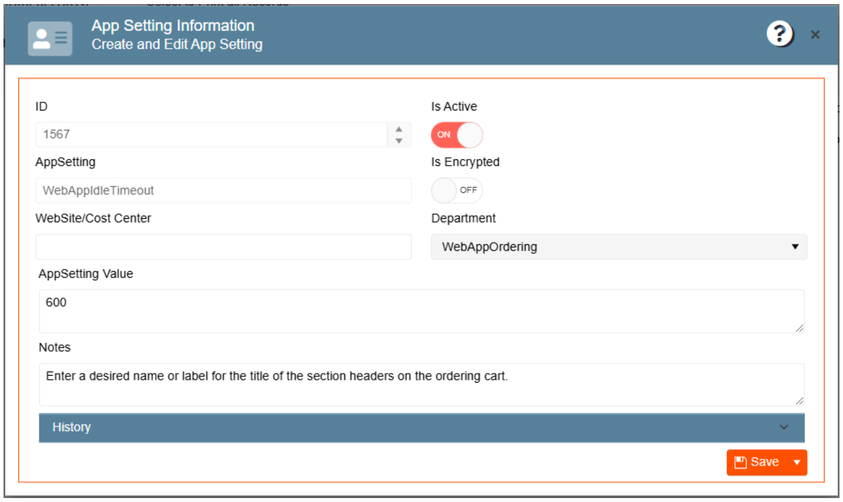
Setting up idle session timeout

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*

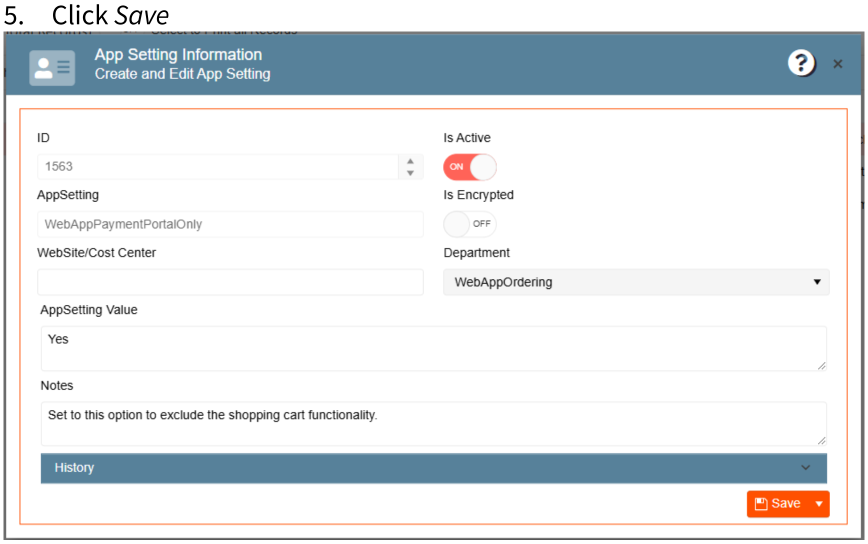


Setting as Payment Portal

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:

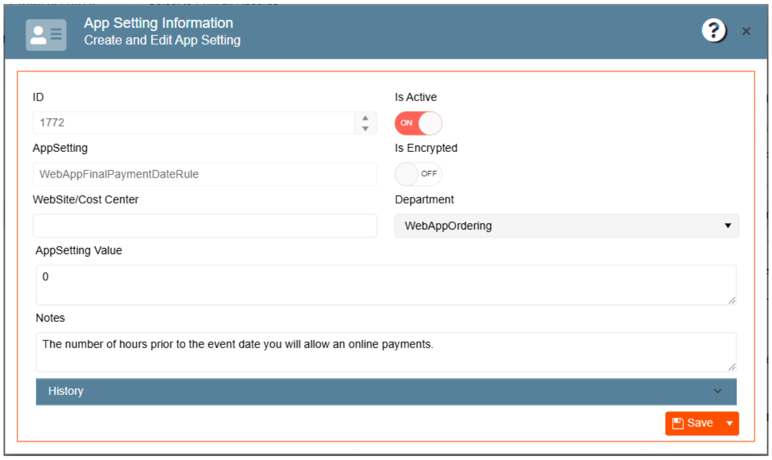
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the "WebAppPaymentPortalOnly" app setting
4. Set the App Setting value to *Yes*
5. Click *Save*



