Elecāte™

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

User Manual

Shopping Cart & Portal

v 2: 11.20.2026



Contents

.....3

Shopping Cart Portal.....3

Prerequisites – Before You Begin 4

Business Settings 6

Business Rules 6

Configuring Locations for Delivery + Pick Up 7

Creating and Grouping Data Items 7

Creating a Web Group 7

Creating a Web Item 8

Setting Web Item Availability 9

Setting Partial-Day Closures.....10

Setting Customer Types to Correspond to the Web Portal 11

Admin Portal.....13

Accessing the Admin Portal 14

Adding/Changing the Banner.....14

Setting/Changing Theme Colors.....14

Adding/Changing the Logo.....14

Adding Contract Instructions 15

Category Settings.....15

General Settings 18

Shopping Cart Settings.....18

Setting the Default Referred By Value 18

Setting Default Customer Payment Terms.....19

Setting the Default Event Type.....20

Setting Default Order Status Values 21

Setting Up Idle Session Timeout.....22

Setting Up as a Payment Portal.....23

Setting Up as a Catalog 24

Setting the Final Payment Date 24

Setting the Payment Gateway.....25

Setting the Recurring Events Limit 25

Setting Email Confirmations 26
Pay as a Guest 28
Custom Gratuity 30
Configuring Footer Links 30
Configuring the Click-Through Contract 32
Setting Retail Price Display 33
Enabling New User Registration 34
Granting Existing Customers Portal Access 34
Managing Order History Columns 35
Enabling Credit Card Finance Charges 36
Accessing the Shopping Cart 37
Sign Up 37
Log In with Email and Password 38
Use Social Login 38
Selecting Event Date & Time 39
View Products 39
View Cart 40
Saving an Order 40
Processing a Payment 41
Reports 42
Upload/View Attachments 43
Accept/View Contract 43
Copy Order 44
Making Changes on an Existing Order 45
View Change Requests 45
Cancel Order 46
Favorites 46
..... **47**

Shopping Cart Portal



Prerequisites – Before You Begin

Before setting up the Shopping Cart, make sure the following configurations and requirements are completed in Empower and the Admin Portal. These prerequisites help ensure that the Shopping Cart is properly connected and ready to accept customer orders and payments.

Payment Gateway Configuration

- Ensure that a payment gateway has been contracted.
- Verify that the payment gateway has been configured and is ready to process transactions (see Setting the Payment Gateway).

Locations Setup

- Create all required locations in Empower.
- Verify that the locations needed for the Shopping Cart are available and properly configured.

Customer Types Setup

- Create the customer types required for the Shopping Cart in Empower.
- Verify that the appropriate customer types are available for customer registration and order management (see Setting Customer Types to Correspond to the Web Portal).

Event Types Setup

- Verify that the required Event Types have been created and configured in Empower.
- Ensure that the appropriate Event Types are available for use with the Shopping Cart (see Setting the Default Event Type).

Credit Card Convenience Fee Configuration

- Review and configure the credit card finance charge settings (see Enabling Credit Card Finance Charges).
- Verify that the applicable fee configuration is in place before enabling credit card payments.

Default Salesperson Configuration

- Assign a default Salesperson for Shopping Cart orders.
- Verify that the selected Salesperson is properly configured in Empower.

Email Configuration

The Shopping Cart sends automated notifications for order placements, confirmations, payments, change requests, and cancellations. Before go-live, configure your company's email (FROM address) and SMTP relay settings so these emails are delivered successfully.

Step 1 — Navigate to email settings

1. Click the gear icon in Elecate.
2. Select App Settings.

3. Search for [WebAppFromEmail] to set the FROM address customers will see.

Step 2 — Set the FROM address

1. Double-click the [WebAppFromEmail] app setting row.
2. Enter the email address that will appear as the sender (e.g., orders@yourcompany.com).
3. Ensure the toggle is set to Active.
4. Click Save.

Step 3 — Configure SMTP settings

1. Search for and configure the following SMTP app settings:

- SmtpHost — Enter the hostname or IP address of your SMTP server (e.g., smtp.office365.com).
- SmtpPort — Enter the SMTP port (typically 587 for TLS or 465 for SSL).
- SmtpUser — Enter the username or email address used to authenticate with the SMTP server.
- SmtpPassword — Enter the password for the SMTP user account.
- SmtpEnableSsl — Set to Yes to enable SSL/TLS encryption (recommended).

Step 4 — Verify email delivery

1. Place a test order on the Shopping Cart portal.
2. Confirm that the confirmation email is received at the customer's address.
3. Check that the FROM address and display name appear correctly.
4. If the email is not received, verify SMTP credentials and check spam/junk folders.

Note: Consult your IT or email administrator for the correct SMTP host, port, and authentication credentials.

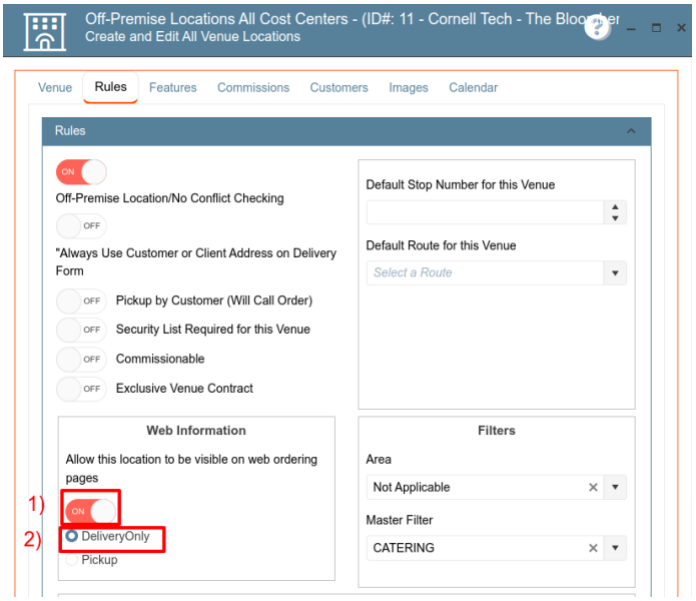
Business Settings

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 place orders, delivery and pickup locations must be enabled in Empower. This is done from Venue Management, and each scenario should be set up as shown below:



Creating and Grouping Data Items

For most projects, we will offer to import the data items and groups for you, including 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 for help.

Creating a Web Group

1. Select the correct unit from the top dropdown
2. Click 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.

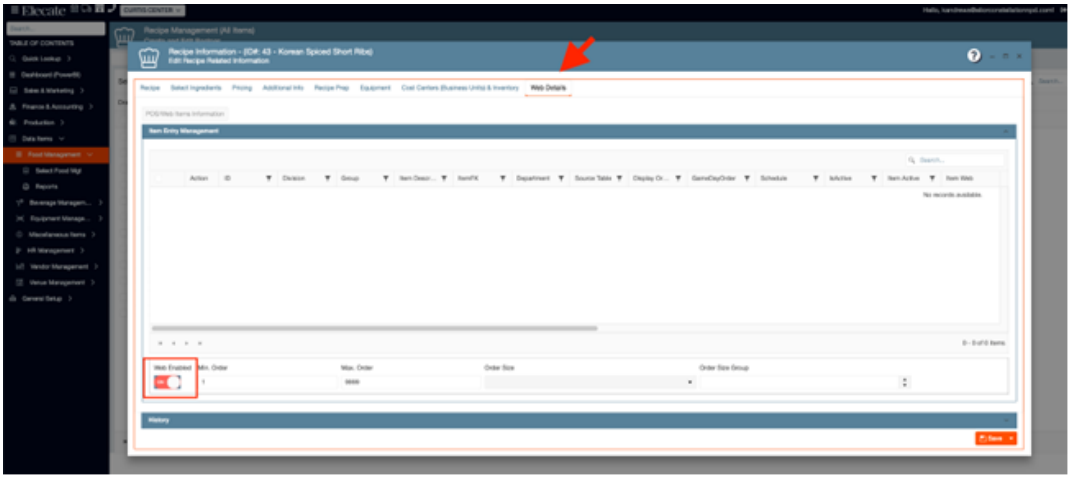
1. Data Items
2. Food Management
3. Recipe Group Manager
4. New
5. Create a new group. In this case, we'll create Snack. To properly order the Recipe Groups, follow the Group Code and Web Code structure we've set up.
6. Then, navigate to the Web/POS Setup tab and fill in the fields.

For more information, refer to this FAQ: https://faq.elecate.com/faq/recipe-grouping-and-display-logic

Note: The Web Group will not appear in 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 as usual by following these steps:
   a. Data Items
   b. Food Management
   c. Recipe Management (All Items)
   d. New Entry, then complete all required fields and click Save
3. Go to the Web Details tab
   a. Toggle Web Enabled to On



4. Click the gear icon and 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 for recipes, or Menu for packages.
      ii. Source Table
         - Select Recipe for recipes, or Menu for packages.
      iii. Web Division
         - Select the Web Division.
      iv. Web Group
         - Select the same sub-group as the data item.
      v. Item

- Select the item from the dropdown list. Only items with Web Enabled turned on at the data item level appear in this list.

vi. Display Order
- Enter a number for the order in which you want the items to display.

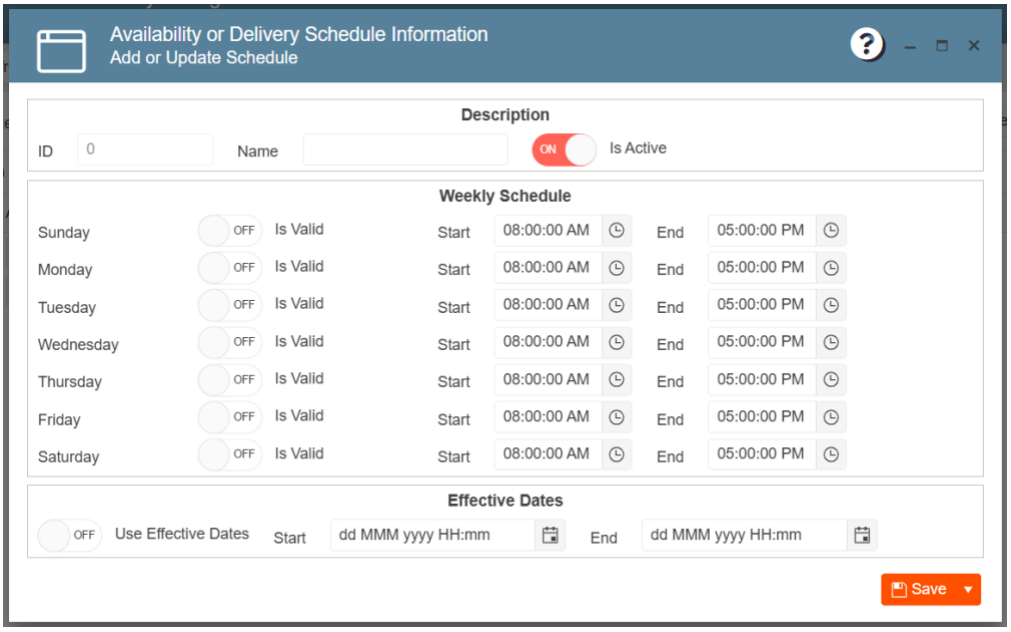
vii. Schedule
- Optional. Select an Online Ordering Schedule to control when the item is available (see Setting Web Item Availability).

For more information, refer to this FAQ: https://faq.elecate.com/faq/creating-a-web-item-for-the-shopping-cart

Setting Web Item Availability

Web item availability is also called the Online Ordering Schedule. For this feature to work, the [UseDeliveryDateTimeForWebItems] app setting must be set to "Yes." Otherwise, the system ignores all schedules, even active ones.

1. Click the gear icon
2. Click POS Web Item Management
3. Click Item Availability Management
4. Click New Entry
5. Set up the desired schedule
6. Enter the schedule name
7. Click Save



For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-a-web-item-availability-for-the-shopping-cart

Setting Partial-Day Closures

Partial-day closures prevent customers from placing orders during the selected schedule. The web portal shows a customizable pop-up message during the closure.

For this feature to work, the [UseDeliveryDateTimeForWebItems] must be set to “Yes.” Otherwise, the system ignores all schedules, even active ones.

