Elecāte™

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

User Manual

Shopping Cart & Portal

v 1 :: 1.30.2025

Content

Shopping Cart Portal

Accessing the Shopping Cart

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

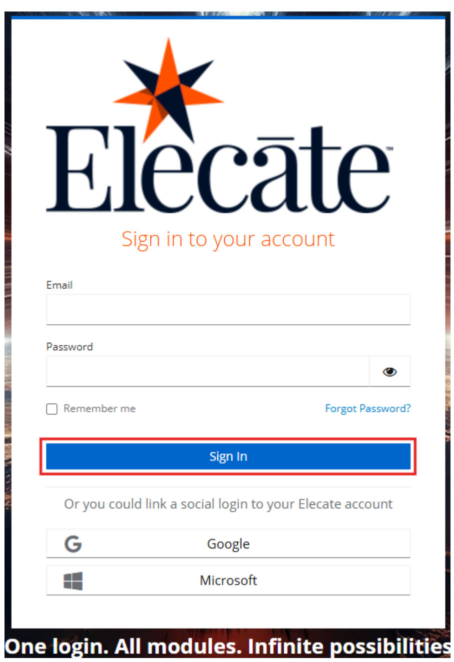
Creating a new account as a first time user is really easy:

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:

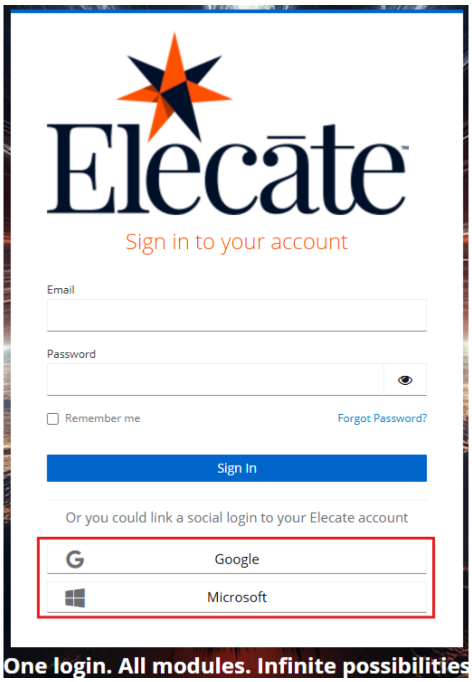
1. Click on the Profile icon on the upper right corner
2. Click on *Log In*
3. Enter your credentials click on *Sign In*



Use Social Login

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

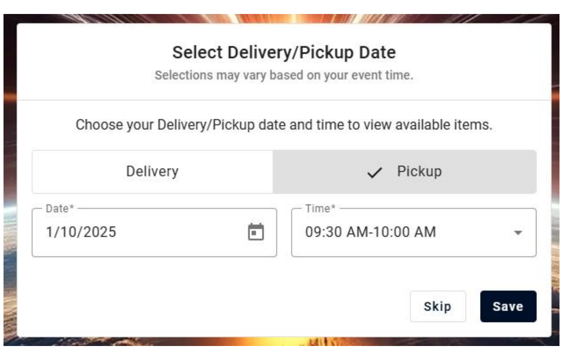
1. Click on the Profile icon on the upper right corner
2. Click on *Log In*
3. Select one of the social log in options



Selecting Event Date & Time

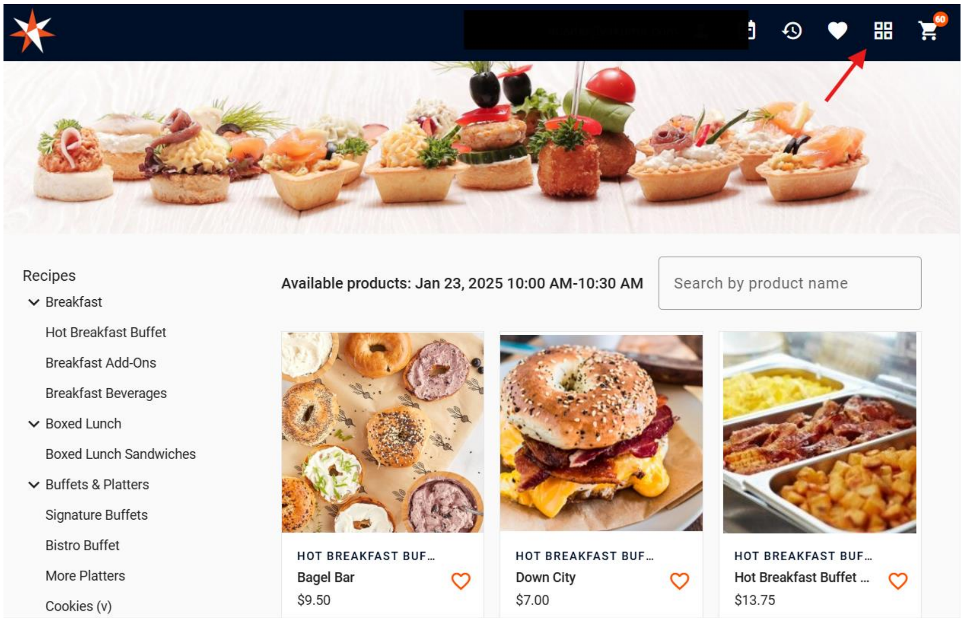
To view the products available for your event you must first choose your Delivery/Pickup date and time.

1. Click on the Calendar icon on the upper right corner
2. Select Delivery or Pick Up
3. Choose the event date
4. Choose the time you want to receive/pick up your order
5. Click *Save*



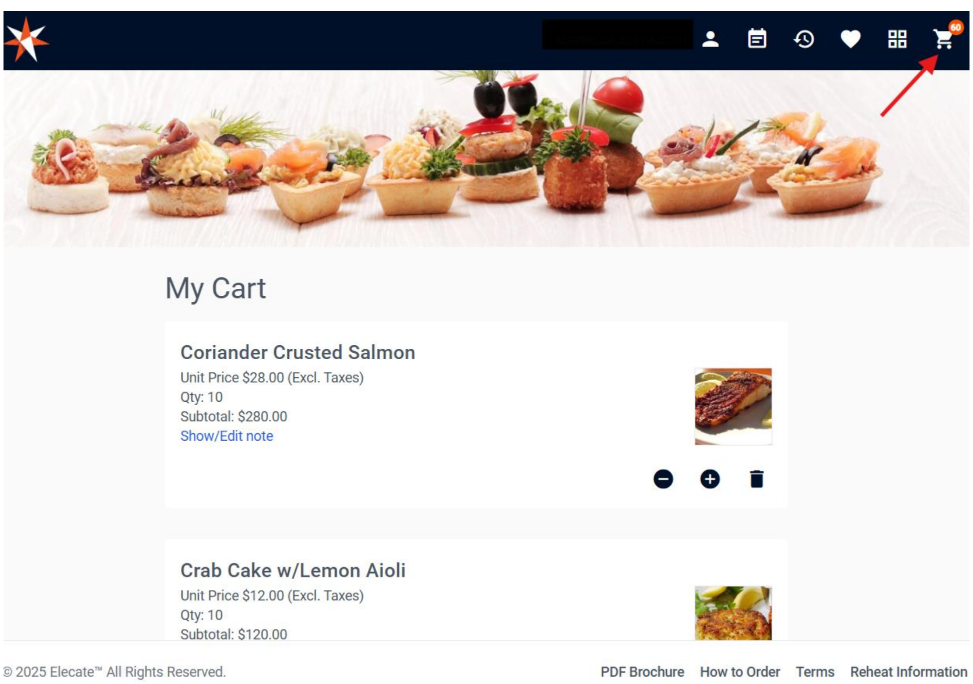
View Products

After selecting the date and time you will be redirected to the available products, but if you move to a different window you can go back to the available products by clicking on the four squares on the top right corner.



