

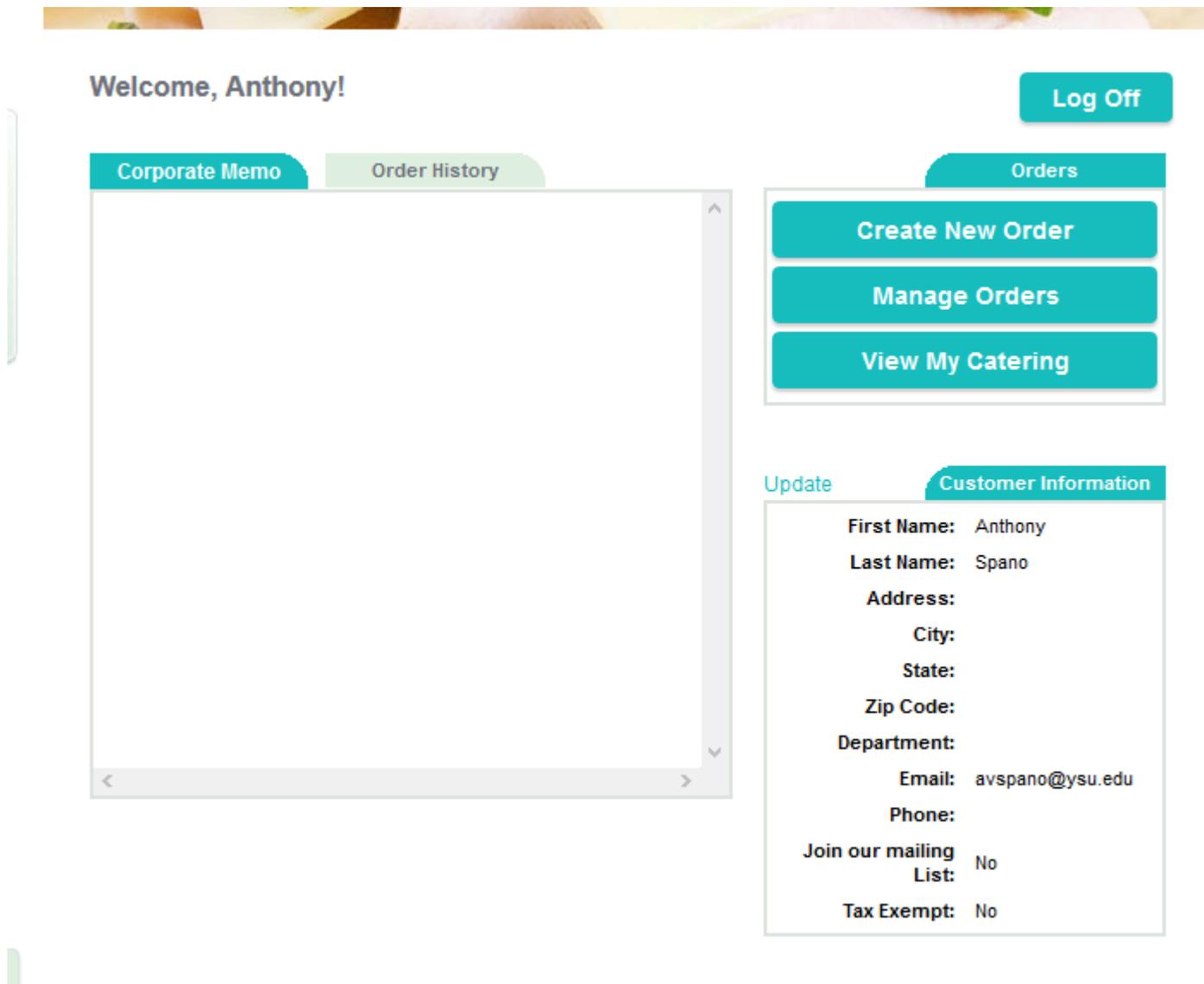
Ordering through the Chartwells Catalog in eCUBE

(Updated January 2019)

Orders for Chartwells will be placed through the Chartwell/Catertrax punch-out catalog effective July 1, 2016. If you need assistance, please contact Procurement Services at procure@ysu.edu.

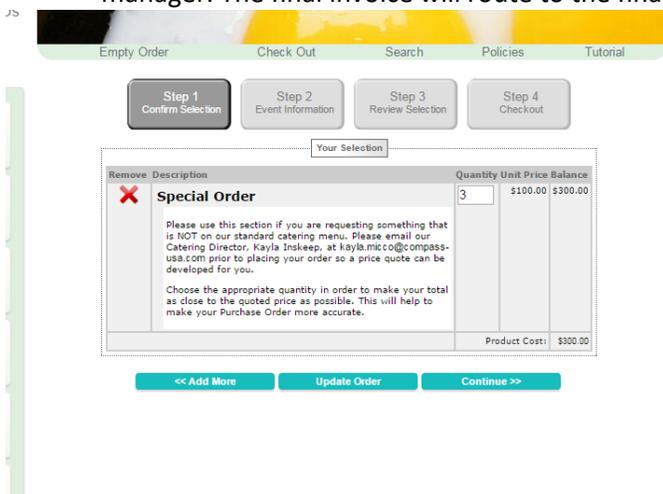
Requestors will punch-out through the Chartwell's catalog by clicking on the Chartwell's icon located in the "Catering Services for Campus Events" showcase.