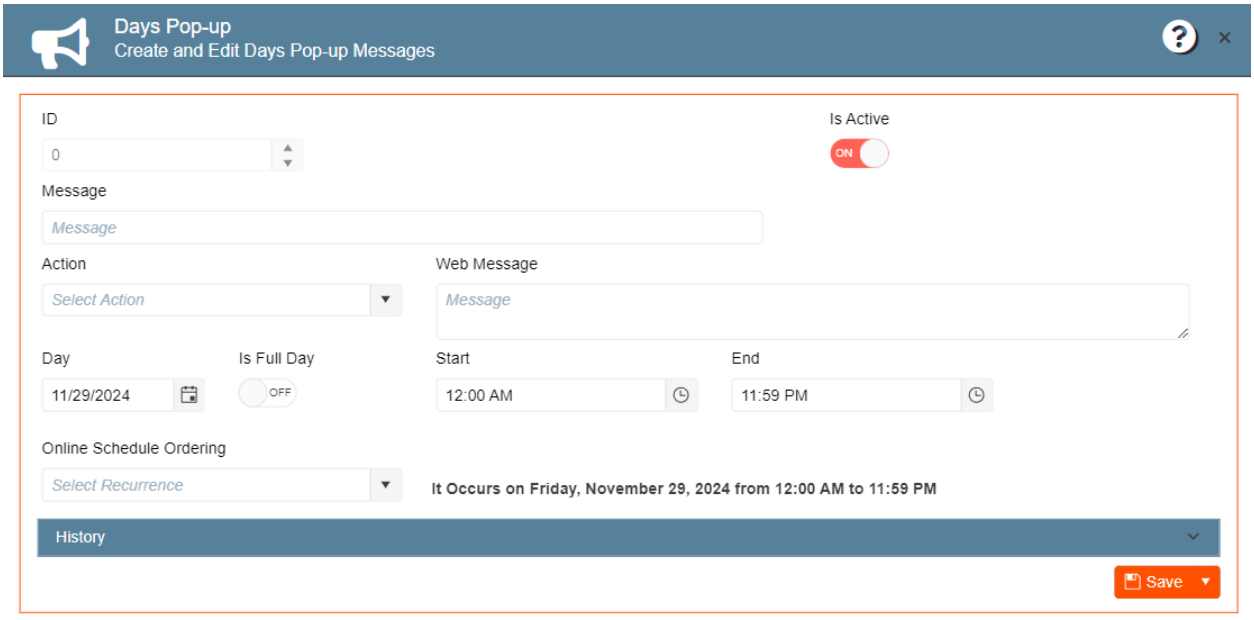
1. Open the General Setup side menu
2. Select the Marketing module
3. Select Create and Edit Days Pop-up Messages
4. Click New Entry

    For a one-time message:

    a. Enter the message name in the Message field. This is the message title.
    b. Enter the Web Message. This is the message content.
    c. Select the date in the Day field
    d. Turn off the Is Full Day toggle
    e. Select the Start and End times
    f. Click Save

    For a recurring message:

    a. Enter the message name in the Message field. This is the message title.
    b. Enter the Web Message. This is the message content.
    c. In the Online Schedule Ordering field, select a web item availability schedule.
    d. Click Save.



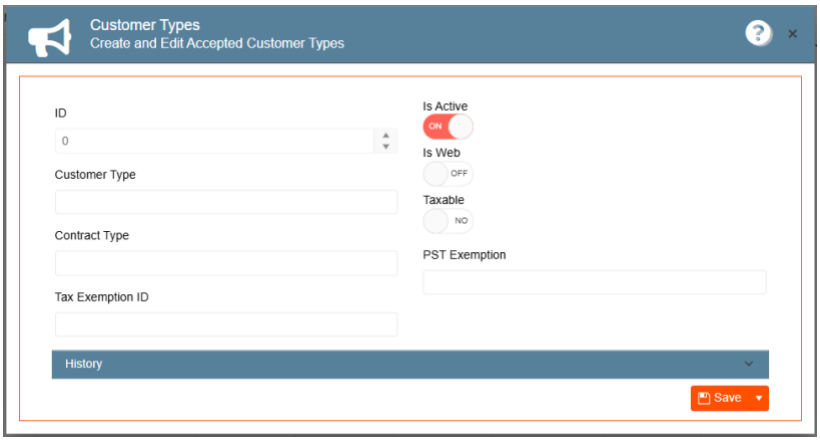
For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-partial-day-closures-for-the-shopping-cart-

Setting Customer Types to Correspond to the Web Portal

As part of the initial setup, a customer type for the web portal must be created and assigned to the [WebAppDefaultCustomerType] app setting. This brand-level configuration prevents issues during a user's initial registration.

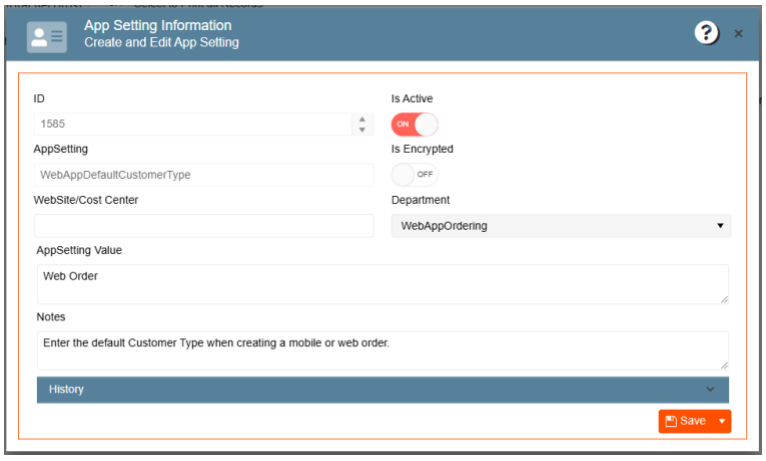
To create a customer type:

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 New Entry
5. To edit an existing customer type, click the pencil icon or double-click the customer type row
6. Fill in the customer type information
7. Click *Save*



To set the default customer type:

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



For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-customer-types-to-correspond-to-the-web-portal-for-the-shopping-cart

Admin Portal



Accessing the Admin Portal

To access the Admin Portal, log in to the Shopping Cart with an admin user account. The banner, theme colors, and logo are all set on the Domain Settings screen.

Adding/Changing the Banner

To add or change the current banner:

1. Log in to the Shopping Cart with an admin user
2. Go to Domain Settings
3. Paste the image URL in the Background Image URL field
4. Click *Save*

Setting/Changing Theme Colors

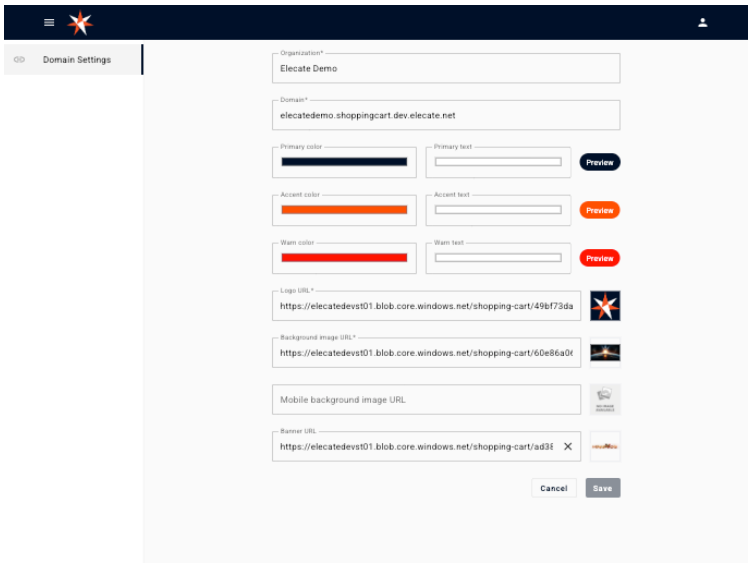
To add or change the theme colors:

1. Log in to the Shopping Cart with an admin user
2. Go to Domain Settings
3. Select the Primary, Accent, and Warn colors
4. Select the text color for each, and click Preview to check it
5. Click *Save.*

Adding/Changing the Logo

To add or change the current logo:

1. Log in to the Shopping Cart with an admin user
2. Go to Domain Settings
3. Paste the image URL in the Logo URL field
4. Click *Save*



Adding Contract Instructions

The Contract Instructions field allows administrators to configure the instructions displayed to customers on the event when a contract requires additional instructions.

To add or update the Contract Instructions:

- Log in to the Admin Portal with an admin user.
- Navigate to Domain Settings.
- Locate the Contract Instructions field.
- Enter or update the instructions that should be displayed to customers.
- Click Save.

The configured instructions will be displayed to the customer on the event page under Contract Instructions.

Category Settings

The Category Settings section allows administrators to customize the way departments and product categories are displayed in the Shopping Cart.

Administrators can:

- Merge or unmerge Food Groups to control how individual recipes and packages are grouped into categories.
- Change the department display name shown to customers in the Shopping Cart.

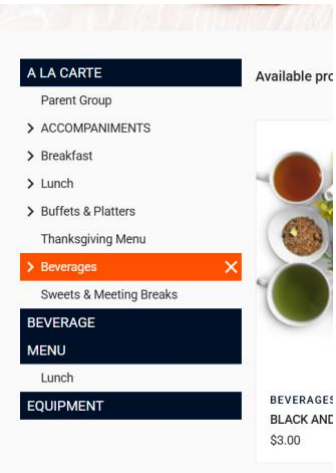
Merging Food Groups

The Merge Food Groups option allows individual recipe and package categories to be combined under the same department.

To merge Food Groups:

- Log in to the Admin Portal with an admin user.
- Navigate to Category Settings.
- Locate the department you want to configure.
- Enable the Merge Food Groups option.
- Click Save.

When Food Groups are merged, the individual recipe and package categories are displayed together under the corresponding department in the Shopping Cart.



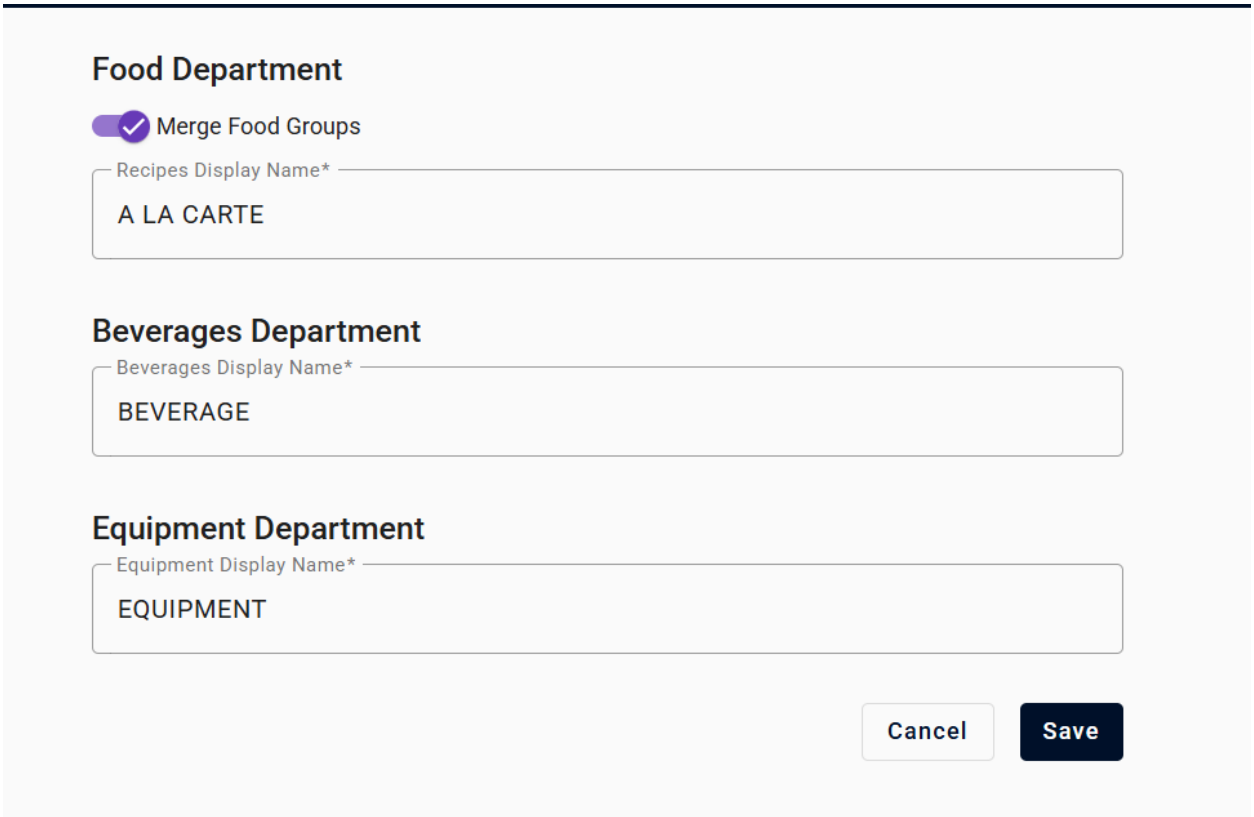
Changing a Department Display Name

The department name displayed to customers can be customized from Category Settings.

To change a department display name:

- Log in to the Admin Portal with an admin user.
- Navigate to Category Settings.
- Locate the department you want to rename.
- Enter the desired name in the corresponding Display Name field.
- Click Save.

The updated name will be displayed as the department name in the Shopping Cart.



