

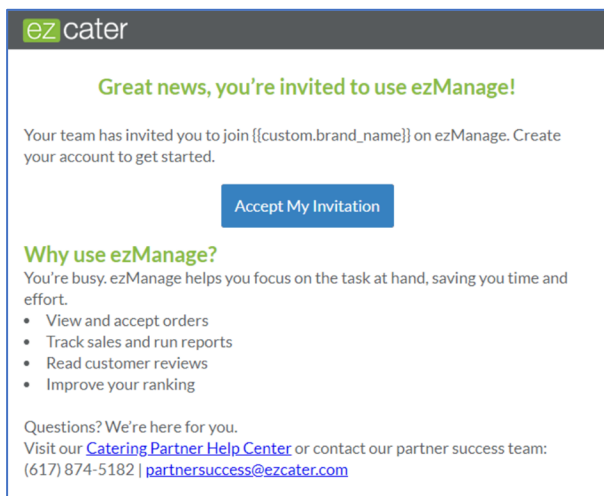


ezCater Job Aid

Creating an Account and Accessing ezManager

An activation email (example below) will be sent from partnersuccess@ezCater.com

1. Click through to accept the invitation.
2. Set up your password on the following screen.
3. Use a generic password – potbellyXXX (replace the XXX with your Shop number).



To access your ezManage account:

www.ezCater.com/caterer_portal/sign_in

Log-in:

- ⇒ Store: psw[storenumber]@potbelly.com
- ⇒ DM/RD: firstname].[lastname]@potbelly.com
- ⇒ Password: potbellyXXX (replace XXX with shop number)

Resetting your Password

⇒ You will receive an activation email (example below) from support@ezCater.com

Forgot your password, Tali?



No problem, it happens to the best of us!

Just click the link below and we will bring you to a page where you can reset your password:
https://www.ezcater.com/caterer_portal/contacts/reset_password?ct=abebab67d727ca1c008f1bb3e3b10a5905d736cb

Thank you for partnering with ezCater!

- ⇒ Click the link provided to reset your password
- ⇒ Use generic password: potbellyXXX (replace XXX with shop number)

Reset Password

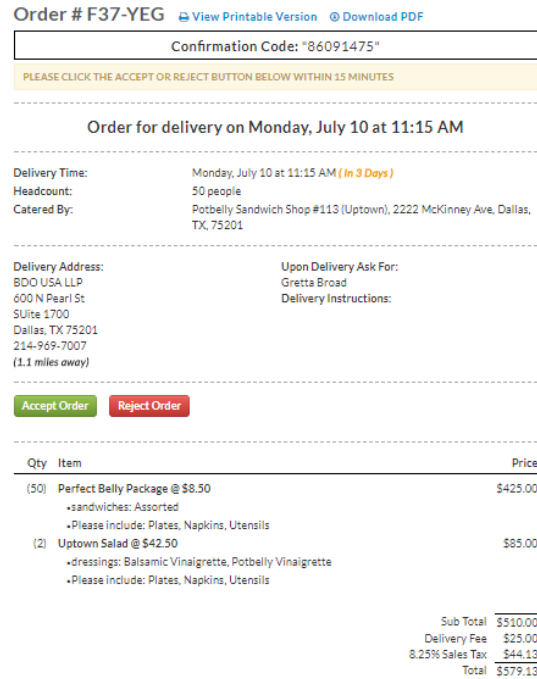
Please enter a new password for your account

Password

Confirm password

Accepting Orders

⇒ Review future orders in the ezManage portal each **morning** and again **at close**, accepting them by clicking the green “**Accept Order**” button.



Order # F37-YEG [View Printable Version](#) [Download PDF](#)

Confirmation Code: "86091475"

PLEASE CLICK THE ACCEPT OR REJECT BUTTON BELOW WITHIN 15 MINUTES

Order for delivery on Monday, July 10 at 11:15 AM

Delivery Time: Monday, July 10 at 11:15 AM (In 3 Days)
Headcount: 50 people
Catered By: Potbelly Sandwich Shop #113 (Uptown), 2222 McKinney Ave, Dallas, TX, 75201

Delivery Address: BDO USA LLP
600 N Pearl St
Suite 1700
Dallas, TX 75201
214-969-7007
(1.1 miles away)

Upon Delivery Ask For: Gretta Broad
Delivery Instructions:

[Accept Order](#) [Reject Order](#)

Qty	Item	Price
(50)	Perfect Belly Package @ \$8.50	\$425.00
	-sandwiches: Assorted	
	-Please include: Plates, Napkins, Utensils	
(2)	Uptown Salad @ \$42.50	\$85.00
	-dressings: Balsamic Vinaigrette, Potbelly Vinaigrette	
	-Please include: Plates, Napkins, Utensils	
	Sub Total	\$510.00
	Delivery Fee	\$25.00
	8.25% Sales Tax	\$44.13
	Total	\$579.13

⇒ Each morning, print orders for that day (do not print prior to this, as orders can be modified until the day of the order).