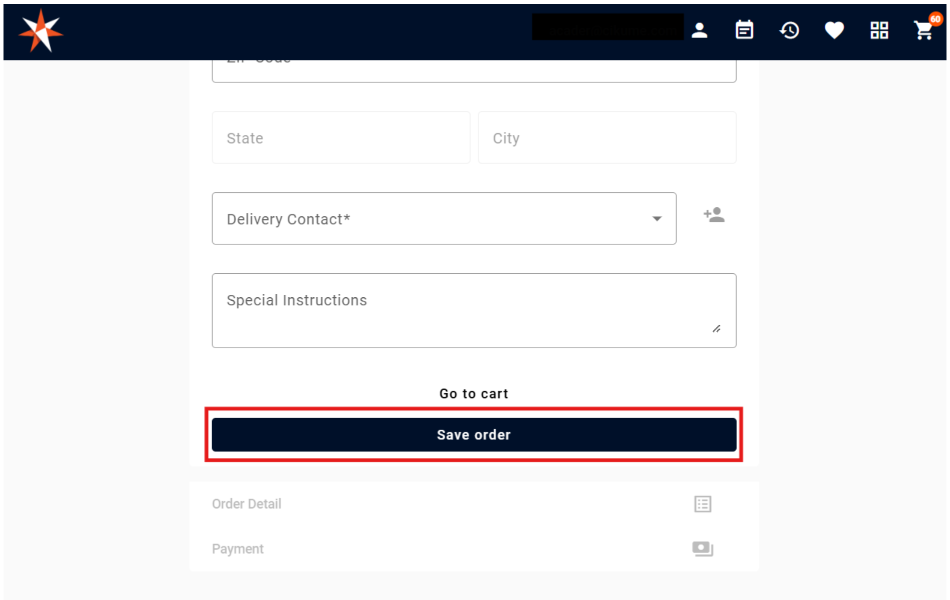
View Cart

To view the products you have added to the cart click on the cart icon on the upper right corner.



Saving an Order

To save an order for later, from the cart continue to the check out and click on *Save Order*.

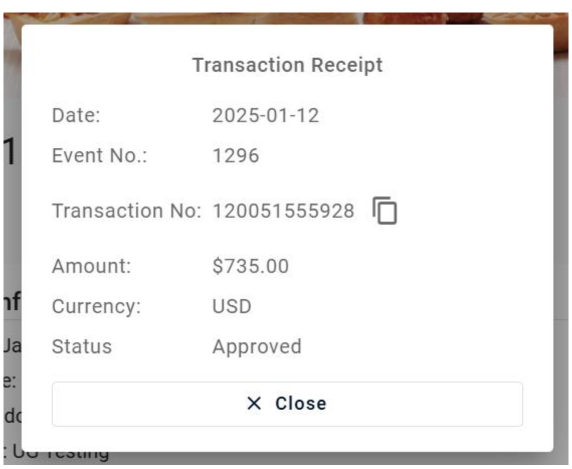


Processing a Payment

To process a payment:

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

After Processing the payment you will get a transaction receipt:



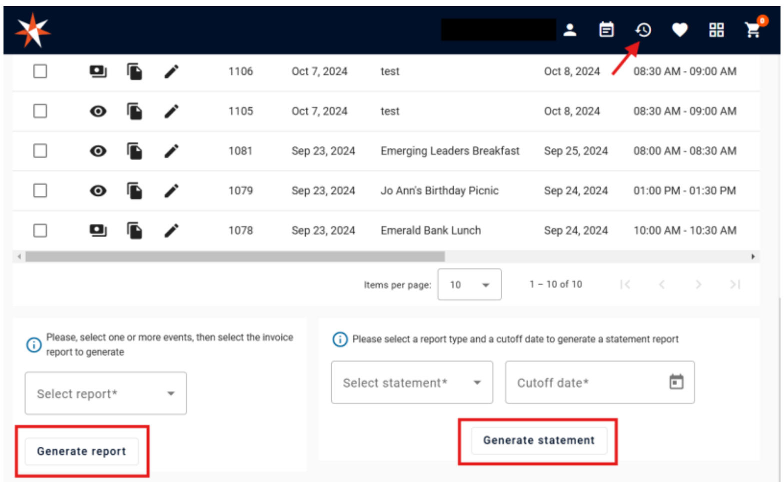
Reports

Available reports that can be printed from the online ordering 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.

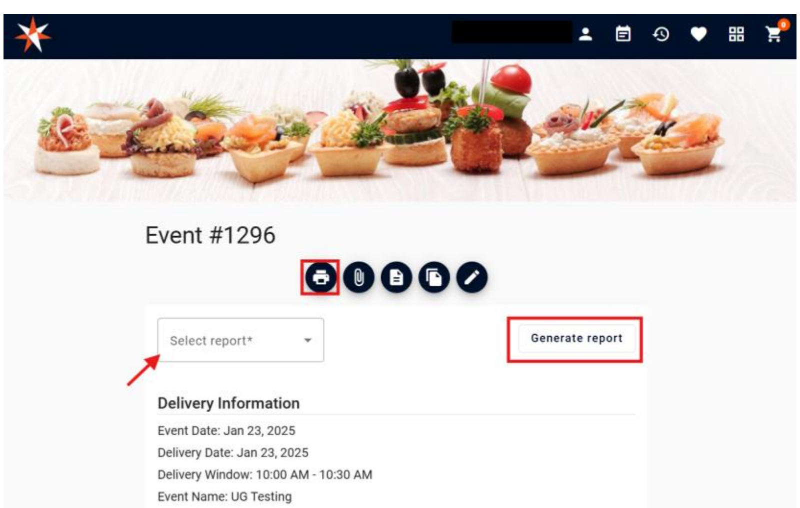
To print reports or statements from the order history:

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:

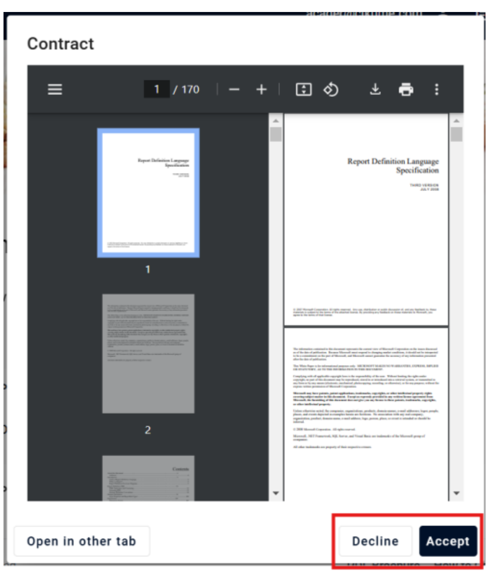
1. Click on the order history icon located on the top right corner
2. Click on the *View Order* icon or *Edit or Pay Order* icon located on the Actions column
3. Click on the clip icon

- 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

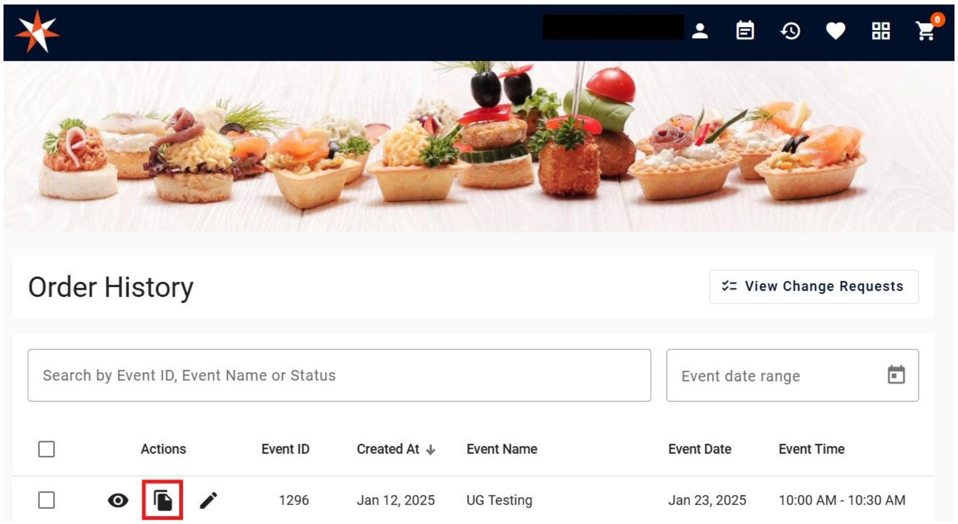


Copy Order

When copying a past order you will have the ability to edit the cart to add different items or remove existing ones, or you can proceed to checkout without making chages. This process simplifies placing an order with the same or similar items to a previous one.

To copy an order go to:

1. Click on the *Order History* icon located on the top right corner
2. Locate the order you want to copy
3. Click on the copy icon on the actions column



This action will add the items to the shopping cart so you can proceed with the order as usual.