For more information about the Admin Portal, refer to this FAQ: https://faq.elecate.com/faq/how-to-access-to-the-admin-portal

General Settings

Shopping Cart Settings

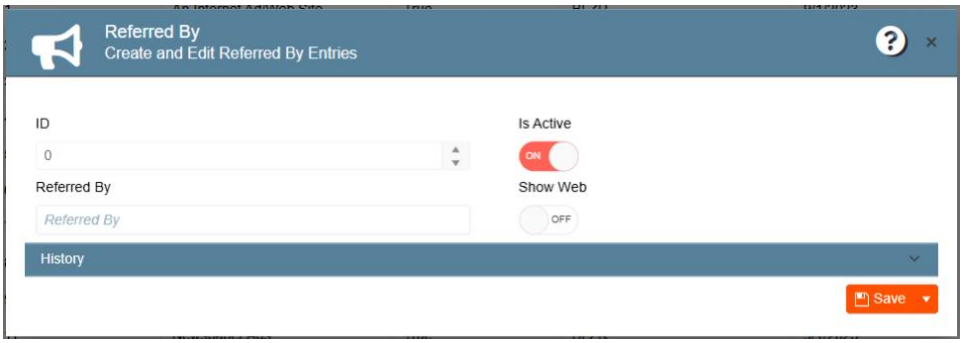
For the Shopping Cart to work correctly, the web order defaults must be created and assigned to their app settings.

Setting the Default Referred by Value

To create the default Referred By value for web orders:

1. From the General Setup menu, open the Marketing module
2. Select Create and Edit Referred By Entries
3. Click *New Entry*
4. Type the default value
5. Turn on the “Is Active” and “Show Web” toggles

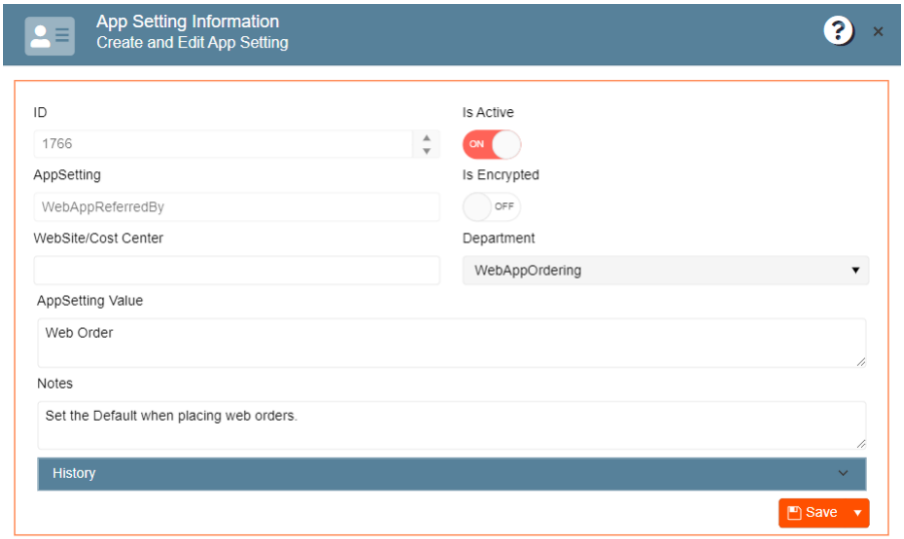
6. Click Save



Assigning the Default Referred by Value

1. Click the gear icon
2. Go to *App Settings*
3. Search for [WebAppReferredBy]
4. Enter the value you created for web orders
5. Click *Save*

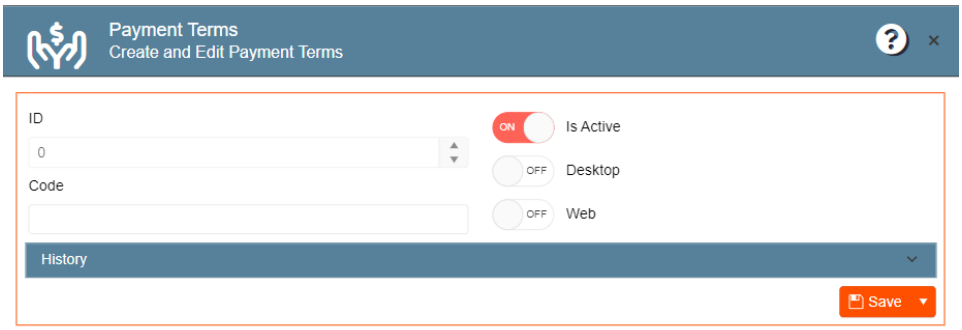
All new web orders will have this default value.



Setting Default Customer Payment Terms

To create or edit a customer payment terms value:

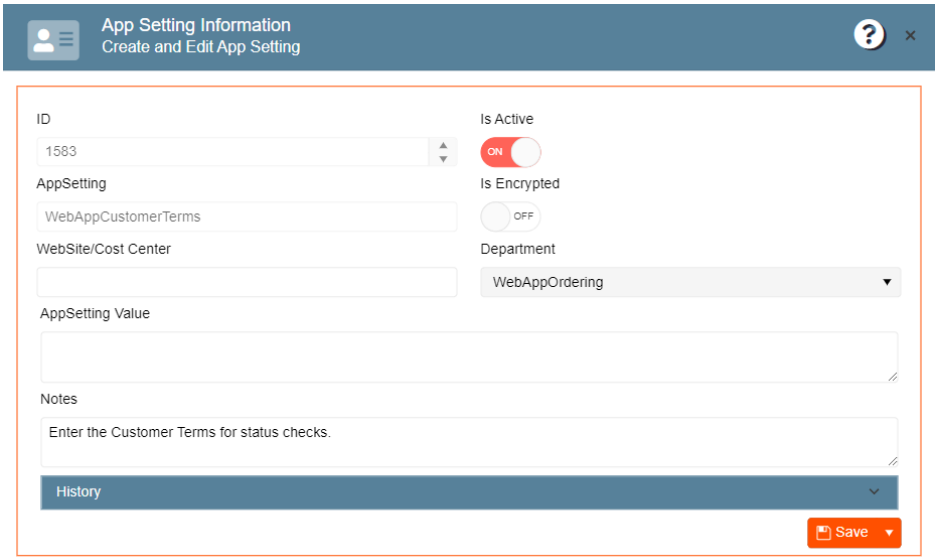
1. Click the gear icon
2. Click Financial Setup
3. Select Create and Edit Payment Terms
4. Click *New Entry*
5. Type the new code
6. Click *Save*



Assigning the Default Payment Terms

1. Click the gear icon
2. Go to *App Settings*
3. Search for the [WebAppCustomerTerms] app setting
4. Enter the value you created for web orders.
5. Click *Save*

Any existing customer payment terms value can be entered in this app setting. All new web orders will use this default value.



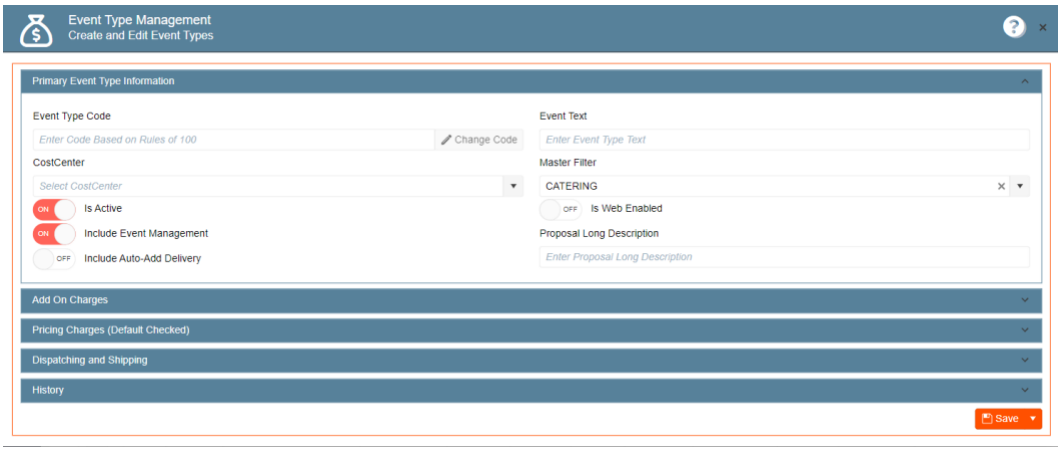
For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-default-customer-payment-terms-for-the-shopping-cart

Setting the Default Event Type

To create an event type value:

1. Click the gear icon
2. Click Financial Setup
3. Select Create and Edit Event Types
4. Click *New Entry*
5. Enter the Event Type Code
6. Enter the Event Text

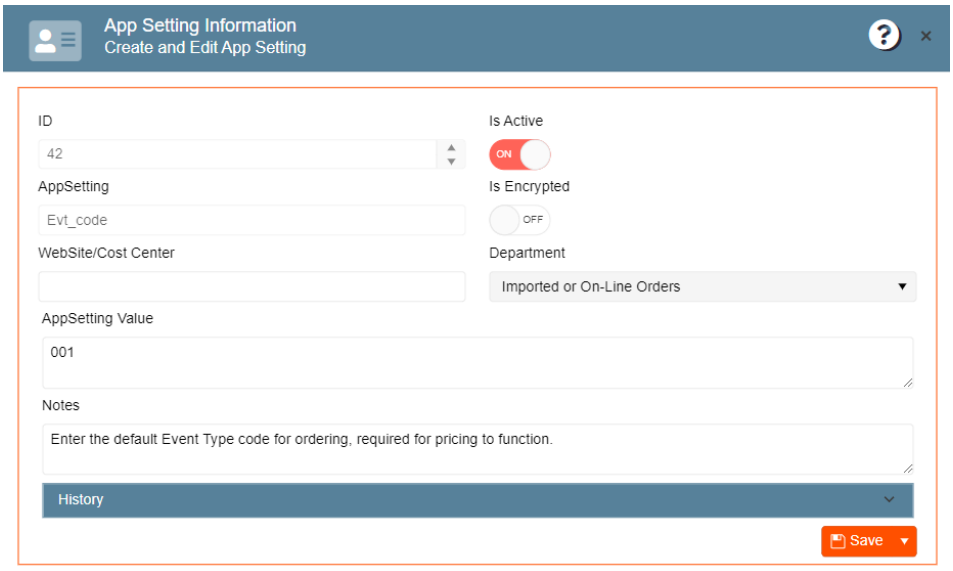
7. Select a cost center from the dropdown
8. Click *Save*



Assigning the Default Event Type

1. Click the gear icon
2. Go to *App Settings*
3. Search for the "Evt_code" app setting
4. Enter the value you created. This must be the Event Type Code.
5. Click *Save*

Any existing event type can be entered in this app setting. All new web orders will use this default value.



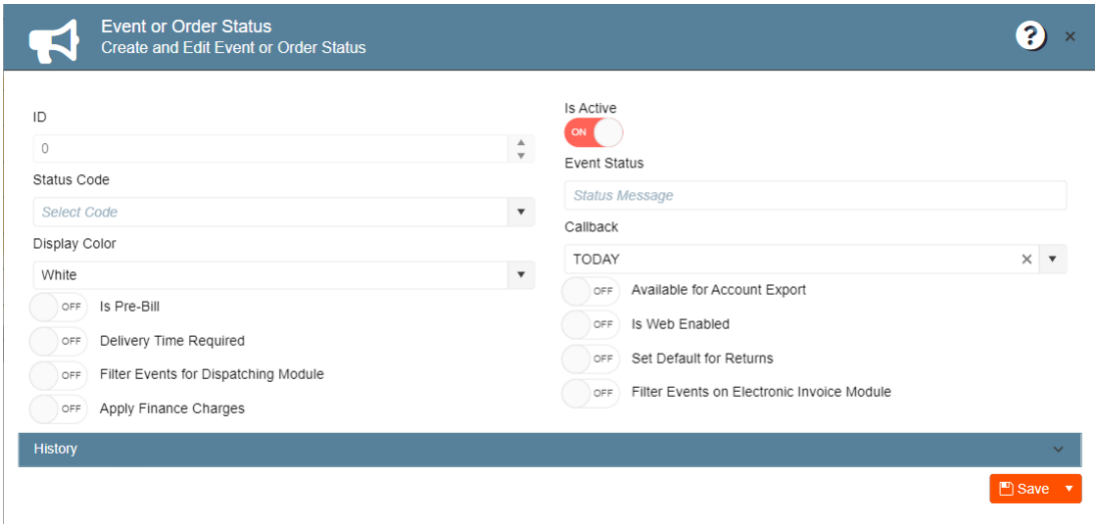
For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-default-event-type-for-the-shopping-cart-

Setting Default Order Status Values

To create an order status value:

1. Click the gear icon
2. Click Financial Setup
3. Select *Create and Edit Event or Order Status*

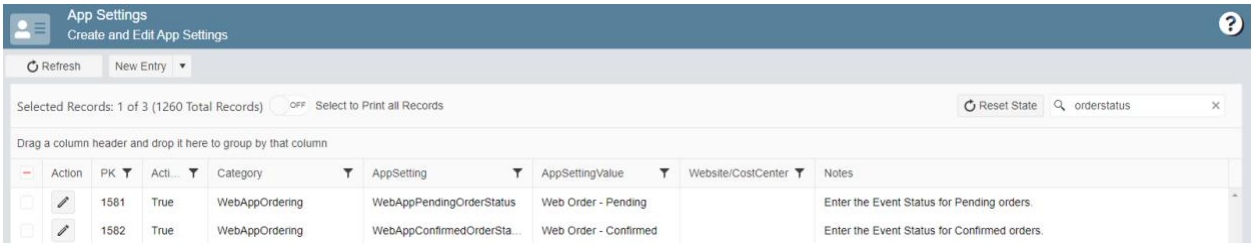
4. Click *New Entry*
5. Enter the Event Status
6. Enter the Status Code
7. Click *Save*



Assigning the Default Order Statuses

1. Click the gear icon
2. Click *App Settings*
3. Search for the following app settings:
   a. [WebAppPendingOrderStatus]
   b. [WebAppConfirmedOrderStatus]
4. Enter the desired value for each app setting. This must be the Event Status.
5. Click *Save*

Any existing order status can be entered in these app settings. All new web orders will use these default values.