The Order menu is on the right-hand side of the screen. You can "Create New Order", "Manage Orders" or "View My Catering".



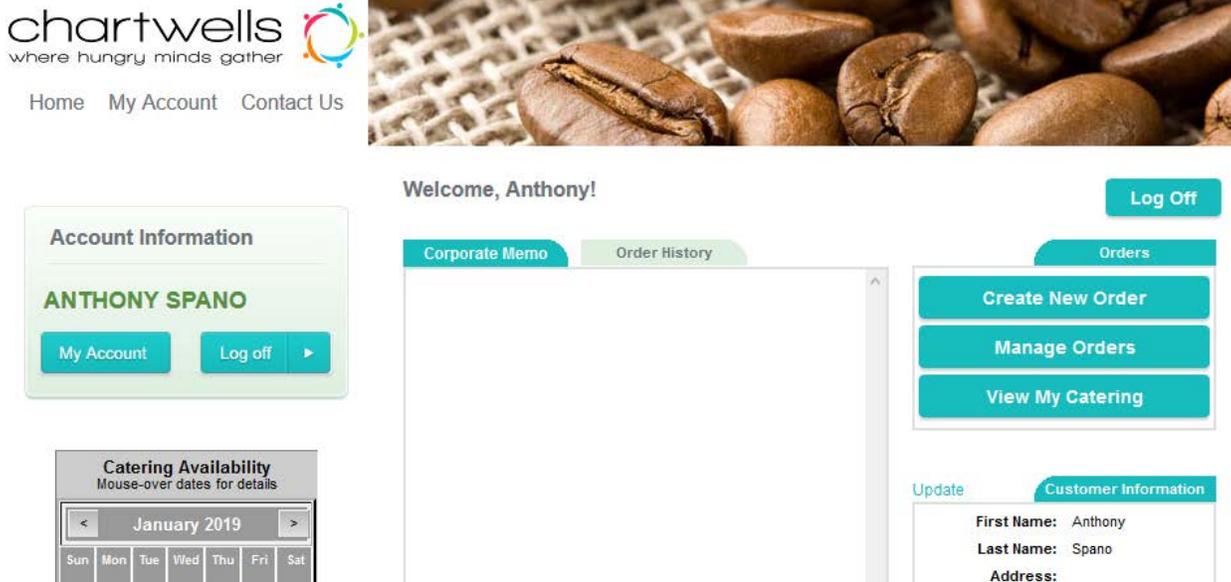
1. Click "Create New Order" to create a new order.
2. Click the category – In Any Event, Just the Basics, Meeting Well to choose your items from these categories.
3. Click the specific food menu, which will appear down the right-hand side of the screen.
4. Select the "view details" button on the type of food.
5. Choose the quantity of items and/or selection of food that you wish – add any special instructions.
6. Click the Order button to add the items to your Order.
7. Confirm your selection and click the Continue at the bottom of the page.

8. Enter the Date of the Event (Must be approved *at least 72 hours* prior to the event). Select the Delivery/Pickup Method and enter the rest of the Event information and Details and any Special Instructions.
9. Hit the “Continue” button at the bottom of the screen.
10. Review the order and then click the “Proceed to Checkout” button at the bottom of the screen.
11. Select a Payment Method – drop down the menu and choose “Purchase Order”.
12. Click “Process This Order” at the bottom of the screen. **This action will generate an email to you from Catertrax.**
13. Make sure to process the order to bring it back into eCUBE immediately, so as not to lose the order due to a time-out limitation within Catertrax.
14. Also, only process one Catertrax order per requisition to avoid any invoicing issues.
15. Process the requisition. For additional help on processing a requisition - see the [eCUBE Quick Reference Guide](#).
16. You must attach a completed BRE form to the requisition to document the legitimate business purpose and compliance with BRE Guidelines. The financial manager does not need to sign the BRE since they are electronically approving the invoice. Save the BRE form with the event date as part of the file name.
17. If the order is over \$5,000, the BRE form must be signed by the Area Division Officer prior to the event.
18. The requisition will be approved by the financial manager and purchasing (if over \$5,000) and the system will automatically send the approved PO to Chartwells for fulfillment.
19. Please note – in the Chartwell’s system – when you process the order in the Chartwell’s catalog this will send your order to Chartwells in a “**Pending PO**” status. **The order will not be fulfilled until the financial manager approves** the requisition and a purchase order is generated. The order’s status will then be updated to “**Confirmed PO**” and the order will be filled at that time.
20. **After you choose your items in Catertrax and bring your cart back into eCUBE if your requisition is rejected at any time prior to becoming a Purchase Order, you can copy your requisition to a new cart and process once the problem causing the rejection is rectified. Each order in the Chartwell’s catalog has a unique order number which comes into the Requisition under catalog number and is used to match the order in the catalog with the purchase order so do not use this feature in order to duplicate the order for another event. See the instructions below to duplicate an order for a different event.**
21. After the event, Chartwell’s will send an invoice back through eCUBE. If the invoice and the PO match, the invoice will automatically be paid. If there is a difference, the invoice will route to the financial manager for approval. **You will not need to enter a receipt for the order.**
22. Specialty Items – a new ordering button has been added to the catalog called Special orders. This button allows you to choose in increments of \$100 to the closest dollar amount of your specialty order in order that the closest dollar estimate is approved by the financial manager and encumbered on the purchase order. Email Carissa Renninger at Carissa.Renninger@compass-usa.com with your specialty order and copy the financial manager. The final invoice will route to the financial manager for approval.



