How to Place a Take-Out Order Administratively

With CaterTrax online ordering, you can place a take-out order for a customer at any time, on any device. Whether you are planning for a special event, team meeting, or your next meal, we've got you covered.

Follow the steps below for a quick and easy way to manage your take-out orders. With an administrative account, you gain access to place and modify Take-Out orders on behalf of customers.

GET STARTED

To start, visit your CaterTrax website.

1. Click **Admin Sign In** in the bottom right corner of the homepage. (Figure 1)

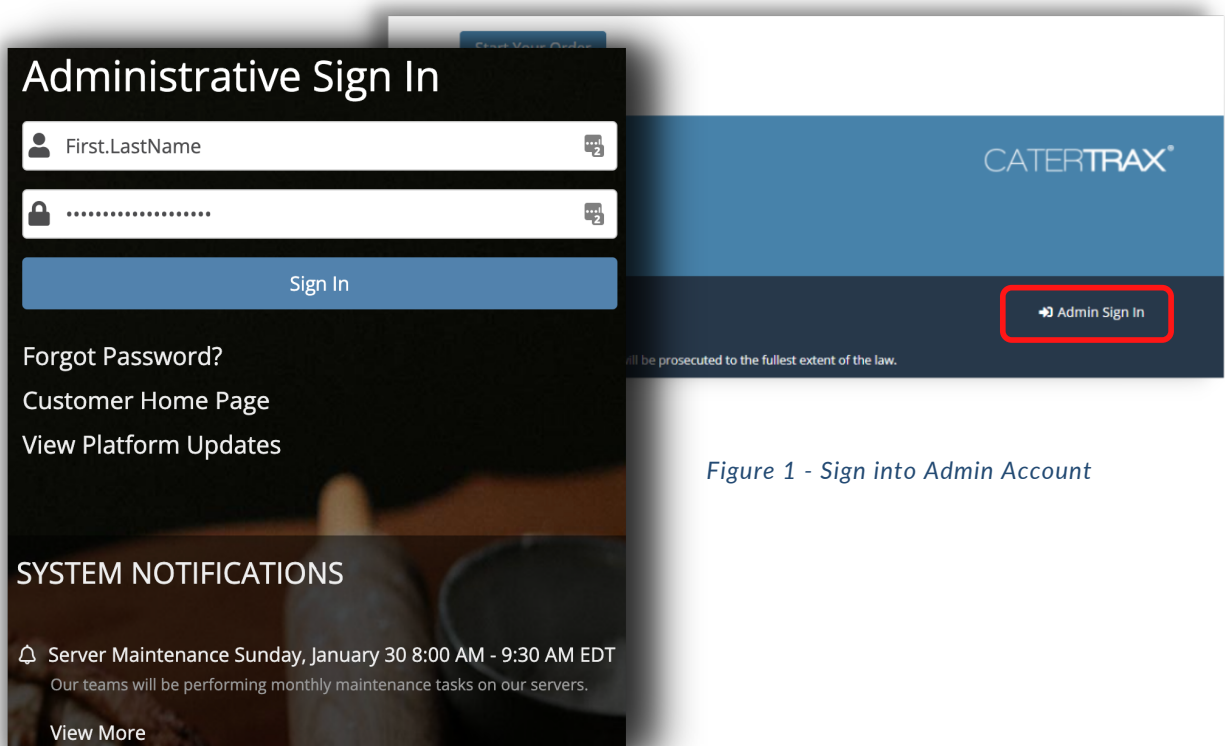2. Complete all required fields on the **Administrative Sign In** page and click Sign In.

Figure 1 - Sign into Admin Account

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LOCATE CUSTOMER ACCOUNT

Make sure you are logged into your account as an administrator.

1. Click **New Order** in the top left corner of the calendar landing page. (Figure 2)

2. Select Take-Out **Ordering Option** and locate or create your customer's profile. (Figure 3)

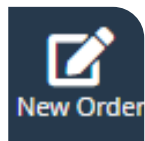3. Click **Create Order** button. (Figure 4)

Figure 2 - Admin New Order

Figure 3 - Ordering Option & Search/Create Customer Accounts

Figure 4 - Create Order Button

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CREATE A NEW ORDER

Make sure you are logged into your account as an administrator.