Setting Final Payment Date

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

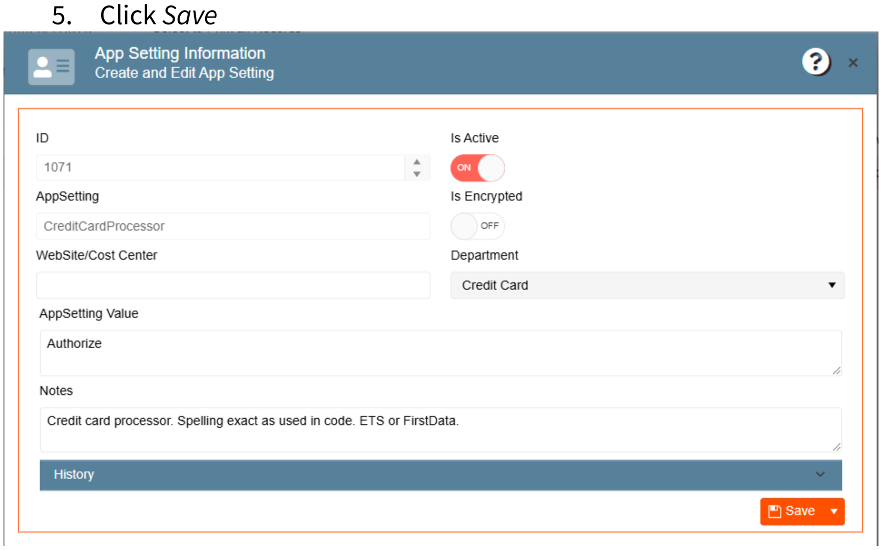
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the "WebAppFinalPaymentDateRule" app setting
4. Set the App Setting value to *Yes*
5. Click *Save*



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

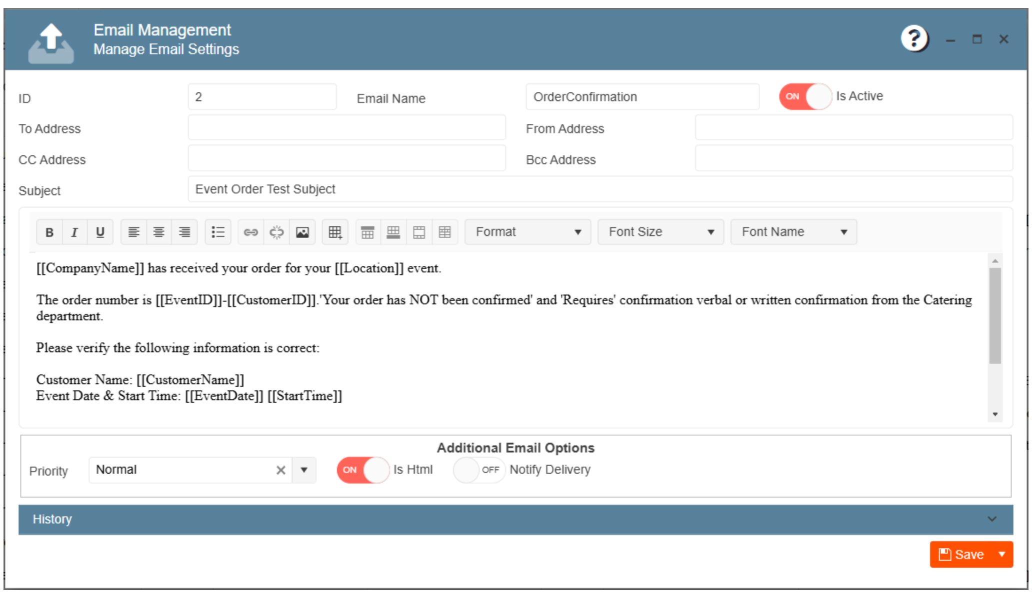
- Canceling an order
- Making a payment
- Sending an invoice
- Crerating a change request
- A change request is approved
- A change request is rejected

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.



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

- Crerating a change request - WebAppOrderChangeRequestedEmail
- A change request is approved - WebAppOrderChangeAcceptedEmail
- A change request is rejected – WebAppOrderChangeRejectedEmail

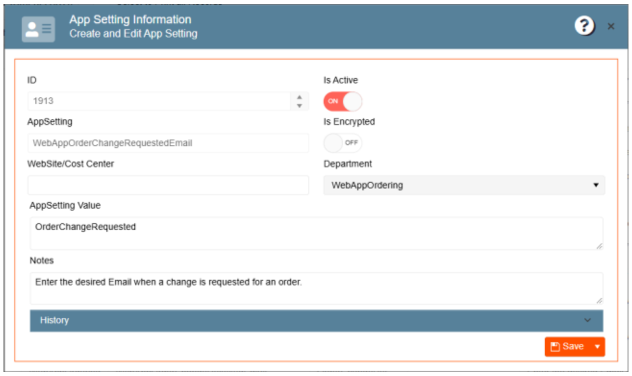
4. Click on the pencil icon or double click on the app setting row to edit
5. Type in the Template Name on the app setting value
6. Click Save

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



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