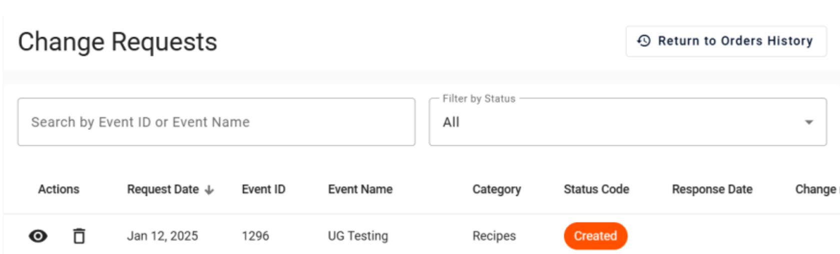
Making Changes on an Existing Order

Customers will be able to make changes on existing orders depending on the business rules set for the shopping cart, this will facilitate the communication between the customer and the sales person.

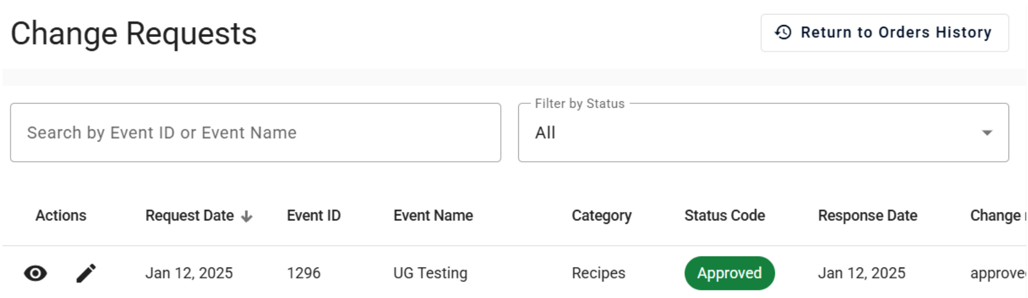
To make changes on an existing order go to:

1. Click on the *Order History* icon located on the top right corner.
2. Locate the order you want to copy.
3. Click on the pencil icon on the actions column.
4. This will take you back to the cart so you can add or remove products.
5. After making the changes click on *Submit Request.*

The order will show on the change requests list with the status of "Created"

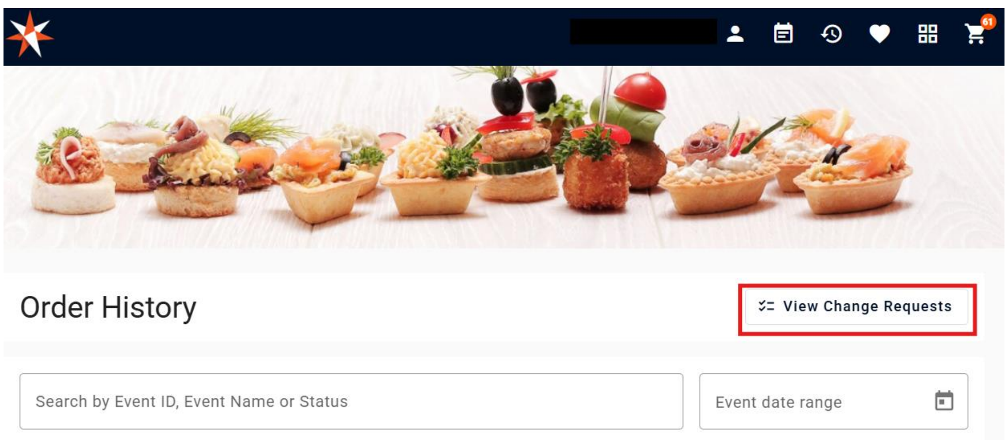


After the change request has been approved by the staff it will show as “Approved”.



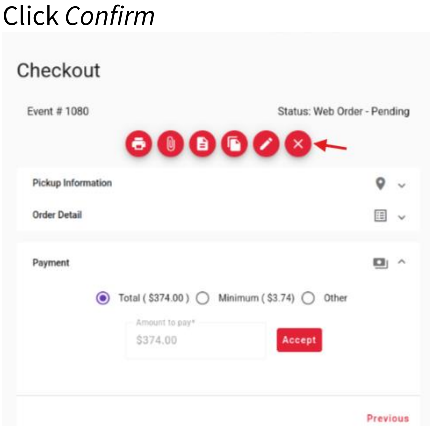
View Change Requests

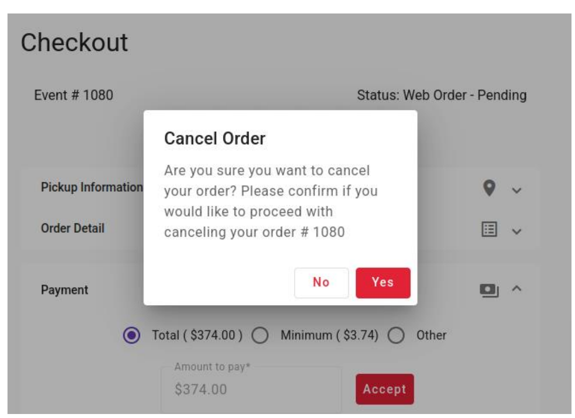
You can view all your change requests from the order history by clicking on *View Change Requests.*



Cancel Order

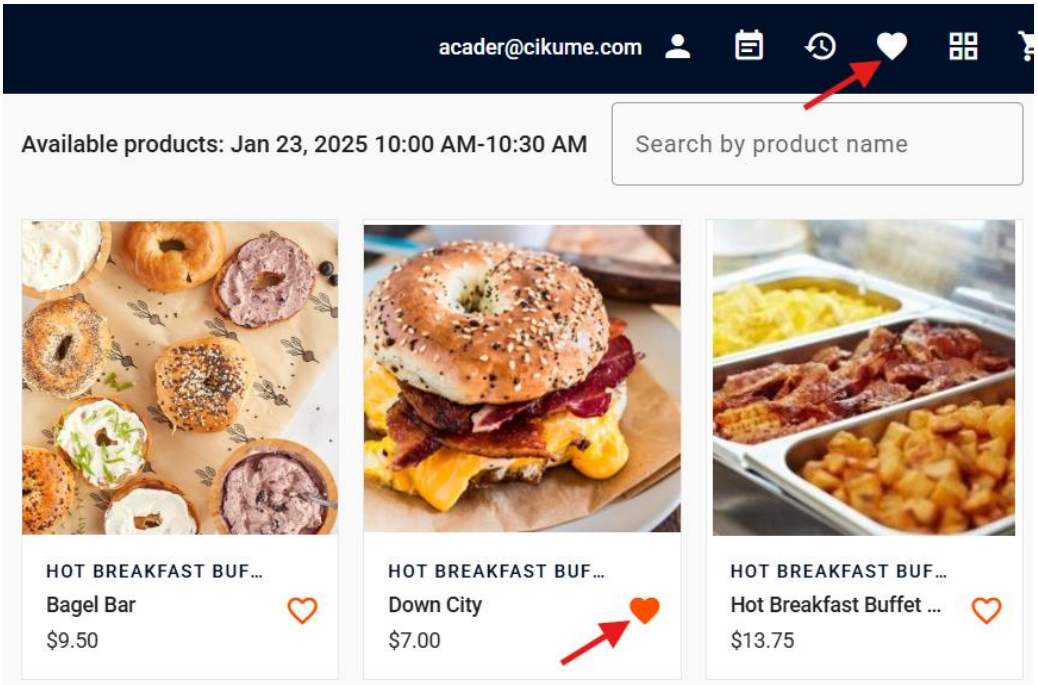
1. Click on the order history icon located on the top right corner
2. Click on the *View Order* icon located on the Actions column
3. Click on the cancel order or x icon
4. Enter the reason why you want to cancel the order
5. Click *Confirm*





Favorites

To find your favorite products easily you can mark them as favorite by clicking on the heart next to the product name, you can later view this products on the favorites tab.



Admin Portal

Accessing the Admin Portal

To Access the Admin Portal log in to the shopping cart with an admin user.