1. Choose your Take-Out menu from the listed selections. (Figure 5)

2. Browse the menu and select the item(s) you want to order.

3. For each item, fill in item details and click **Add to Cart**.

4. Once all items have been added to your cart, click on **Check Out** in the cart**. (Figure 6)
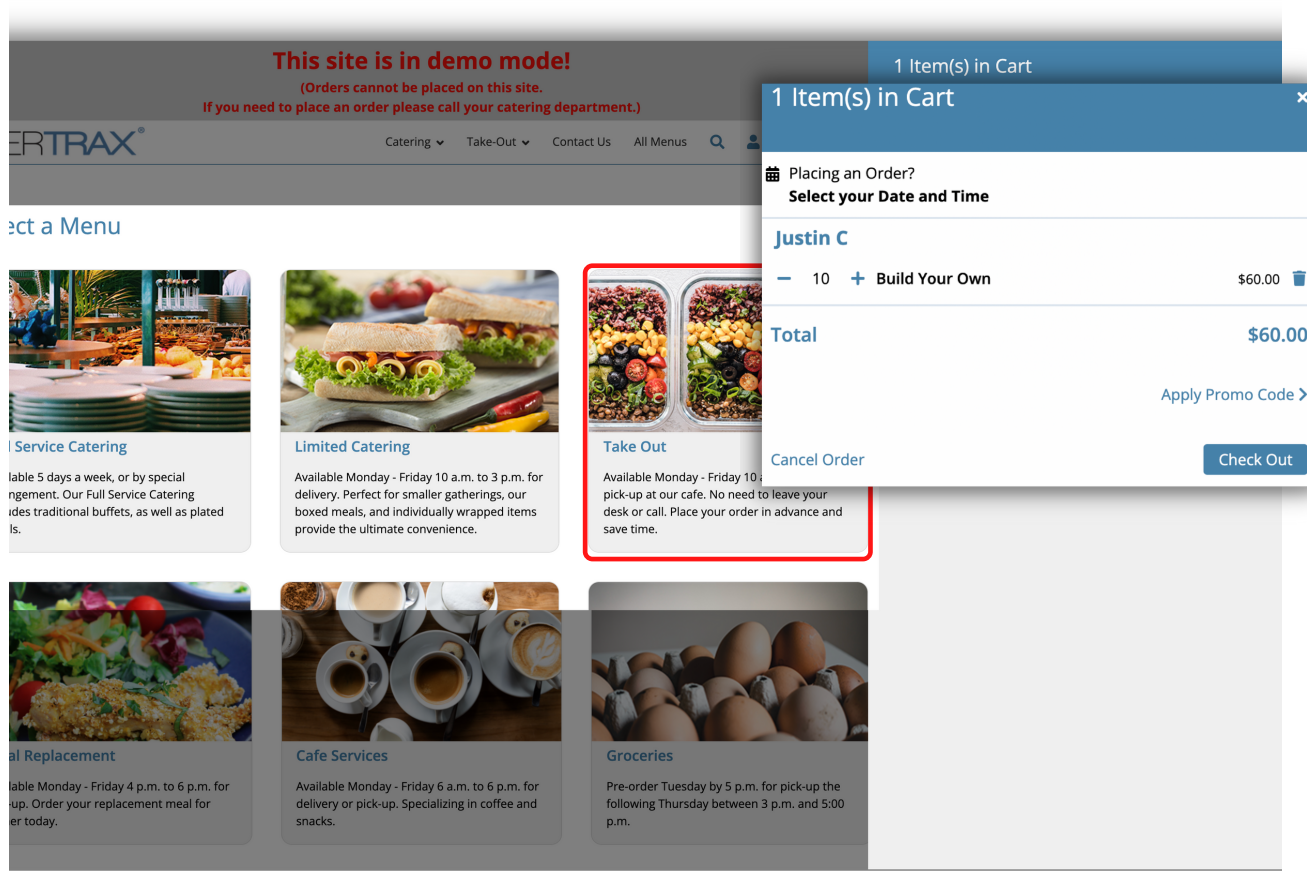
Figure 5 - Take-Out Menu