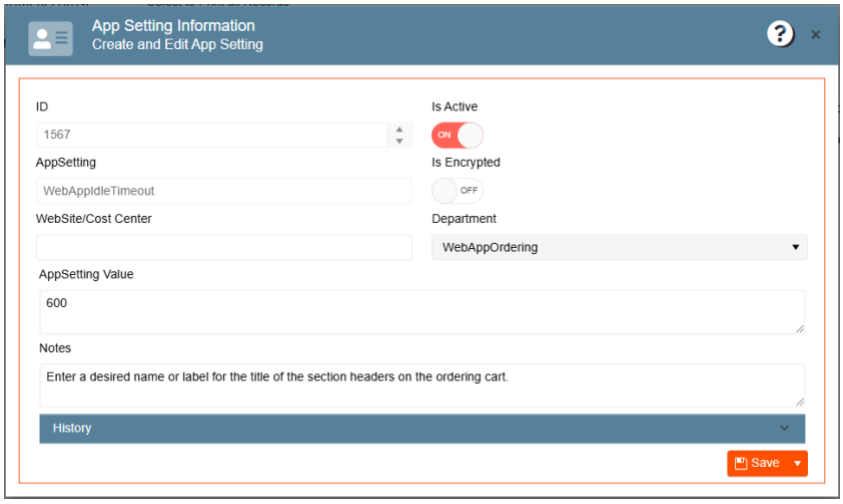


Setting Up Idle Session Timeout

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

To set up the idle session timeout:

1. Click the gear icon
2. Click *App Settings*
3. Search for the [WebAppIdleTimeout] app setting
4. Enter the amount of time in seconds in the App Setting Value field (for example, 1800 for 30 minutes)
5. Click *Save*



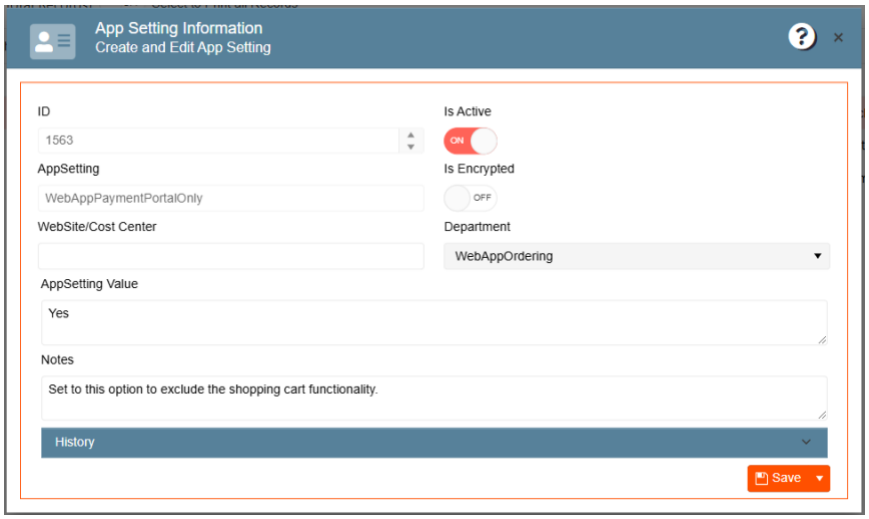
For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-up-idle-session-timeout-for-the-shopping-cart

Setting Up as a Payment Portal

Set this option to give your customers the payment portal without the shopping cart functionality.

To set up as a payment portal:

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



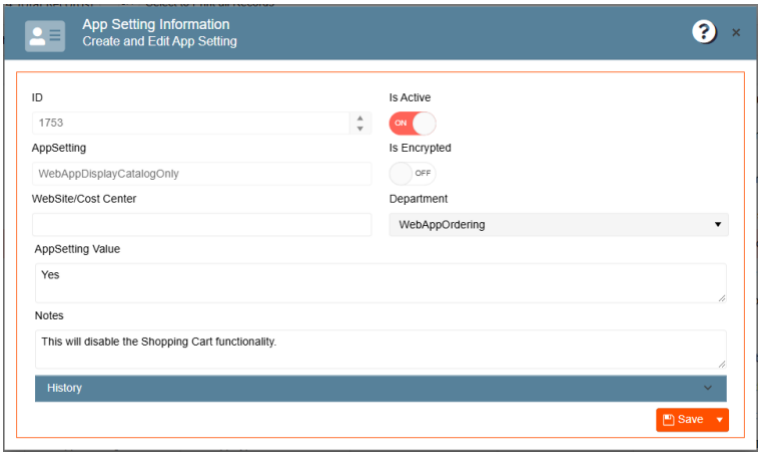
For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-as-payment-portal-

Setting Up as a Catalog

Set this option to give your customers an online catalog without the ability to process payments or print reports.

To set up as a catalog:

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

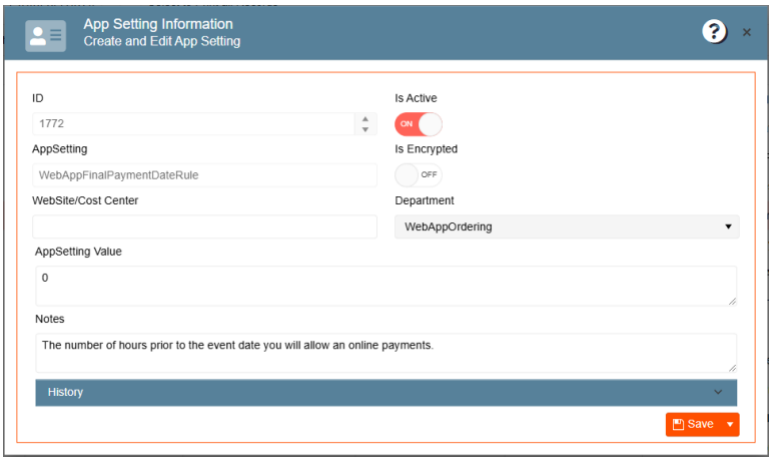


For more information, refer to this FAQ: https://faq.elecate.com/faq/setting-as-catalog

Setting the Final Payment Date

To set how many hours before the event online payments are still accepted:

1. Click the gear icon
2. Click *App Settings*
3. Search for the [WebAppFinalPaymentDateRule] app setting
4. Set the App Setting Value to the number of hours before the event that payments are still allowed. For example, enter 48 to allow payments until 2 days before the event.
5. Click *Save*

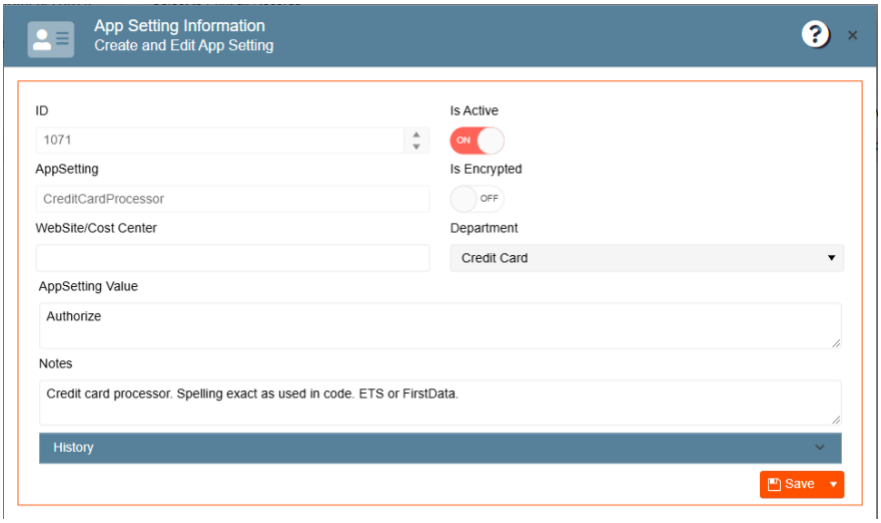


Note: Setting any number of hours in this app setting also disables payments after the event.

Setting the Payment Gateway

To configure your credit card processor:

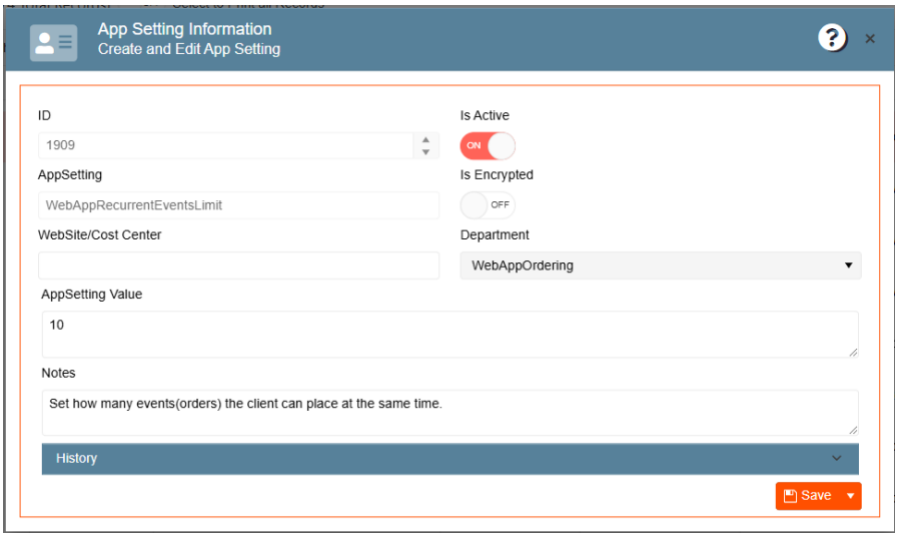
1. Click the gear icon
2. Click *App Settings*
3. Search for the [CreditCardProcessor] app setting
4. Enter your credit card processor in the App Setting Value field: Elavon, GroupISO, OpenEdge, or Authorize.net.
5. Click *Save*



Setting the Recurring Events Limit

Use this app setting to limit how many events a customer can place at one time with recurring orders:

1. Click the gear icon
2. Click *App Settings*
3. Search for the [WebAppRecurrentEventsLimit] app setting
4. Set the App Setting Value to the maximum number of recurring events.
5. Click *Save*



For more information, refer to this FAQ: https://faq.elecate.com/faq/recurring-events-limit

Setting Email Confirmations

Email confirmations reassure customers that their request was processed correctly and give them a written record of the transaction for future reference.

You can configure confirmations for these actions:

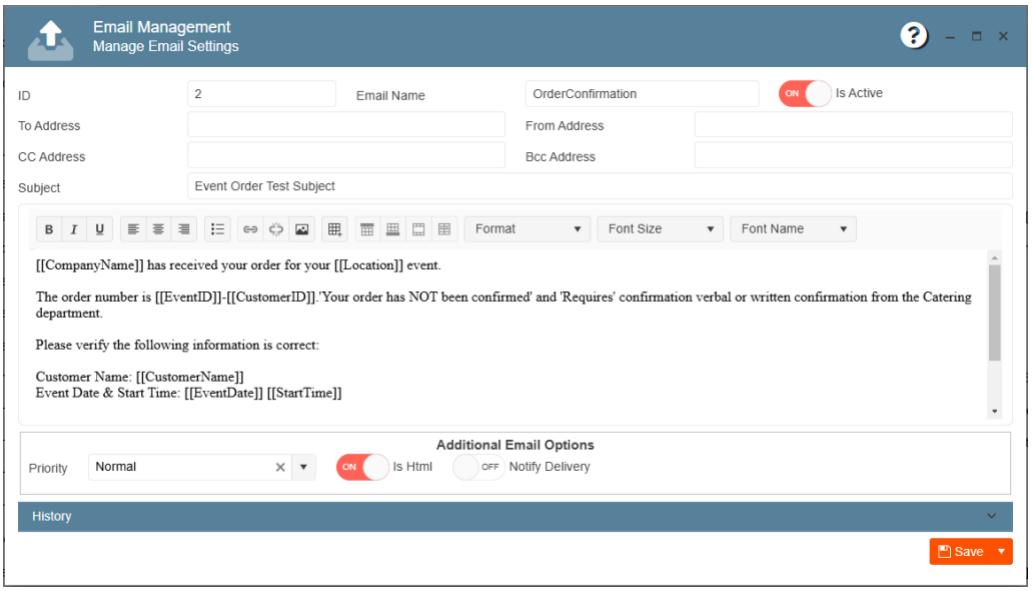
- Placing an order
- Confirming an order
- Canceling an order
- Making a payment
- Sending an invoice
- Creating a change request
- A change request is approved
- A change request is rejected

Setting up email confirmations takes two steps: first create the template, then assign it in the app settings.