Adding/Changing the Banner

To add or change the current banner:

1. Log into the shopping cart with an admin user
2. Paste the URL on the *Background Image URL* field
3. Click *Save*

Setting/Changing Theme Colors

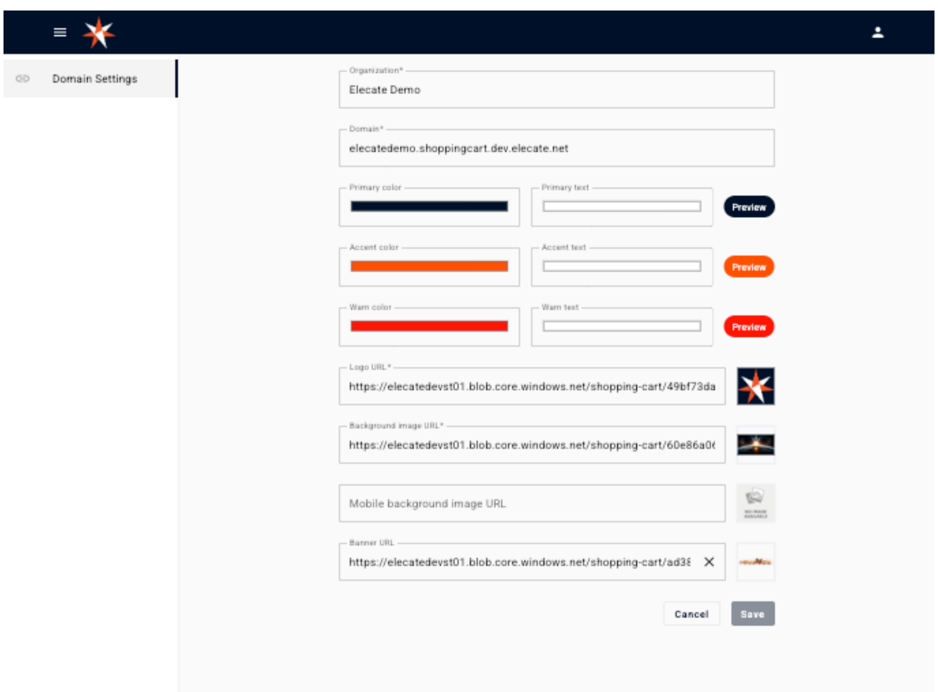
To add or change the current logo:

1. Log into the shopping cart with an admin user
2. Select the theme colors
3. Select the text color for each color
4. Click *Save.*

Adding/Changing the Logo

To add or change the current logo:

1. Log into the shopping cart with an admin user
2. Paste the URL on the *Logo URL* field
3. Click *Save*



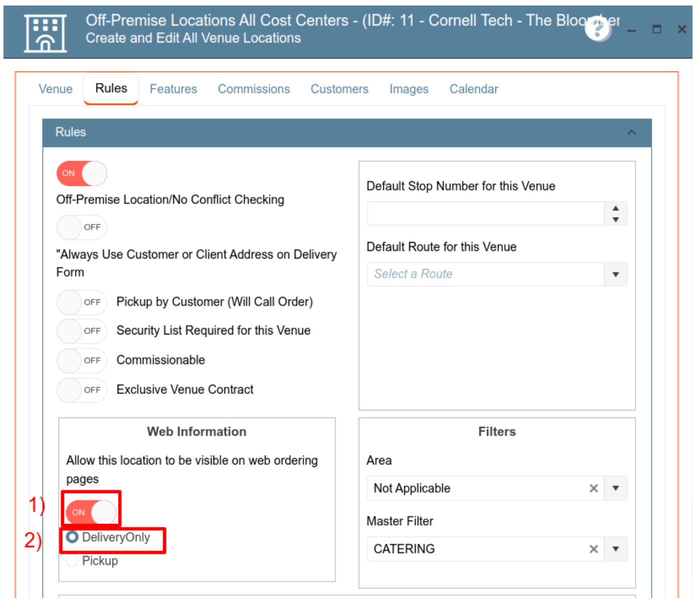
Business Settings

Business Rules

Your store needs important business rules set before customers can browse and orders can be placed. Be sure to follow the steps below to ensure proper setup. Discuss any questions you may have with your implementation specialist if you need more clarity.

Configuring Locations for Delivery + Pick Up

To be able to place orders, delivery and pick up locations should be enabled from empower, this is done from the venue management and should look like this for each scenario:



Creating and Grouping Data Items

For most units, we will be loading the data items and groups for you, which will include the group codes.

When you need to add new groups or subgroups in the application, you can follow these instructions or reach out to Elecate to help.

Creating a Web Group

1. Select the correct unit from the top dropdown
2. Navigate to the Gear Icon
3. Click *POS Web Item Management*
4. Click *POS Web Treeview Levels*
5. Click *New Entry*

Now, we will create a Recipe Group at the data item level.

1. Data Items
2. Food Management

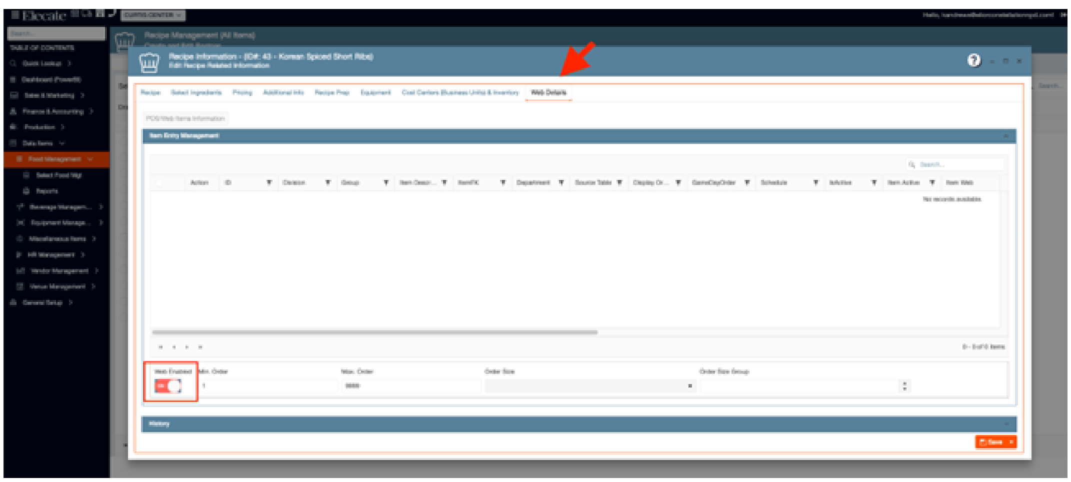
3. Recipe Group Manager
4. New
5. Create a new group. In this case, we'll create Snack. To properly order the Recipe Groups, follow the Group Code and Web Code structure we've set up.
6. Then, navigate to the Web/POS Setup tab and fill in the fields.

For more information on setting up the structure of your Web Groups, please refer to this FAQ.

Note- the Web Group will not appear on the shopping cart until it has an active recipe added to it.

Creating a Web Item

1. Select the correct unit from the top dropdown
2. Create a recipe like normal by following the below steps:
   a. Data Items
   b. Food Management
   c. Recipe Management (All Items)
   d. New Entry -> complete all required fields and save
3. Navigate to the Web Details Tab
   a. Toggle Web Enabled to On



4. Navigate to the gear icon to make the recipe web enabled by following these steps
   a. POS Web Item Management
   b. Item Entry Management
   c. New Entry
   d. Complete the POS/Web Items Information window:
      i. Department
         ▪ Select Food when putting in recipes, Select Menu when putting in packages
      ii. Source Table
         ▪ Select Recipe when inputting recipes, select Menu when inputting packages

iii. Web Division

- Select the WebDivision.

iv. Web Group

- Select the same sub-group as the data item.

v. Item

- Select from the dropdown list. Only items where web item has been toggled on at the data item level will appear ont his list

vi. Display Order

- Enter a number that corresponds to the order in which you want the items to display