Figure 6 - Check Out

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ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

5. Review the order on **Step 1** and click **Continue**. (Figure 7)

6. Select a date and time for the order on **Step 2**, and complete the applicable Pickup or

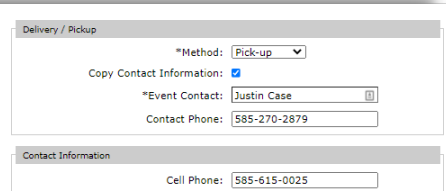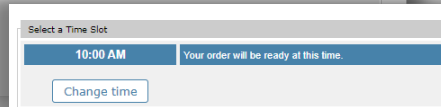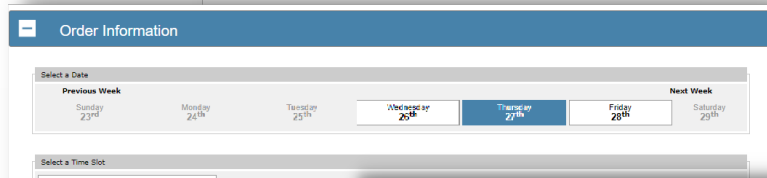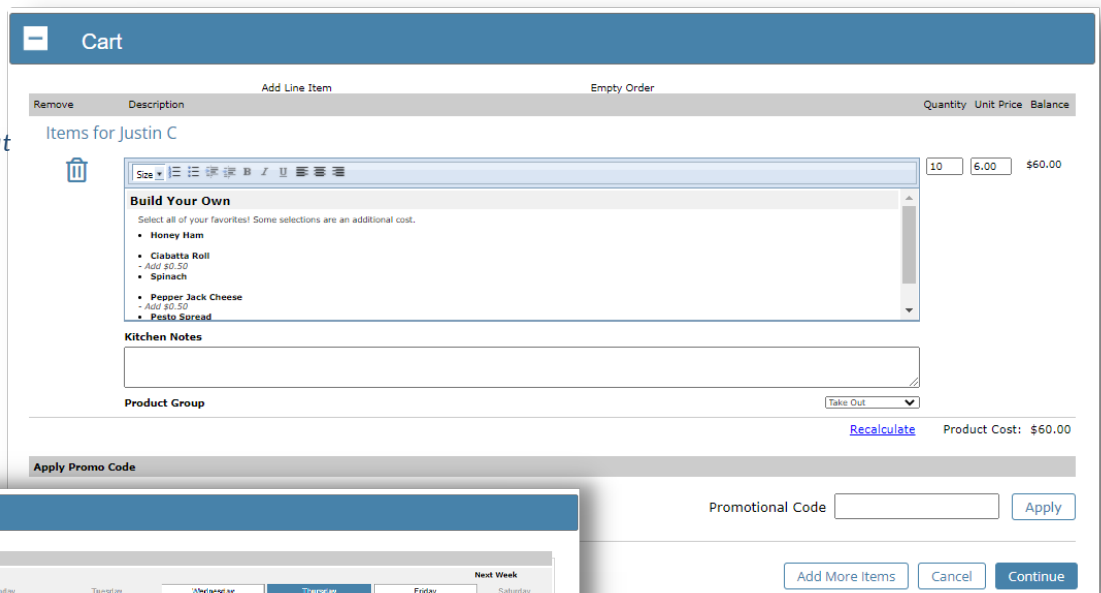Delivery information. (Figure 8)

Figure 7 - Check Out Step 1

Figure 8 - Check Out Step 2

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ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

7. Review Order Summary on Step 3 and, if correct, click Continue. (Optional) Add a name

to your order using the Order Name field.(Figure 9)

Figure 9 - Check Out Step 3

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COMPLETE ORDER CHECK OUT

Make sure you are logged into your account as an administrator.

8. Step 4 will have you Select your payment method, complete the details, and click Place Your Order. (Figure 10)

Figure 10 - Check Out Step 4

QUESTIONS?

To contact support with any questions, submit a support ticket via the Support tab.