To create a template:

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

Note: The double square brackets (“[[xxx]]”) are placeholders that the system fills in automatically. You can move these placeholders anywhere in the template, but if you remove the brackets, the information will not be populated.



To assign the templates in the app settings:

1. Click the gear icon
2. Click *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 the pencil icon or double-click the app setting row to edit it
5. Type the template name in the App Setting Value field
6. Click Save

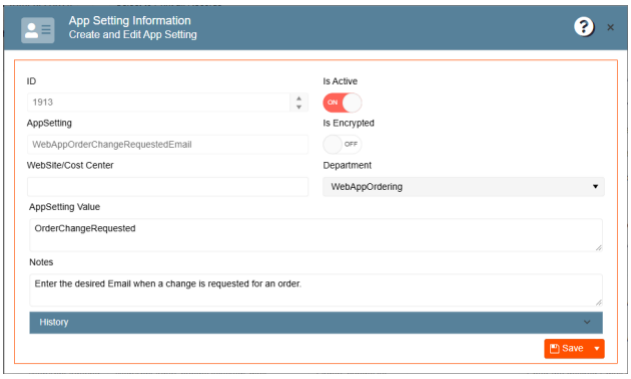
The following emails can include reports:

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

To attach a report to one of these emails:

1. Click the gear icon
2. Click *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 the pencil icon or double-click the app setting row to edit it

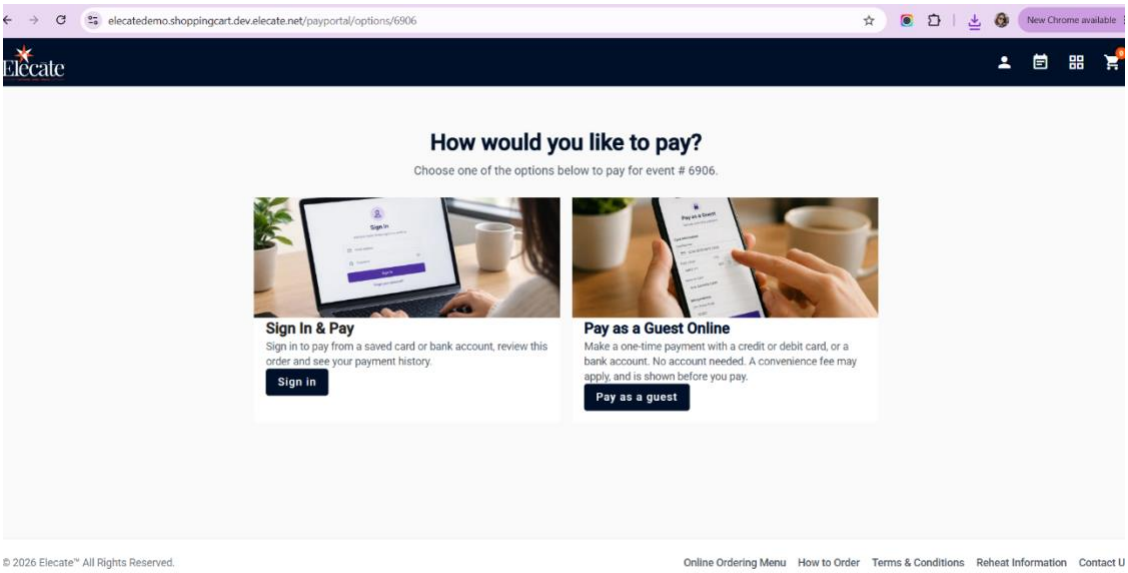
5. Type the report name in the App Setting Value field
6. Click Save



Note: App settings left blank have no effect, even when active.

Pay as a Guest

The Pay as a Guest option allows customers to make payments through the Payment Portal without requiring them to create or log in to an account.



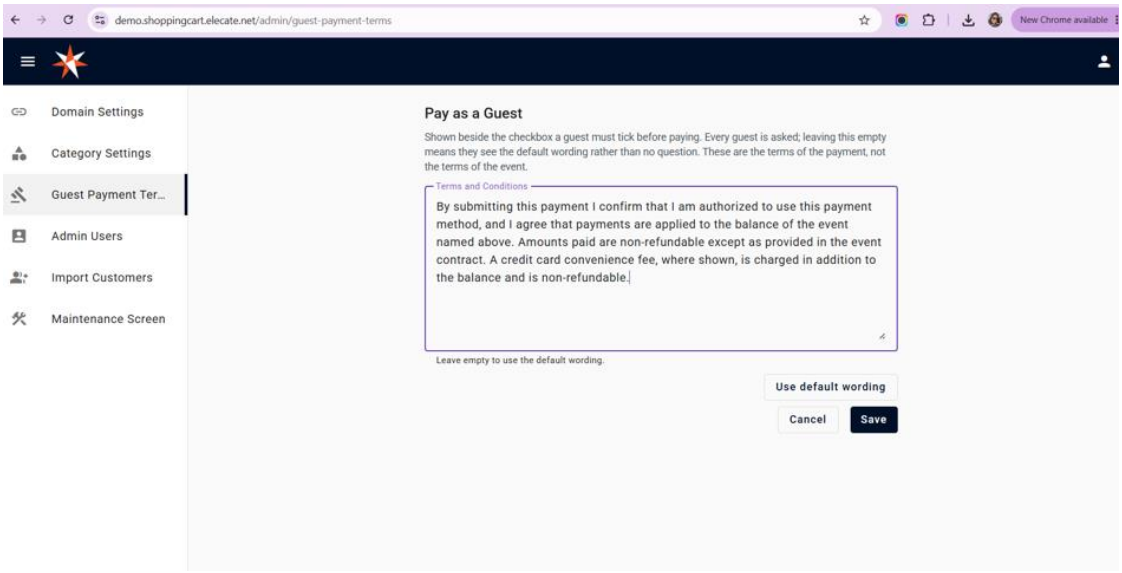
To enable the Pay as a Guest option:

- Click the gear icon, then click App Settings.
- Search for the [WebShowGuestLoginButton] app setting.
- Set the App Setting Value to Guest.

- Click Save.

Configuring Terms and Conditions

The Terms and Conditions displayed to customers using Pay as a Guest can be updated from the Admin Portal.



To update the Terms and Conditions:

- Log in to the Admin Portal.
- Locate the Terms and Conditions configuration.
- Update the Terms and Conditions as needed.
- Click Save.

Payment Portal Configuration

Additional Pay as a Guest functionality is controlled through the existing Payment Portal / Shopping Cart configuration, including:

- Credit Card payments
- ACH payments
- ACH time rules
- Theme colors
- Partial payments
- Gratuity configuration
- Reports

These configurations determine the payment options and information available to customers when using the Payment Portal.

For more information, refer to this FAQ: https://faq.elecate.com/faq/pay-as-a-guest-feature

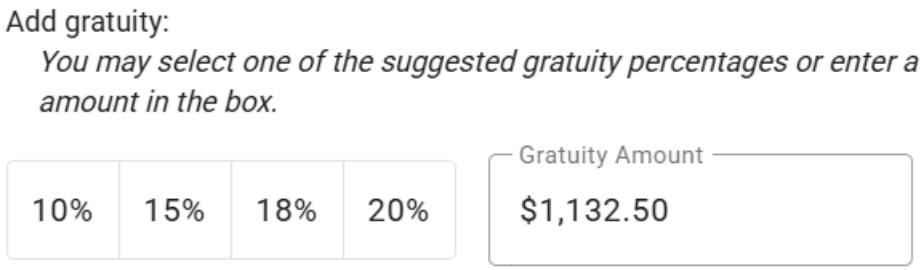
Custom Gratuity

The Custom Gratuity feature allows customers to select a suggested gratuity percentage or enter a custom gratuity amount when placing an order through the Shopping Cart or Payment Portal.

The Custom Gratuity feature is controlled through the following app settings:

- [GratuityMiscPk] – Enter the Miscellaneous Item ID that will be used for the custom gratuity charge.
- [WebAppCustomGratuityPercentages] – Enter the suggested gratuity percentages, separated by commas.
- [WebAppShowCustomGratuity] – Set this value to Yes to display the custom gratuity option to customers.

For example, the following configuration will display 10%, 15%, 18%, and 20% as suggested gratuity options:



When Custom Gratuity is enabled, customers will see the Add gratuity section during checkout.

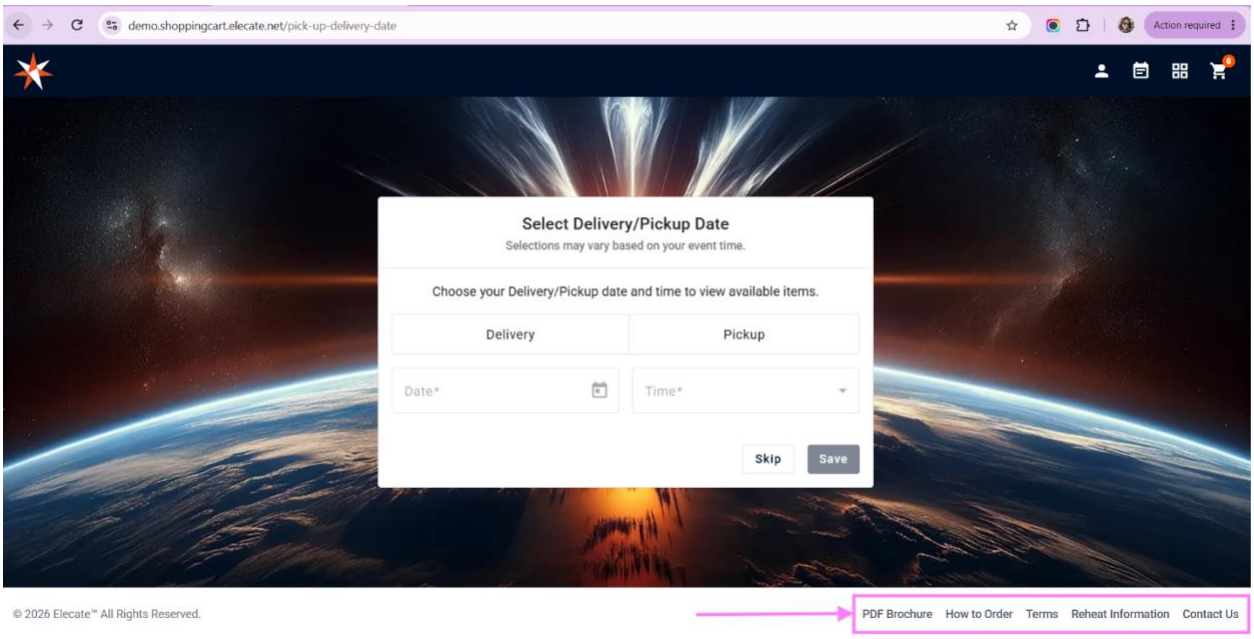
Customers can:

- Select one of the suggested gratuity percentages.
- Review the calculated Gratuity Amount.
- Alternatively, enter a custom gratuity amount in the Gratuity Amount field.
- Continue with the checkout process.

The selected gratuity will be added to the order total and displayed as a separate Gratuity amount.

Configuring Footer Links

The Shopping Cart footer supports up to four configurable links displayed at the bottom of the page. Each link can be configured with a custom label and can direct customers to a PDF document or a URL.



Each footer link is controlled by four app settings:

- **Link: Specifies the file reference or URL associated with the footer link.**
- **Enable/Disable: Determines whether the footer link is displayed.**
- **Label: Defines the text displayed to customers.**
- **Link Type: Specifies whether the destination is a PDF document or a URL.**

Setting Up a Footer Link

To configure a footer link:

1. Click the gear icon, then click **App Settings**.
2. Locate the four app settings for the footer link you want to configure (see the table below).
3. Set the Label app setting to the text customers should see.
4. Set the **Enable/Disable** app setting to Yes to display the link or No to hide it.
5. Set the Link Type app setting to PDF or URL.
6. In the Link app setting, enter the document reference (for a PDF) or the full web address (for a URL).
7. Click Save.