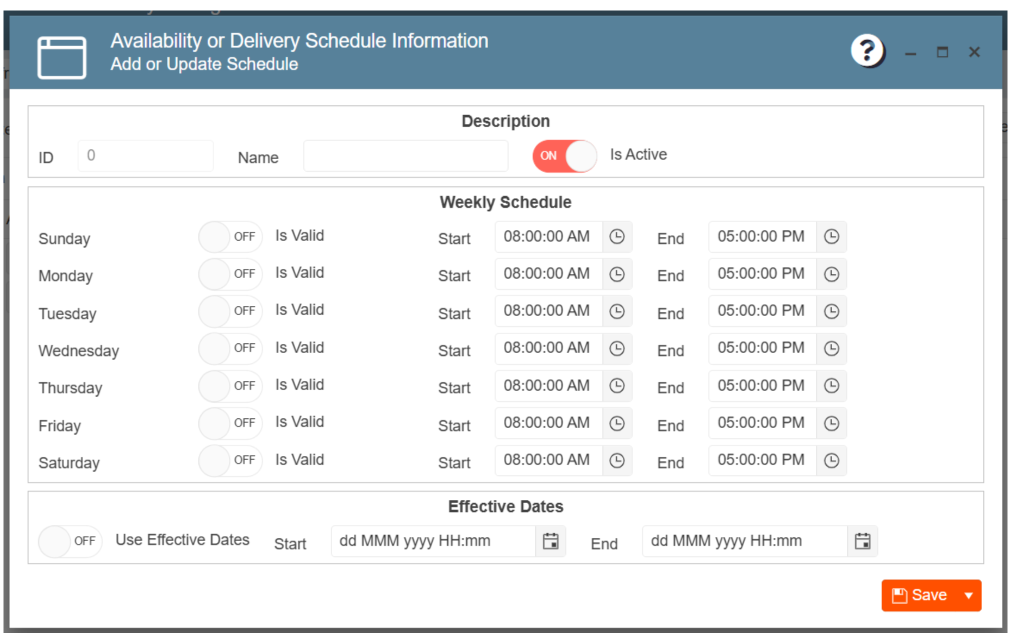
vii. Schedule

- Optional field to correspond with item availability

Setting a web item availability

Also called Online Ordering Schedule. For this function, appsetting UseDeliveryDateTimeForWebItems value should be “Yes”. Otherwise, the system will ignore all schedules, even if active.

1. Navigate to the Gear Icon
2. Click POS Web Item Management
3. Click *Item Availability Management*
4. Click on *New Entry*
5. Set up the desired schedule
6. Enter the schedule name
7. Click *Save*



Setting partial day closures

This functionality allows the administrator to configure partial day closures to prevent the user from placing orders on the selected schedule. The web portal will show a pop-up customizable message.

For this function, appsetting UseDeliveryDateTimeForWebItems value should be “Yes”. Otherwise, the system will ignore all schedules, even if active.

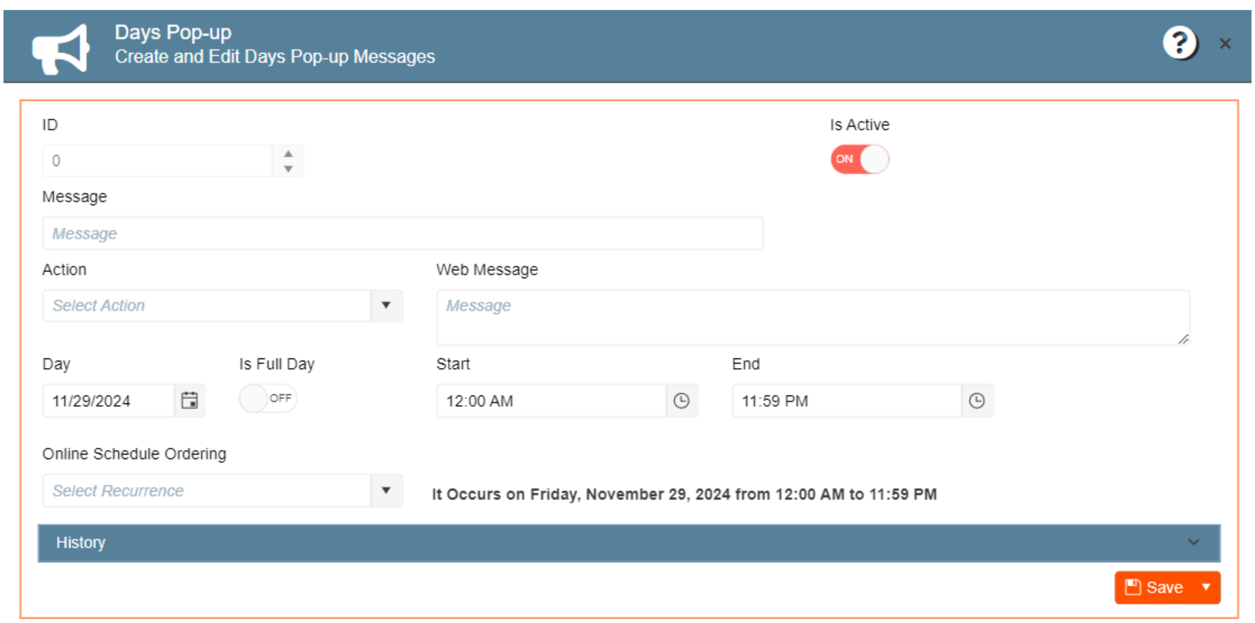
1. Display the General Setup side menu
2. Select Marketing module
3. Create and Edit Days Pop-up Messages
4. New Entry

   For a one-time message:

   a. Enter the message name. This will be the message title.
   b. Enter the Web Message. This will be the message content.
   c. Select a date
   d. Turn off the “Is Full Day” toggle.
   e. Select Start and End date
   f. Save

   For a recurring message:

   a. Enter the message name. This will be the message title.
   b. Enter the Web Message. This will be the message content.
   c. Select an *Online Ordering Schedule (Web Item Availability).*
   d. Click *Save*.

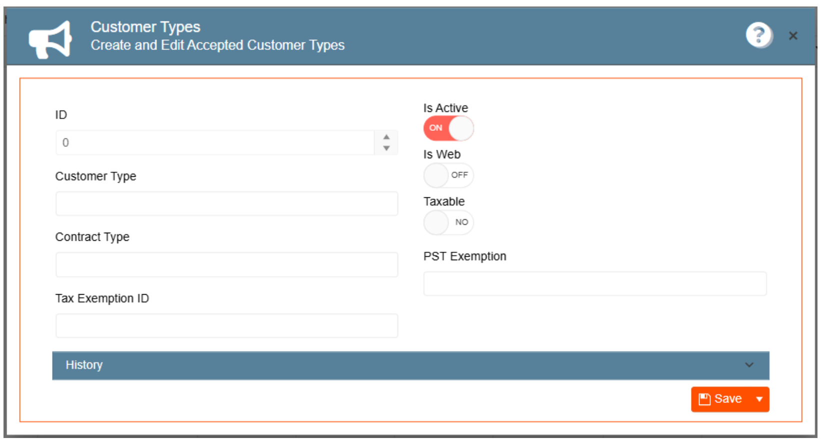


Setting Customer Types to Correspond to the Web Portal

As an initial set up, a customer type corresponding to the webportal has to be created and assigned to the appsetting WebAppDefaultCustomerType. This is a brand level configuration to avoid any issues with the user's initial registration.

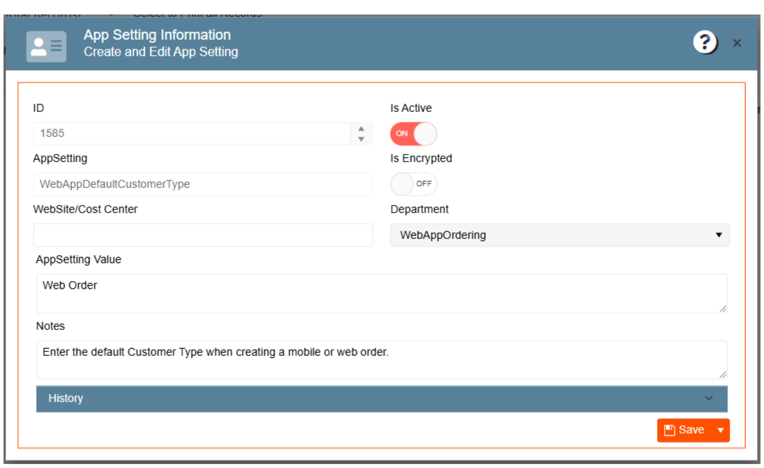
To create a customer type:

1. On the side panel go to *General Setup*
2. Go to *Marketing*
3. Select *Create and Edit Accepted Customer Types*
4. To create a new customer type click on *New Entry*
5. To edit an existing customer type click on the pencil icon or double click on the customer type row
6. Fill in the customer type information
7. Click *Save*



To set the default customer type:

1. Click on the gear icon
2. Click on *App Settings*
3. Search for the “WebAppDefaultCustomerType” app setting
4. Click on the pencil icon or double click on the app setting row
5. Type the default customer type on *App Setting Value*
6. Make sure the app setting toggle is active
7. Click *Save*