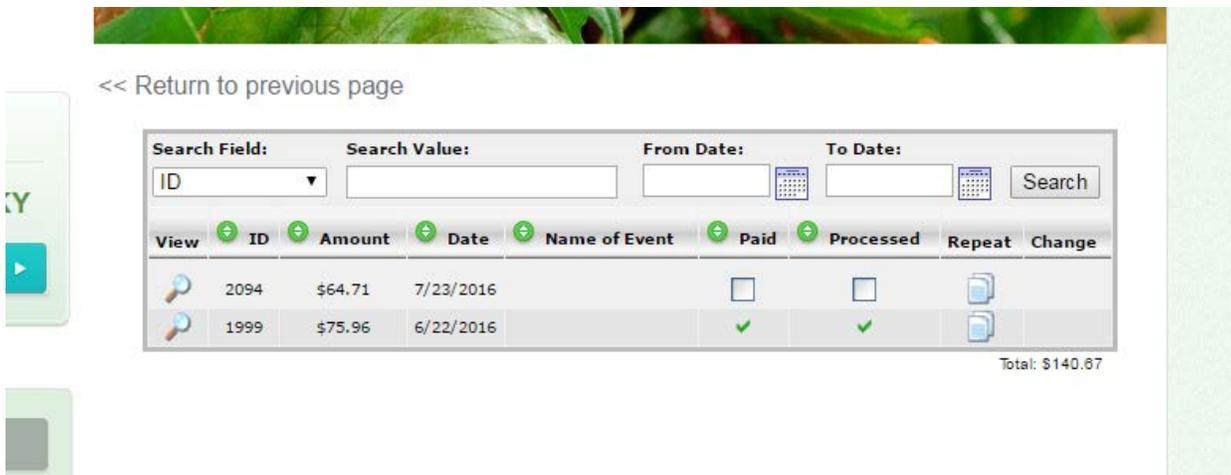
Duplicating an order for a different event

1. To duplicate an order or create a similar order In Catertrax - punchout to the Catertrax catalog



The screenshot shows the Chartwells user interface. At the top left is the Chartwells logo with the tagline "where hungry minds gather" and navigation links for Home, My Account, and Contact Us. A banner image of coffee beans is visible. The main content area is titled "Welcome, Anthony!" and includes a "Log Off" button. Below this are tabs for "Corporate Memo" and "Order History". On the right, there is a "Orders" section with buttons for "Create New Order", "Manage Orders", and "View My Catering". Below the "Orders" section is an "Update" section with a "Customer Information" tab showing fields for "First Name: Anthony", "Last Name: Spano", and "Address:". On the left, there is an "Account Information" section for "ANTHONY SPANO" with "My Account" and "Log off" buttons. Below that is a "Catering Availability" calendar for January 2019.

2. Click on Manage Orders – Your orders will appear. Click on the paper stack icon under “Repeat” for the order you wish to duplicate.



The screenshot shows the Chartwells order management interface. At the top left is a "<< Return to previous page" link. Below this is a search field with "Search Field:" set to "ID", "Search Value:" empty, "From Date:" empty, and "To Date:" empty. A "Search" button is to the right. Below the search field is a table of orders with columns: View, ID, Amount, Date, Name of Event, Paid, Processed, Repeat, and Change. The table contains two rows of data. The first row has ID 2094, Amount \$64.71, Date 7/23/2016, and Repeat icon. The second row has ID 1999, Amount \$75.96, Date 6/22/2016, Paid checked, Processed checked, and Repeat icon. A "Total: \$140.67" is shown at the bottom right of the table.

View	ID	Amount	Date	Name of Event	Paid	Processed	Repeat	Change
	2094	\$64.71	7/23/2016		<input type="checkbox"/>	<input type="checkbox"/>		
	1999	\$75.96	6/22/2016		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

3. Your new order will appear. Make any necessary changes to quantities and remove/add any items.
4. Click Update Order and then the Continue button at the bottom of the screen. Select the date of the event.
5. Refer to step 8 on page 1 and continue as normal.

If you need to change your order or have questions about Chartwells/Catertrax catalog/menus or specialty items, email Carissa Renninger at Carissa.Renninger@compass-usa.com. Include the purchase order number in the e-mail and copy your financial manager, so they are aware of changes or specialty orders.