Repeat these steps for each footer link you want to configure.

Footer Link App Settings

The following table lists the app settings for each footer link.

Footer Link	Link Setting	Enable/Disable Setting	Label Setting	Link Type Setting

Brochure	WebAppBrochure	WebAppShowPDFBrochureLink	WebAppShowPDFLabel	WebAppShowPDFBrochureLinkType
Privacy	WebAppPrivacy	WebAppShowPrivacyLink	WebAppShowPrivacyLabel	WebAppShowPrivacyLinkType
Terms	WebAppTerms	WebAppShowTermsLink	WebAppShowTermsLabel	WebAppShowTermsLinkType
Refund	WebAppRefund	WebAppShowRefundLink	WebAppShowRefundLabel	WebAppShowRefundLinkType

Example: Configuring the PDF Brochure Link

The following example shows how the PDF Brochure footer link is configured:

App Setting	Example Value	Description
[WebAppBrochure]	1964	Specifies the brochure document reference.
[WebAppShowPDFBrochureLink]	Yes	Enables the footer link.
[WebAppShowPDFLabel]	PDF Brochure	Defines the label displayed to customers.
[WebAppShowPDFBrochureLinkType]	PDF	Specifies that the destination is a PDF document.

When configured this way, customers see **PDF Brochure** in the footer and can access the associated document.

For a web link, set the Link Type setting to URL and enter the full web address in the corresponding Link setting.

Configuring the Click-Through Contract

The Click-Through Contract feature allows customers to view and accept a contract through the Shopping Cart or Payment Portal. The contract can be configured to appear for pending and confirmed events, and administrators can specify the event status applied after the contract is accepted.

Configuring the Contract App Settings

The following app settings control the Click-Through Contract functionality:

App Setting	Example Value	Description
WebAppClickThroughContractPK	1928	Specifies the contract document reference.
WebAppClickThroughReportName	elecate_MasterMultiPage	Specifies the report name used to generate the contract document.

WebAppRequireContractForPayment	No	Determines whether contract acceptance is required for payment.
WebAppClickThroughType	PDF	Specifies the contract document type.
WebAppDisplayPendingClickThrough	Yes	Enables the contract display for pending events.
WebAppDisplayConfirmedClickThrough	Yes	Enables the contract display for confirmed events.
WebAppClickThroughConfirmEventStatus	Confirmed	Specifies the event status applied after the contract is accepted.

Setting Up the Click-Through Contract

To configure the Click-Through Contract:

1. Click the gear icon, then click **App Settings**.
2. Locate the app settings listed in the table above.
3. Set [WebAppClickThroughContractPK] to the appropriate contract document reference.
4. Set [WebAppClickThroughReportName] to the report used to generate the contract.
5. Set [WebAppClickThroughType] to the document type (for example, PDF).
6. Set [WebAppDisplayPendingClickThrough] and [WebAppDisplayConfirmedClickThrough] to Yes or No, depending on whether the contract should be displayed for pending and confirmed events.
7. Configure [WebAppRequireContractForPayment] according to whether contract acceptance must be completed before payment.
8. Set [WebAppClickThroughConfirmEventStatus] to the event status that should apply after the customer accepts the contract.
9. Click Save.

Contract Display and Acceptance

The contract displays settings determine whether customers can access the Click-Through Contract for pending or confirmed events. The requirement setting controls whether contract acceptance is mandatory for payment.

After the customer accepts the contract, the event status is updated according to the value configured in [WebAppClickThroughConfirmEventStatus].

Setting Retail Price Display

The [WebAppShowRetailPrices] app setting controls the display of retail prices in the Shopping Cart.

To configure retail price display:

1. Click the gear icon, then click **App Settings**.

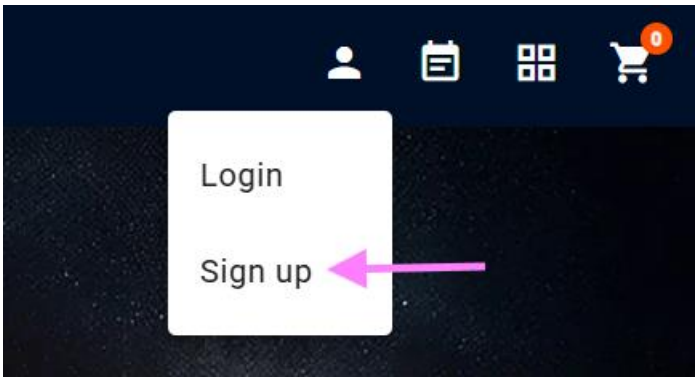
2. Search for [WebAppShowRetailPrices].
3. Set the value to Yes to display retail prices, or No to hide them.
4. Click Save.

Enabling New User Registration

The [WebAppShowNewUserButton] app setting controls whether the New User button is displayed in the Shopping Cart.

To configure the New User button:

1. Click the gear icon, then click **App Settings**.
2. Search for [WebAppShowNewUserButton].
3. Set the value to Yes to show the New User button, or No to hide it.
4. Click Save.



Granting Existing Customers Portal Access

There are two ways an existing customer can be given access to the Shopping Cart portal: an administrator can enable access from within Empower (the core system), or the customer can self-register directly from the portal using the Sign-Up option.

Method 1 — Enabling Access from Empower (Core)

An administrator can grant a customer portal access directly from the customer record in Empower, with no additional setup.

- Open the customer record in Empower.
- Locate the portal access toggle and enable it.
- Save the record.

Once the toggle is enabled, the customer must go to the Shopping Cart portal and reset their password before they can log in. Portal users created from the core do not have a password automatically assigned — the customer initiates a password reset from the portal login screen to complete their account setup.

Method 2 — Customer Self-Registration from the Portal

If the [WebAppShowNewUserButton] app setting is enabled, customers can register themselves directly from the Shopping Cart portal without any administrator action. See “Enabling New User Registration” above for configuration steps.

Password Behavior and Security

The following password rules apply to portal accounts:

- Portal passwords are independent of Empower core passwords. The password field visible in the customer record inside Empower is used for the mobile app only — it is not synchronized with the Shopping Cart portal password.
- There is no mechanism for an administrator to set or view a customer’s portal password from any screen in Empower or the Admin Portal. This is by design: payment processors require that only the account holder can authorize payments, so no staff member can access a customer’s portal account to process a payment on their behalf.
- Customers set or reset their own portal password directly from the portal login screen using the “Forgot Password” flow.

No Additional Setup Required

Granting portal access with the Empower toggle requires no additional setup by the Elecate team. Access is provisioned entirely within Empower.

Managing Order History Columns

Administrators can control which columns are displayed in the Order History section of the Shopping Cart. This is managed through two app settings:

Displaying the Status Column

App Setting: [WebAppShowStatusColumn]

This setting controls whether the Status column is displayed in the Order History table.

To configure this setting:

1. Click the gear icon, then click **App Settings**.
2. Search for [WebAppShowStatusColumn].
3. Set the value to:
    a. Yes – Displays the Status column in Order History.
    b. No – Hides the Status column from Order History.
4. Click Save.

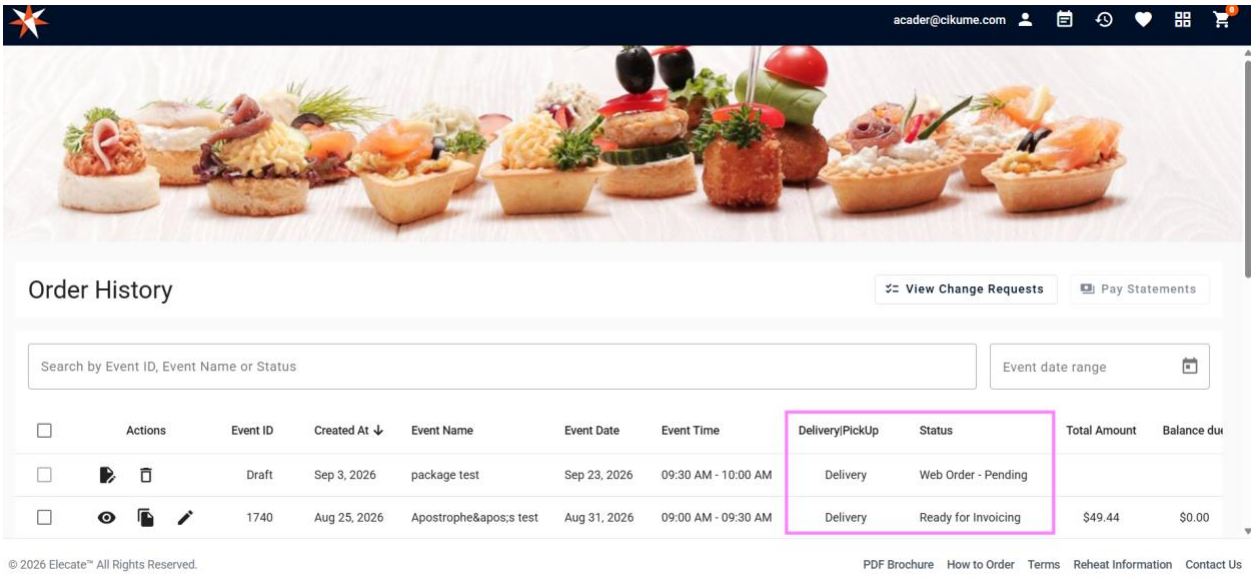
Displaying the Delivery/Pickup Column

App Setting: [WebAppShowDeliveryPickUpColumn]

This setting controls whether the Delivery/Pickup column is displayed in the Order History table.

To configure this setting:

1. Click the gear icon, then click **App Settings**.
2. Search for [WebAppShowDeliveryPickUpColumn].
3. Set the value to:
    a. Yes – Displays the Delivery/Pickup column in Order History.
    b. No – Hides the Delivery/Pickup column from Order History.
4. Click Save.



Enabling Credit Card Finance Charges

The Credit Card Finance Charge feature allows the application to apply an additional fee to credit card payments. Three App Settings are used to configure this functionality: enabling the fee, specifying its Miscellaneous Item ID, and defining the percentage to be charged.

Required App Settings

App Setting	Ex.	Description
[EnableCreditCardFinanceCharges]	No	Enables or disables credit card finance charges.
[CreditCardFinanceChargeMiscPk]	18	Specifies the Miscellaneous Item ID associated with the credit card finance charge. This item is displayed in the Order Detail.
[CreditCardFinanceChargePercentage]	3.0	Specifies the percentage charged as a credit card finance fee.

Configuring Credit Card Finance Charges

To configure credit card finance charges:

1. Click the gear icon, then click **App Settings**.
2. Search for [`EnableCreditCardFinanceCharges`].
3. Set the value to:
    a. `Yes – Enables credit card finance charges.`
    b. `No – Disables credit card finance charges.`
4. Locate [`CreditCardFinanceChargeMiscPk`] and enter the Miscellaneous Item ID associated with the credit card finance charge.
5. Locate [`CreditCardFinanceChargePercentage`] and enter the percentage to be charged.
6. Click Save.

Note: The Miscellaneous Item ID determines which item is displayed in the Order Detail when the credit card finance charge is applied. The percentage setting determines the amount of the fee.

Note: Card-network rules and some state laws limit or prohibit fees on credit card payments. Before enabling this feature, confirm that your fee percentage and how it is disclosed to customers comply with the rules that apply to your business.

Accessing the Shopping Cart

Elecate cares about you and your customers' safety. That is why the Shopping Cart uses a sign-in process to ensure that only authorized individuals can access sensitive information and perform actions within the system.

The rest of this section describes the Shopping Cart from your customers' point of view.