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

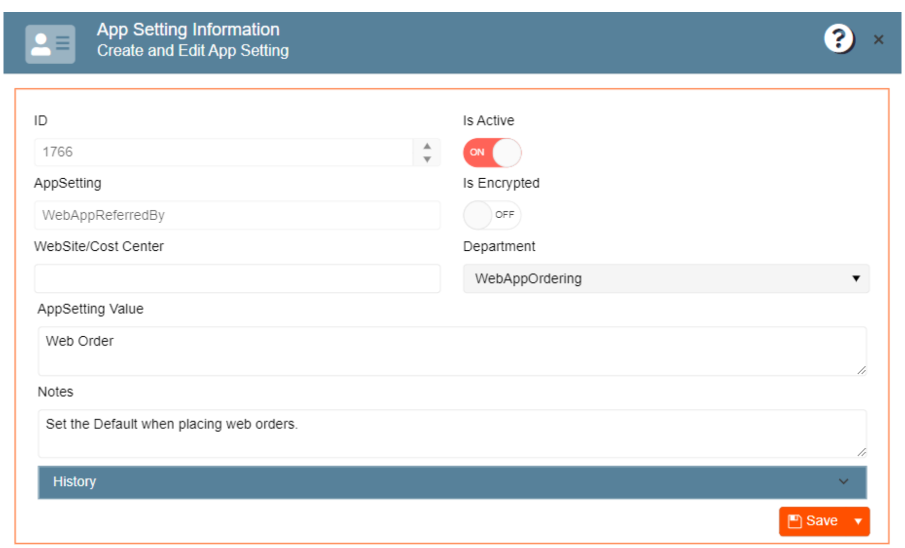
Creating default referred by value for web orders:

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*

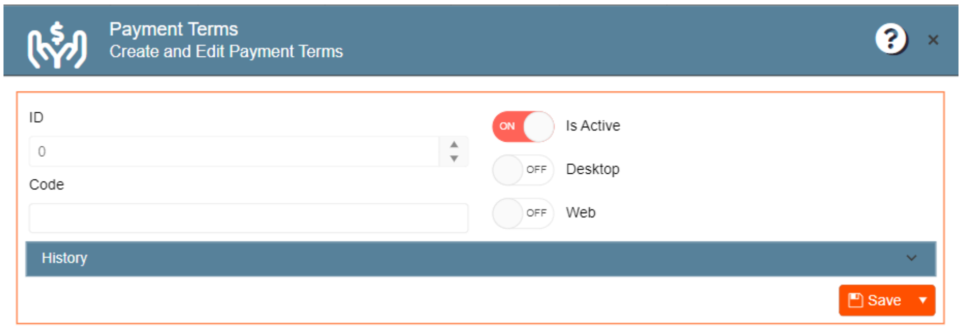
All new web orders will have this default value.



Setting default customer payment terms

Create/Edit customer payment terms value:

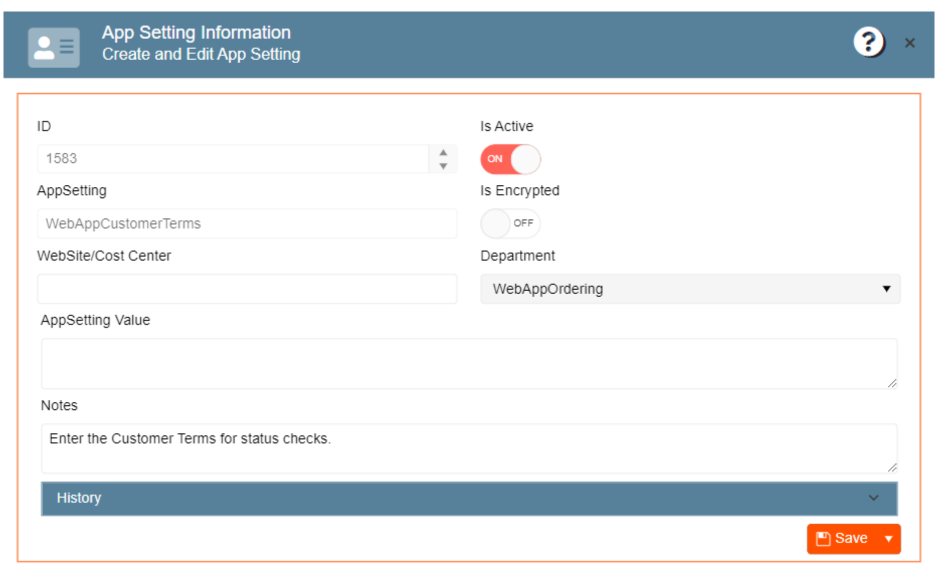
1. Navigate to the gear icon
2. Click on *Financial setup*
3. Select *Create and Edit Payment terms*
4. Click on *New Entry*
5. Type the new code
6. Click *Save*



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*

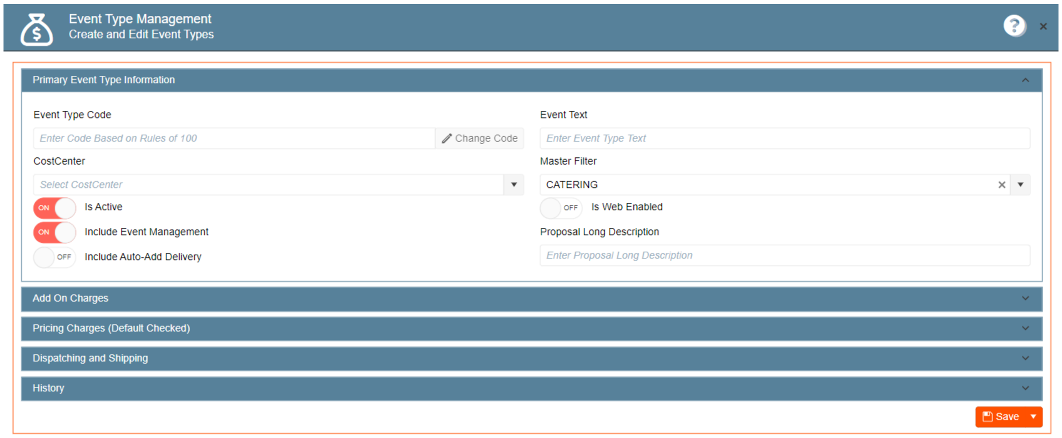
Any existing value for customer payment terms can be entered on this app setting. All new web orders will have this default value.



Setting default event type

Create Event type value:

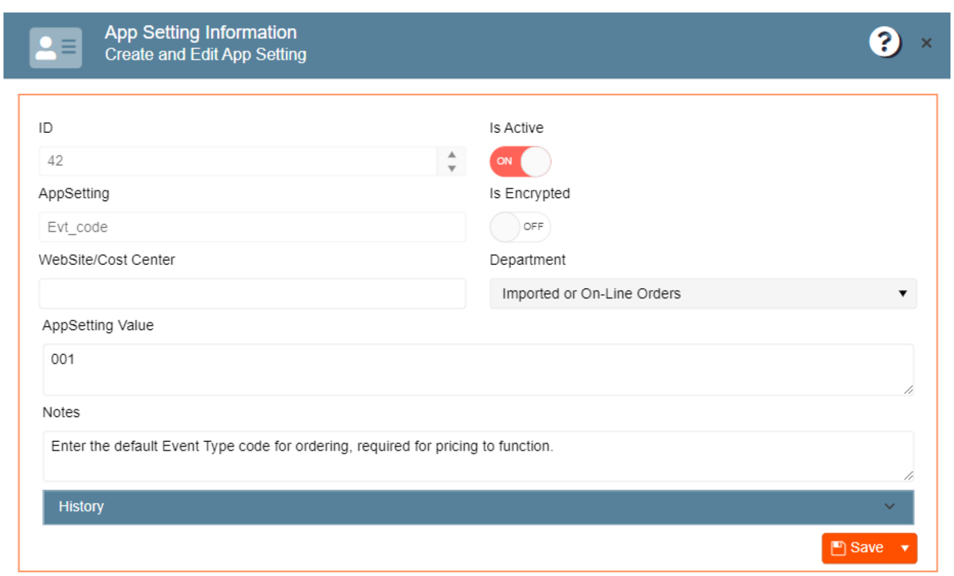
1. Navigate to the gear icon
2. Financial setup
3. Create and Edit Event Types
4. Click on *New Entry*
5. Enter the Event Type Code
6. Enter Event Text
7. Select a cost center from the drop down
8. Click *Save*



