

How to Create a Customer Account from the Back-of-House

When you need to create a new account for your customer, it's easy to do right from your CaterTrax site!

1. From the CaterTrax Administrative view, click on the **Customers** icon.



2. Click **Create New Customer**.



3. Enter first name, last name, and email address. **Note:** Additional information may be required for your site. Fields marked with an asterisk (*) are required.

Please fill in the required fields below

*First Name:	<input type="text"/>
*Last Name:	<input type="text"/>
*Email:	<input type="text"/>

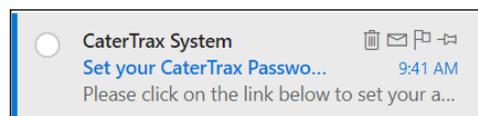
4. Select applicable checkboxes. **Note:** If the customer will be logging into their account, the "Set Password" email must be checked.

Join our mailing List:	<input type="checkbox"/>
Tax Exempt:	<input type="checkbox"/>
Send "Set Password" Email:	<input type="checkbox"/>

5. Click **Create Customer**.



6. The customer can use the **Set Password** email or the **Forgot Password** link on the login page to set/change their password.



Congratulations, you have created an account for your customer! You can log into their account from the **Customers** icon at any time, without a password.