Sign Up

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

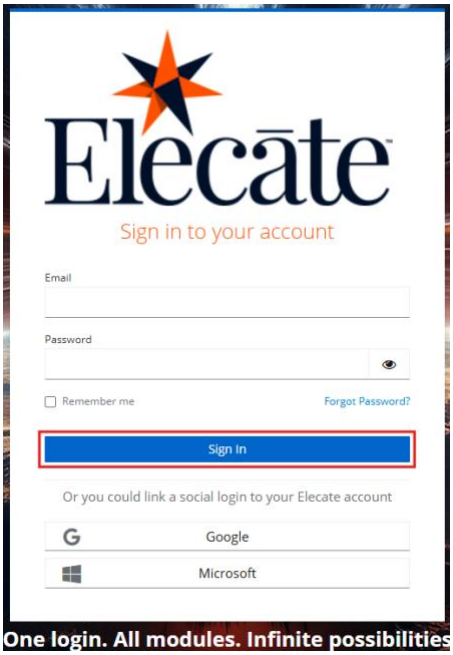
1. Click the Profile icon in the upper-right corner
2. Click *Sign Up*
3. Enter your email
4. Enter a password and confirm the password
5. Click *Register*
6. Use those credentials to log in
7. Accept the Terms & Conditions and Use of Cookies
8. Fill in your contact information
9. Click *Next*
10. Fill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

For more information, refer to this FAQ: https://faq.elecate.com/faq/sign-up-from-the-shopping-cart

Log In with Email and Password

To log in with your email address and password:

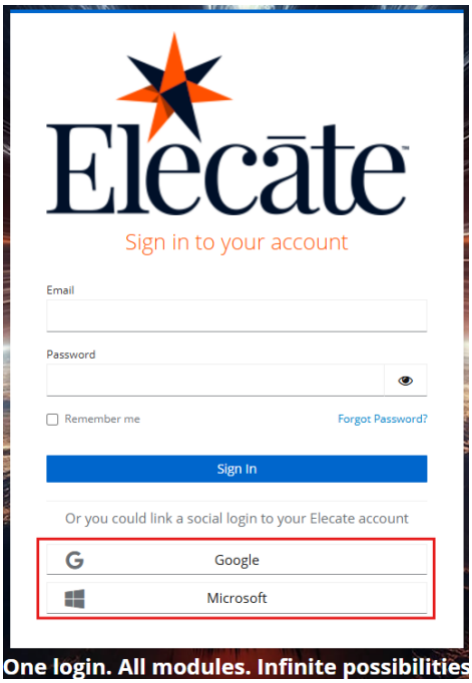
1. Click the Profile icon in the upper-right corner
2. Click *Log In*
3. Enter your credentials and click Sign In



Use Social Login

To make signing in simpler, you can sign in with your Google or Microsoft account.

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

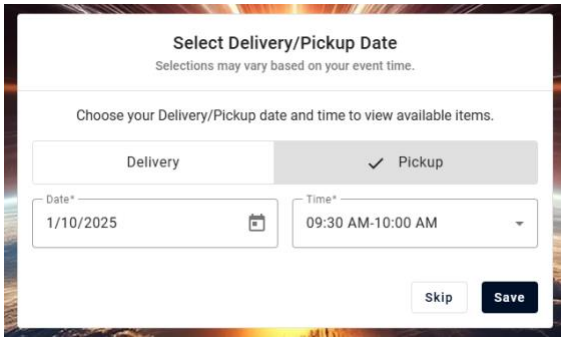


For more information, refer to this FAQ: https://faq.elecate.com/faq/log-in-with-email-and-password-

Selecting Event Date & Time

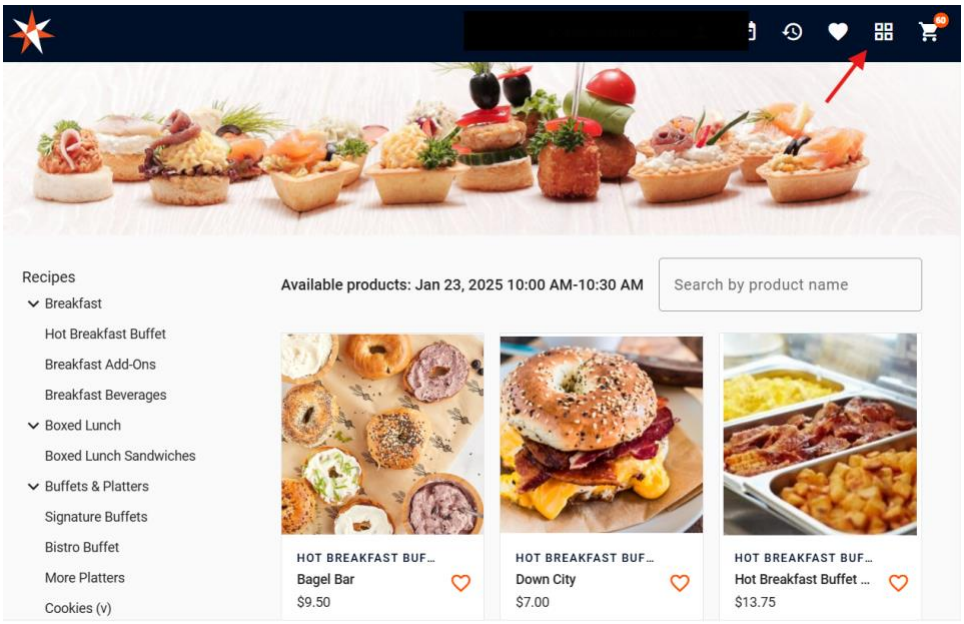
To view the products available for your event you must first choose your Delivery/Pickup date and time.

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



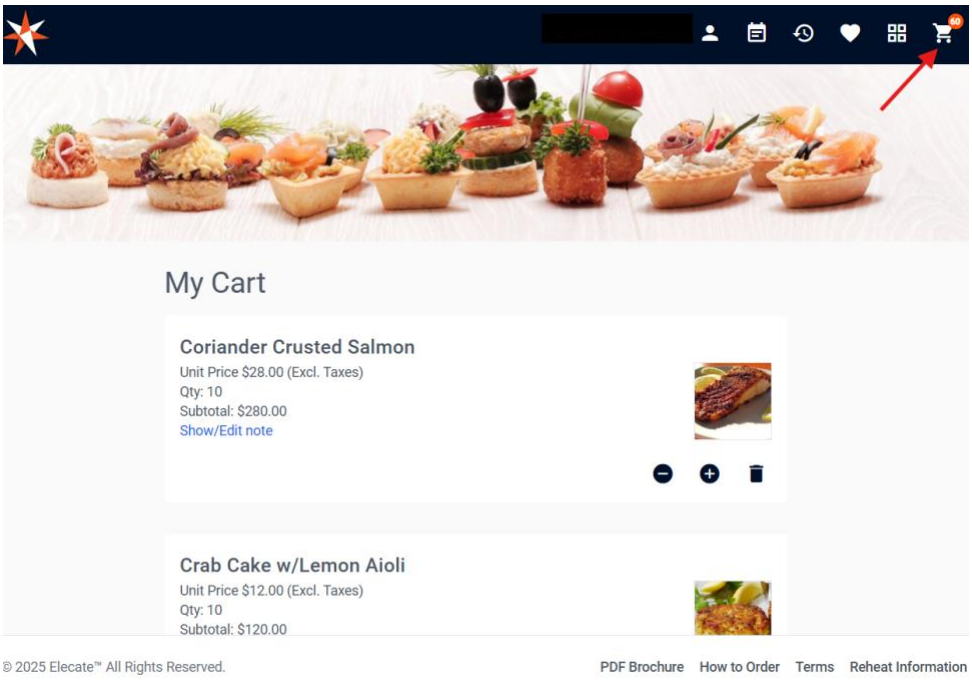
View Products

After you select the date and time, you are taken to the available products. If you move to a different window, you can return to the products by clicking the four-squares icon in the upper-right corner.



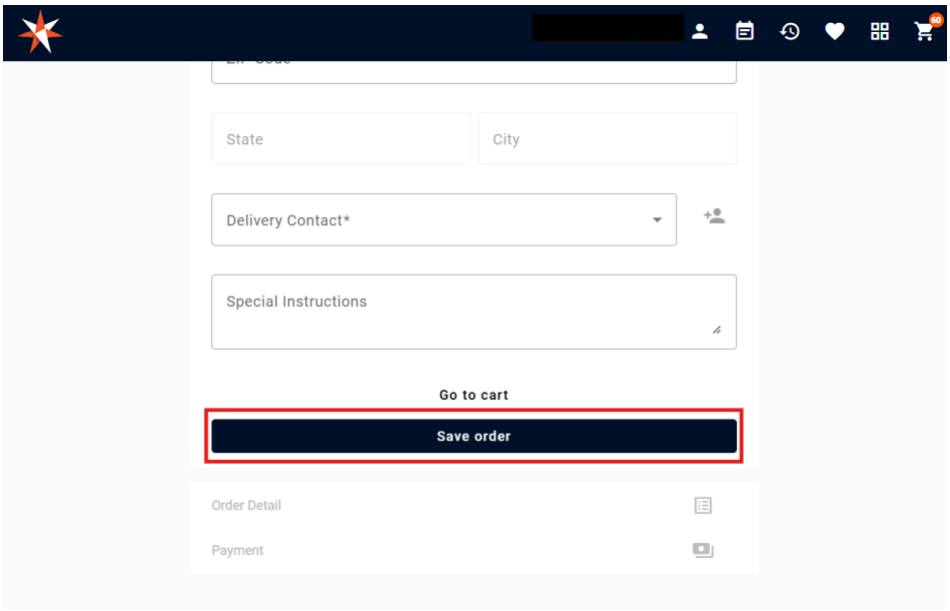
View Cart

To view the products you have added to the cart, click the cart icon in the upper-right corner.



Saving an Order

To save an order for later, go from the cart to checkout and click Save Order.



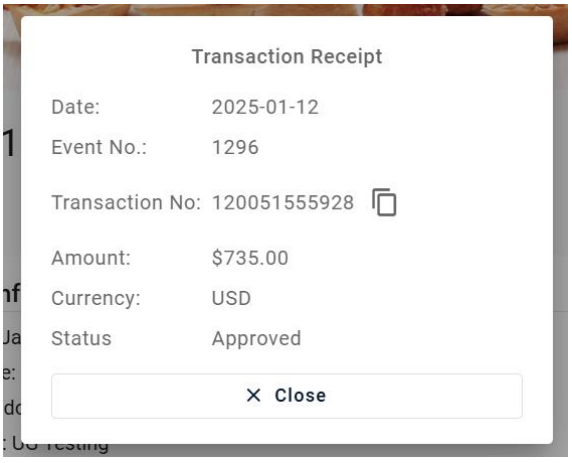
For more information, refer to this FAQ: https://faq.elecate.com/faq/placing-an-order-on-the-shopping

Processing a Payment

To process a payment:

1. Click the *Order History* icon in the upper-right corner
2. Locate the order you want to pay
3. Click the *Edit or Pay Order* icon in 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 it has been registered before
8. Confirm you want to process the payment

After the payment is processed, you will receive a transaction receipt:



For more information, refer to this FAQ: https://faq.elecate.com/faq/processing-a-payment

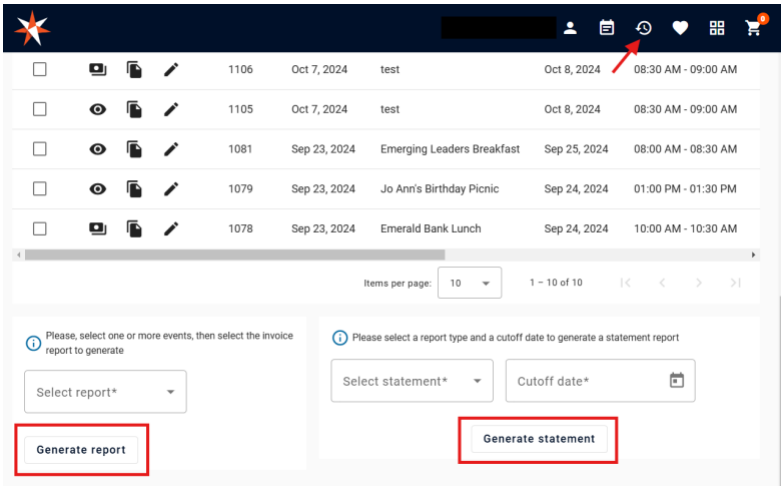
Reports

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.

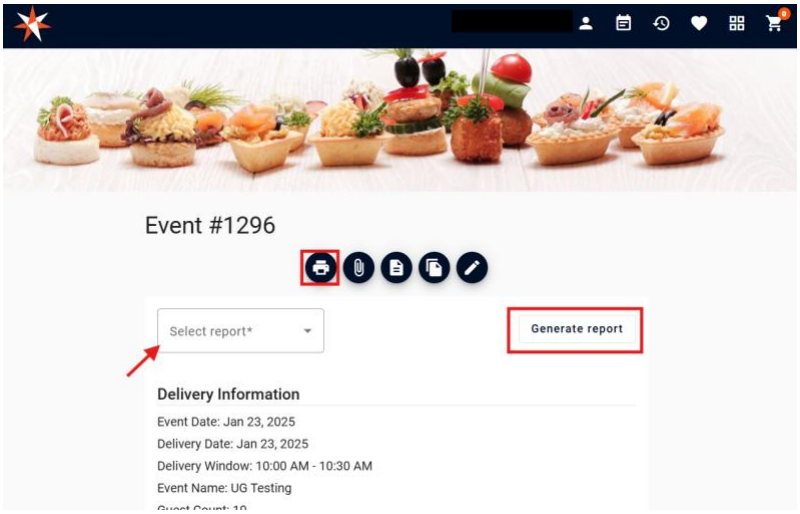
To print reports or statements from the order history:

1. Click the order history icon in the upper-right corner
2. Select the order or orders you want to include in your report
3. Scroll down to the options for selecting the reports you want to print
4. Click *Generate Report* or *Generate Statement*



To print reports from an order:

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



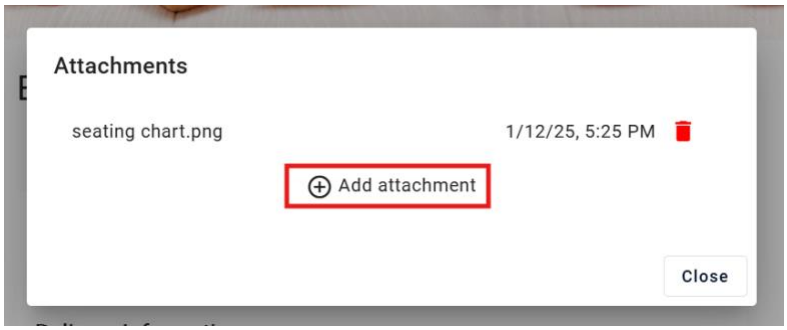
For more information, refer to this FAQ: https://faq.elecate.com/faq/reports-for-the-shopping-cart-

Upload/View Attachments

Attachments uploaded from the Shopping Cart appear in the event's Event Files, making communication between the customer and the salesperson easier.