Assigning value to appsetting:

1. Navigate to the gear icon
2. Go to *App Settings*
3. Look for "Evt_code" app setting
4. Enter the value previously created, this must be the Event Type Code.
5. Click *Save*

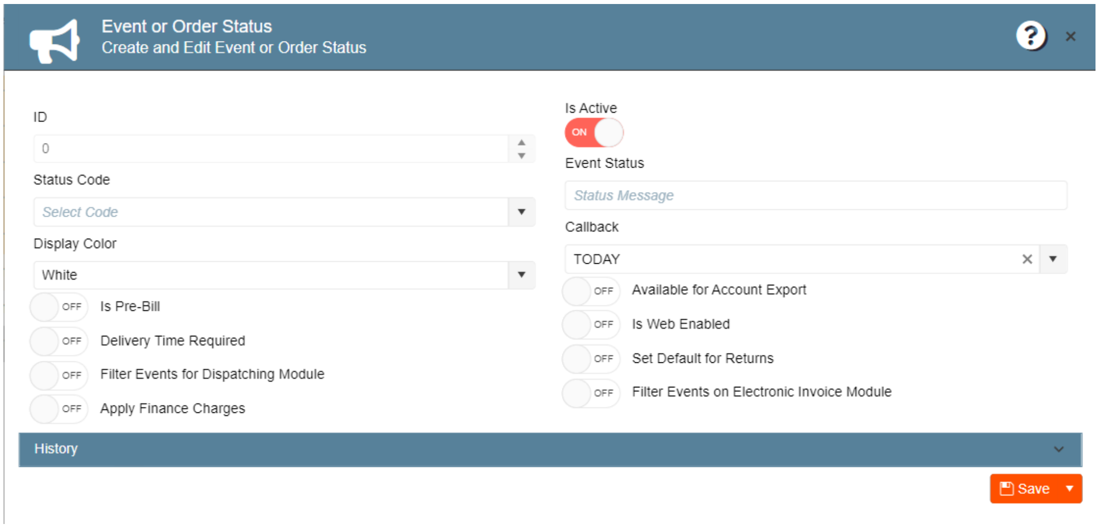
Any existing value for event type can be entered on this app setting. All new web orders will have this default value.



Setting default values for order status

Create Event type value:

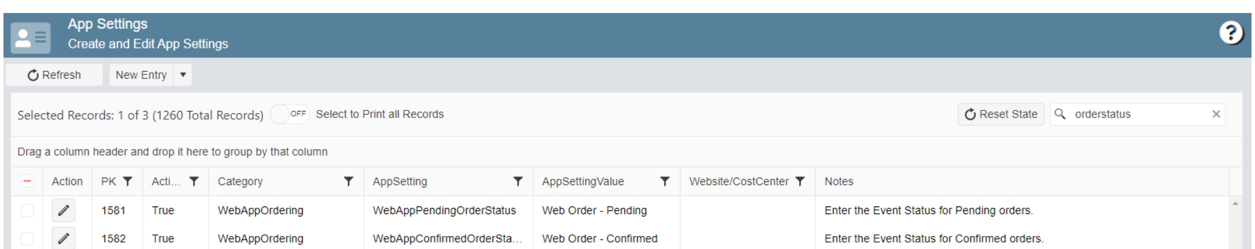
1. Navigate to the gear icon
2. Go to *Financial setup*
3. Select *Create and Edit Event or Order Status*
4. Click on *New Entry*
5. Enter Event Status
6. Enter Status Code
7. Click *Save*



Assigning value to the appsetting

1. Navigate to the gear icon
2. Click on *App Settings*
3. Look for the following app settings:
   a. WebAppPendingOrderStatus,
   b. WebAppConfirmedOrderStatus
4. Enter the desired value for each corresponding appsetting, this must be the Event Status.
5. Click *Save*

Any existing value for order status can be entered on this app setting. All new web orders will have this default value.

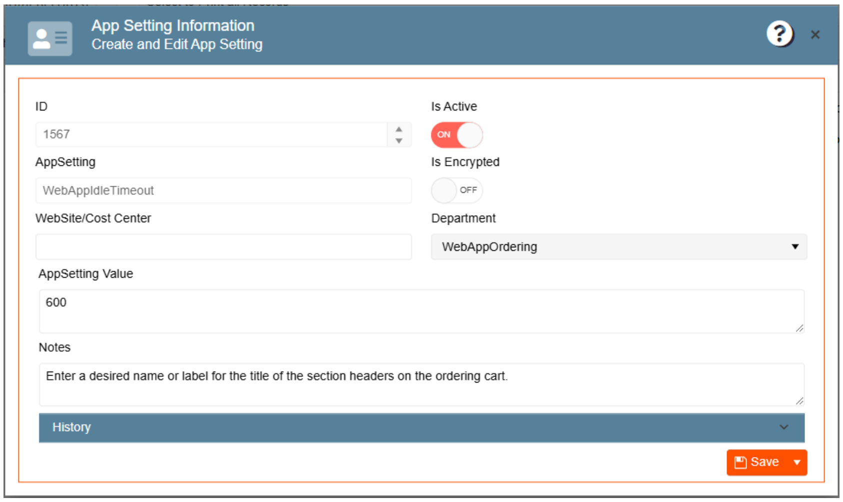


Setting up idle session timeout

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*

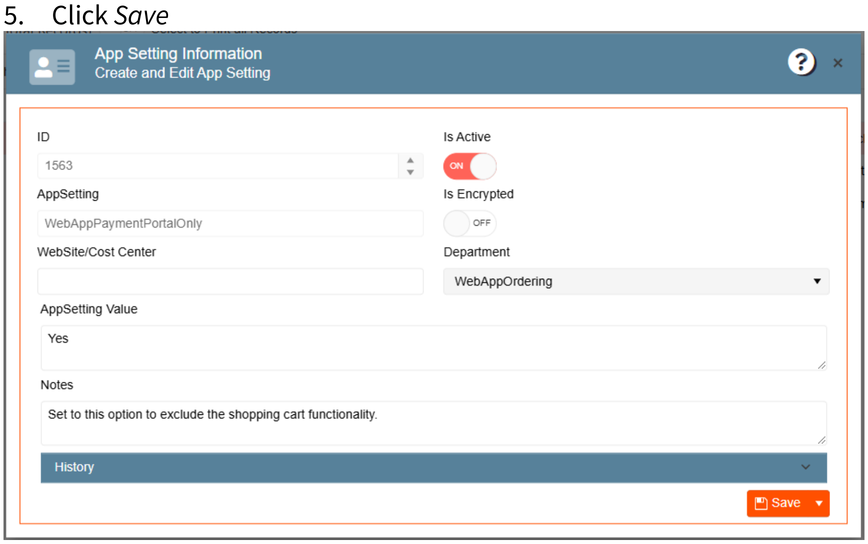


Setting as Payment Portal

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*

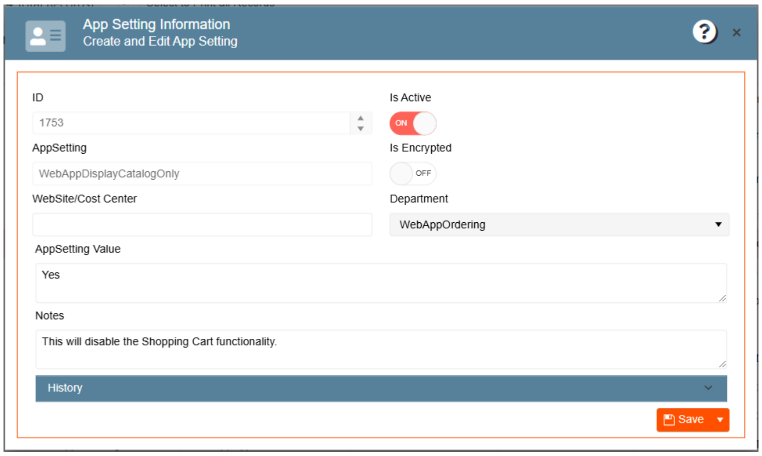


Setting as Catalog

Set this option to provide your customers with an online catalog, excluding the abilities of processing a payment or printing reports.

