



## Completing a House Account Transaction

There are multiple ways a customer can place an order using their House Account: Phone-in, Catering Sales Manager, or in Shop.

⇒ To save time we highly recommend saving House Account numbers to a Customer profile

NOTE: OLO cannot accept House Account orders.

1. To convert an existing customer profile and save their new house account, go to Edit Customer and click on the House Account tab in the profile set up.

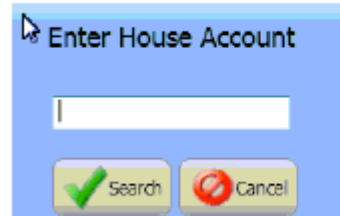
⇒ It is very important to enter the First and Last Name of EVERY customer in ATO for Pick Up and Delivery. Customers will not pay their invoices if the names are missing.

⇒ If you are given a PO or any other reference number at the time of the order, please include it in the first name field in ATO. Examples of reference numbers used: PROD ID #, VOUCHER #, TOUR ID, UNIVERSITY/SCHOOL PURCHASE ORDER #, etc.

2. Click on Select Account

3. Enter the House Account Number and click Search

⇒ DoorDash account numbers are 112xxx, with the Shop number replacing the xxx.



- Shop 411: 112411
- Shop 417: 112417
- Shop 445: 112445
- Shop 450: 112450
- Shop 459: 112459
- Shop 492: 112492

4. Select the correct House Account.



ID	Company	Contact	Phone	Tax Exempt	Active
1000	TEST	Sam Martinez	312-312-3121	No	Yes

5. Click OK to save the information.



Once a customer has a House Account saved, any orders entered for them will activate the House Account payment button in ATO. You can then Apply Payment, (same as with credit cards) or remove the house account if desired. If you press Apply Payment, this will automatically charge the saved House Account number.

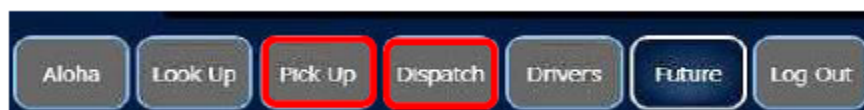


6. If the customer would like to use a form of payment aside from their saved House Account, click the Remove House Account button to remove from their order and follow the normal Closing Orders procedure. This will remove the House Account number from this order; however it will still remain on the customer's account. On the Orders tab, the order will be tagged with a house icon indicating it is a house account order.

Select **Confirm** on the Order Confirmation screen.

1. Next, select "Dispatch" (if the order is for delivery) or the "Pick Up" tab (if the order is for pick up).

NOTE: Note the DoorDash should ALWAYS be entered as delivery!



2. Select the order that you would like to apply House Account payment to from the list of open orders.

⇒ If the customer has a house account saved, press the “Apply Payment” button to tender their order. If they have not previously entered their account number, edit the customer information and add the house account to their profile before tendering the transaction.



Mode	Status	Promise Time	Total	\$	
Delivery	Ready	8:00 AM	\$14.85		
Delivery	Ready	10:10 AM	\$8.50		

3. Press the “Apply Payment” button on the right side of the screen.

4. The order will have the payment properly applied.