To upload or view attachments on an order:

1. Click the order history icon in the upper-right corner
2. Click the *View Order* icon or *Edit or Pay Order* icon in the Actions column
3. Click the clip icon



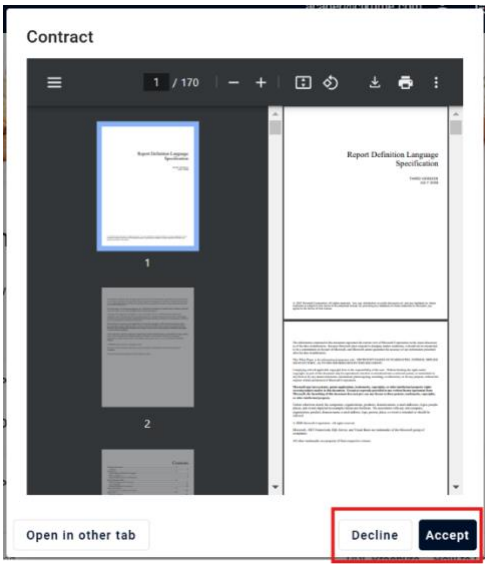
- To view an attachment, click it.
- To upload a new attachment, click Add Attachment.

For more information, refer to this FAQ: https://faq.elecate.com/faq/upload/view-attachments-for-the-shopping-card

Accept/View Contract

After the customer accepts the contract, the order automatically moves to the status set by the administrator (usually Confirmed). To view or accept the contract:

1. Click the order history icon in the upper-right corner
2. Click the *View Order* icon or *Edit or Pay Order* icon in the Actions column
3. Click the contract icon



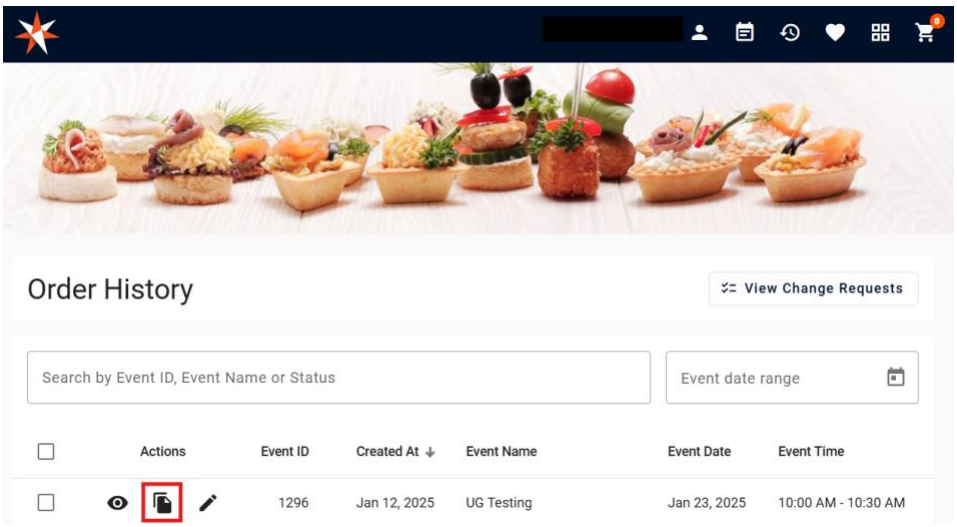
For more information, refer to this FAQ: https://faq.elecate.com/faq/accept/view-contract

Copy Order

When you copy a past order, you can edit the cart to add or remove items, or proceed to checkout without making changes. This makes it easy to place an order with the same or similar items as a previous one.

To copy an order:

1. Click the *Order History* icon in the upper-right corner
2. Locate the order you want to copy
3. Click the copy icon in the Actions column



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

For more information, refer to this FAQ: https://faq.elecate.com/faq/copy-order-for-the-shopping-cart

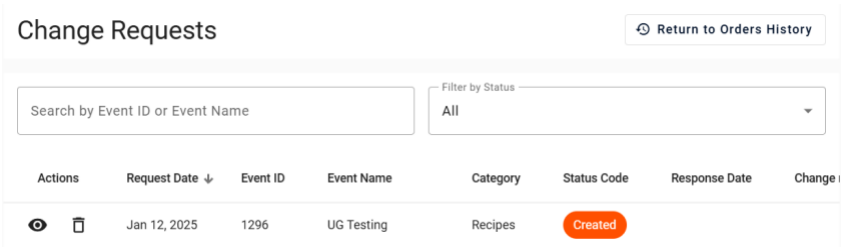
Making Changes on an Existing Order

Customers can make changes to existing orders, depending on the business rules set for the Shopping Cart. This makes communication between the customer and the salesperson easier.

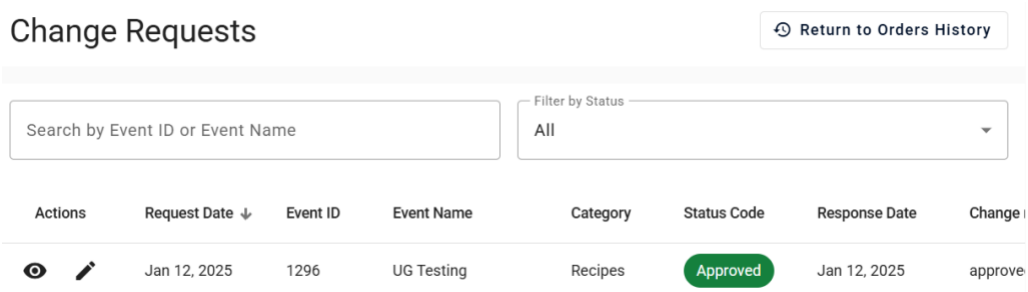
To make changes to an existing order:

1. Click the *Order History* icon in the upper-right corner.
2. Locate the order you want to change.
3. Click the pencil icon in the Actions column.
4. This will take you back to the cart so you can add or remove products.
5. After making your changes, click Submit Request.

The order will appear in the change requests list with the status “Created.”



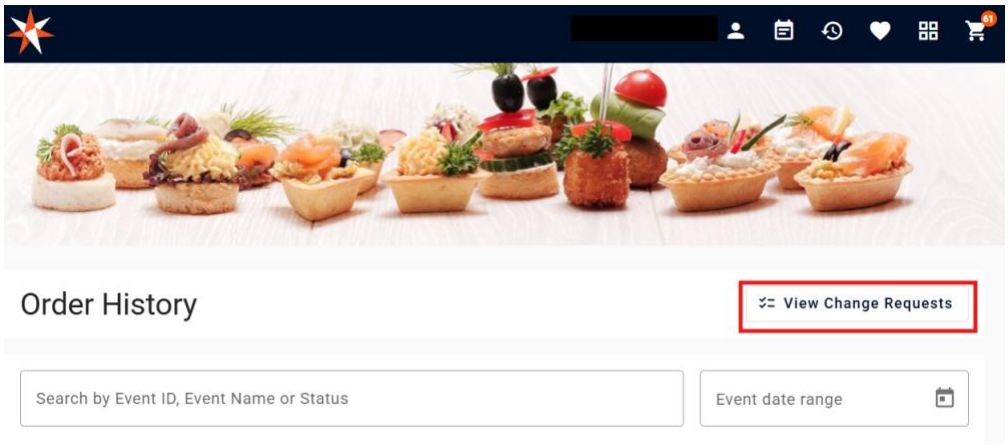
After staff approve the change request, its status changes to “Approved.”



For more information, refer to this FAQ: https://faq.elecate.com/faq/making-changes-on-an-existing-order-for-the-shopping-cart

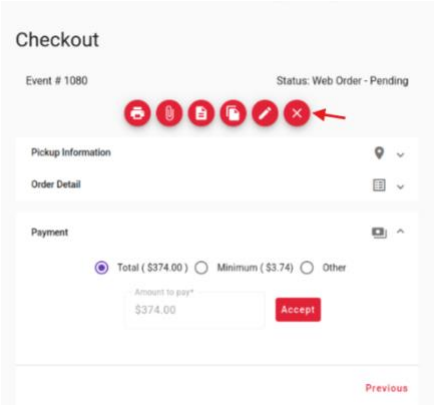
View Change Requests

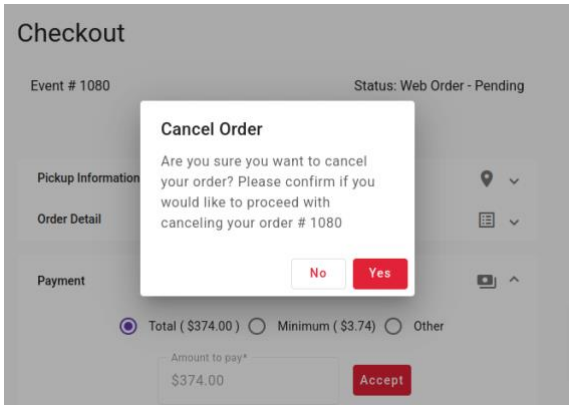
You can view all your change requests from the order history by clicking on *View Change Requests.*



Cancel Order

1. Click the order history icon in the upper-right corner
2. Click the *View Order* icon in the Actions column
3. Click the Cancel Order (X) icon
4. Enter the reason for canceling the order
5. Click *Confirm*

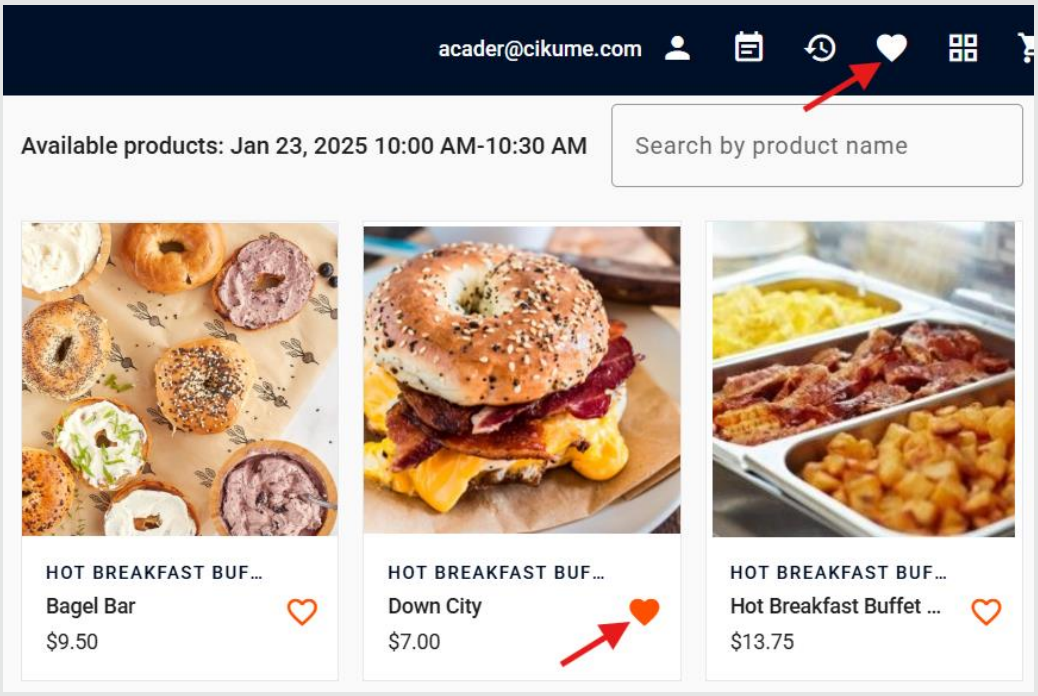




For more information, refer to this FAQ: https://faq.elecate.com/faq/cancel-orders-for-the-shopping-cart

Favorites

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



For more information, refer to this FAQ: https://faq.elecate.com/faq/how-to-add-favorites-to-the-shopping-cart