To set up as catalog go to:

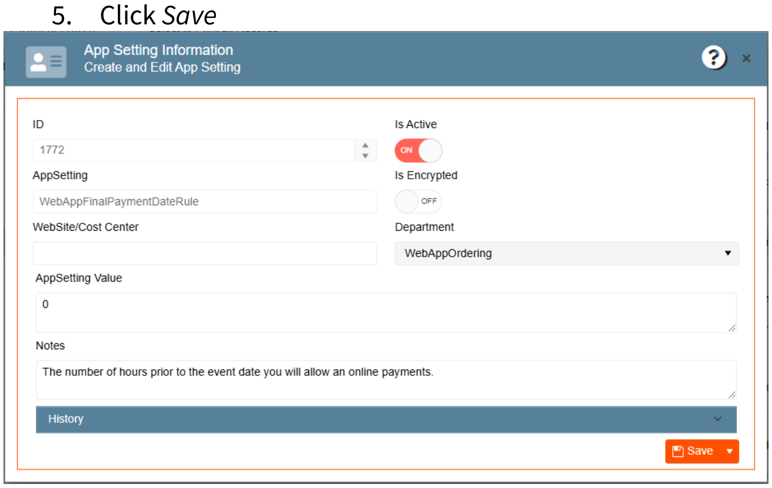
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “WebAppDisplayCatalogOnly” app setting
4. Set the App Setting value to *Yes*
5. Click *Save*



Setting Final Payment Date

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

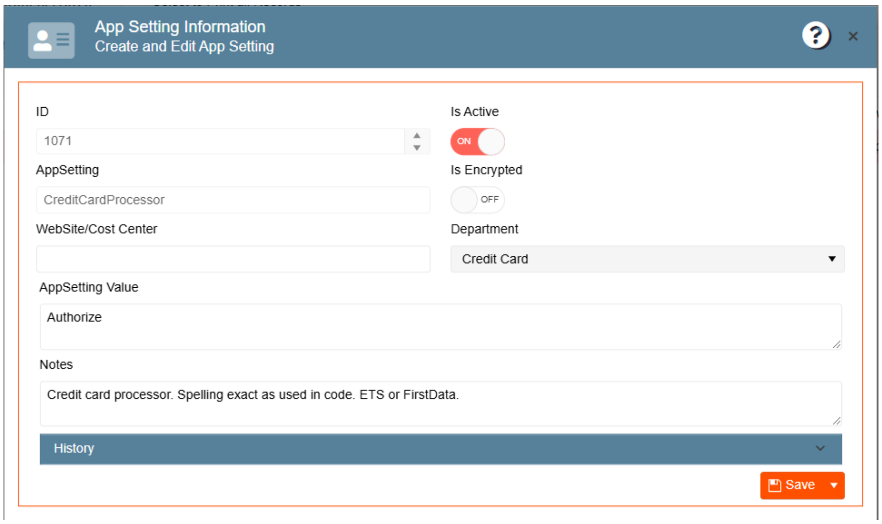
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “WebAppFinalPaymentDateRule” app setting
4. Set the App Setting value to *Yes*
5. Click *Save*



Setting Payment Gateway

To configure your credit card processor go to:

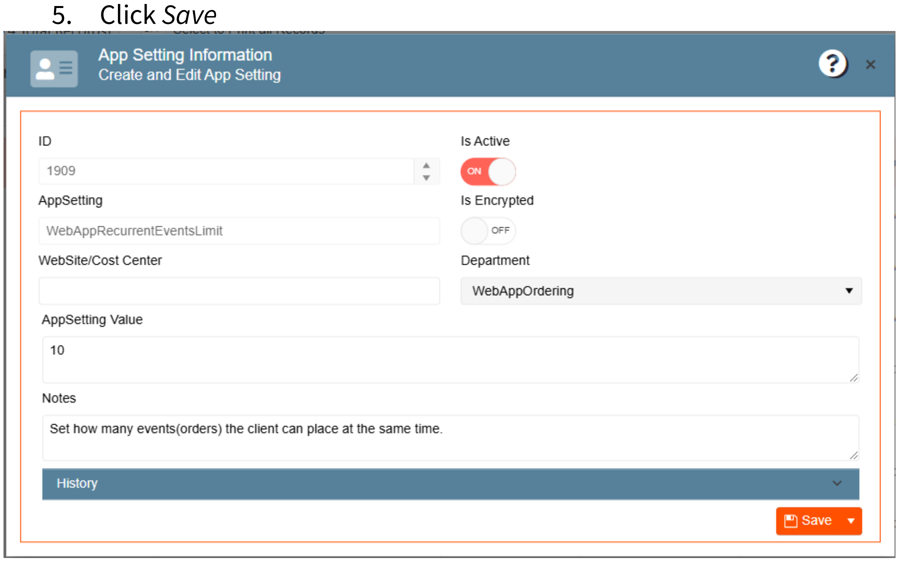
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the “CreditCardProcessor” app setting
4. Type in your credit card processor as used in code (OpenEdge or Authorize) in the app setting value
5. Click *Save*



Recurring events limit

Set a limit as to how much events a customer can place at the same time using the recurring orders with this app setting:

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

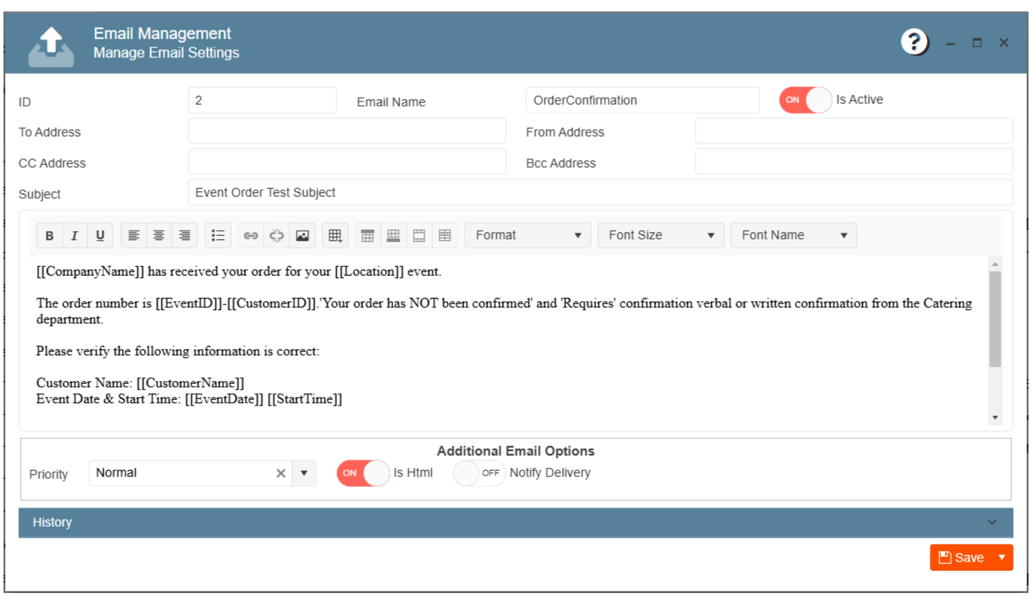
- Placing an order
- Confirming an order
- Canceling an order
- Making a payment
- Sending an invoice
- Crerating a change request
- A change request is approved
- A change request is rejected

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:

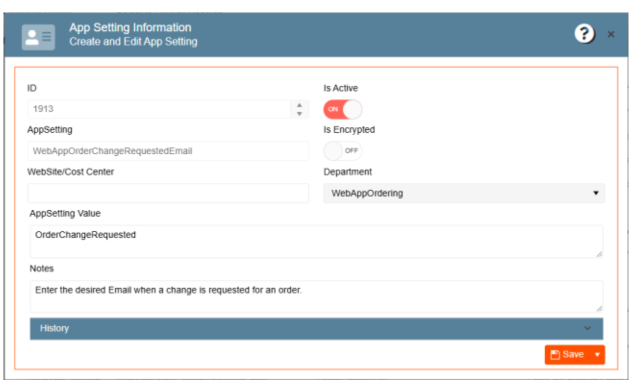
1. Navigate to the gear icon
2. Click on *App Settings*
3. Search for the app setting of the email you want to configure:
    - Placing an order - WebAppPendingEmail
    - Confirming an order - WebAppConfirmedEmail
    - Canceling an order - Webappcancelationemail
    - Making a payment - PaymentPortalEmailTemplate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