NOTE: Note that orders can be printed from the ezManage portal on Productivity Tablet by connecting a USB cord to your BOH printer.

⇒ Once printed, enter the order into ATO and tender using the house account, as described on the next page.

Tendering ezCater Orders

1. Ring the order into ATO. Include the customer's information (including the name of the business) Use 800.488.1803 as the phone number (this is ezCater Customer Care).

THEN, EITHER

- 2a. When ezCater is paying Potbelly for the order as shown in the red circle below:

Subtotal	\$307.98
Delivery Fee	\$30.80
8.8% Sales Tax	\$29.81
Tip	\$0.00
Total	\$368.59
Caterer Total Due	\$306.75
You will be paid by ezCater. Do NOT collect payment or tips on-site.	
	PAID

- ⇒ Ensure that the Total on the Order Confirmation matches the Total in the POS.
- ⇒ If the totals do not match, contact an ezCater representative at 800.488.1803.
- ⇒ If they do match, select Confirm ATO Order.
- ⇒ Select the ezCater button to tender the order.

Order Confirmation

Sam Martinez

ORG Smoked Ham
HAM
SWISS

Order Mode: Pick Up
Ready Time: 10:20 AM
Phone Number: (312) 676-3312
Notes:

Food Total: \$8.39
Tax: \$0.99
Sub Total: \$9.38

Confirm Add Card EzCater

OR

- 2b. When customer is paying by check or CSM sends a Direct Entry order (If you have any questions, contact your Catering Sales Manager (do not contact the customer).

- ⇒ If the client is paying by check:
 - Tender order to Cash in ATO.
- ⇒ This applies to orders that say:
 - "Payment In-store"
 - "Please collect payment at time of delivery"
- ⇒ If other tender is required, please follow instructions on Order Sheet.

FAQs - EZ Cater

Q: What if this order is outside of my delivery zone?

A: *Work with your District Manager to find a driver or call a neighboring shop.*

Q: What if the tax, price or total is incorrect?

A: *Call ezCater to let them know the correct amounts for your shop.*

Q: Why doesn't the customer provide their phone number?

A: *ezCater protects the customer info. If you have any questions during the process, feel free to call 800-488-1803.*

Q: The customer didn't provide specifics on what they want, what should I do?

A: If the customer didn't specify toppings, make the order plain, as stated.

Q: How do I enter a tip in a future ezCater Order?

A: *In the notes section of ATO, enter the tip amount in so that it is visible on the Chit as well as on the receipt.*

Q: Why doesn't my order have a tip?

A: This may be an oversight or the customer has chosen to add the tip at the time of delivery. If the customer decided to not leave a tip, please remember we have a no solicitation tip policy.

Q: How do I add a tip that the customer has added after it was delivered?

A: Call ezCater help line and communicate the tip amount, adjust your order in ATO and close as normal.

Q: Do I have to wait for ezCater to call the customer before I add the tip?

A: Yes, we must call ezCater to make sure the order confirmation has been updated.

Q: What if we can't deliver at that time?

A: Try to accommodate the order for an earlier time if possible, otherwise, contact ezCater and let them know what the earliest time you can deliver is before accepting the order.

Q: How will I know if an order has been modified?

A: If a customer modifies an order with less than 24 hours' notice, ezCater calls the shop to ensure you can take it. If agreed, they send a new email to accept the modification. If notice is more than 24 hours, the shop will receive a modified order to accept. Remember to use your portal for most up to date order details.

Q: How will I know if an order has been cancelled?

A: If a customer cancels an order with less than 24 hours' notice, ezCater will call the shop to get permission. If shop agrees, ezCater will send order over as cancelled. If notice is more than 24 hours, ezCater will adjust and send cancellation. Monitor portal for most up to date order details.

Q: Who do I contact for help?

A: It depends on how the order was placed, please see page 3 of this Job Aid.