**TUTORIAL /**
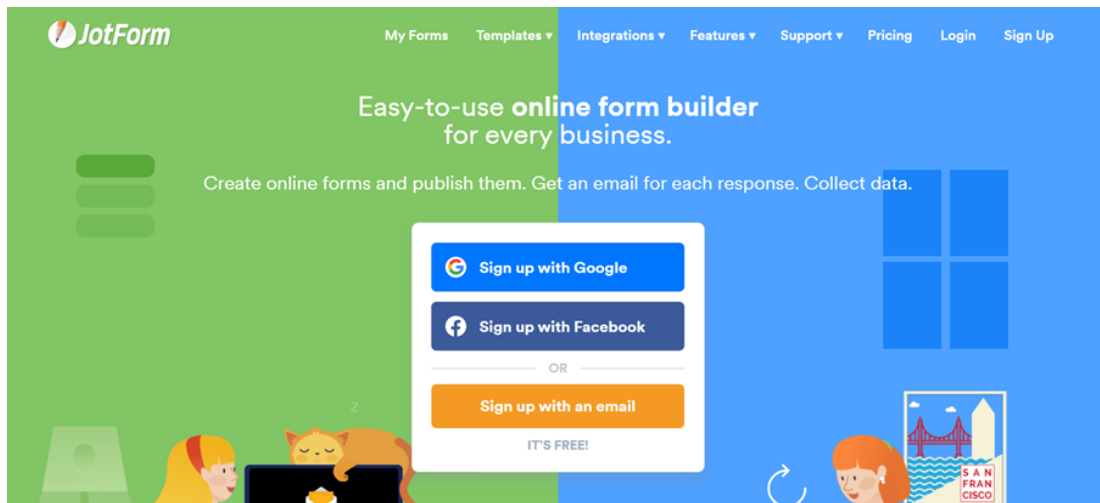
## HOW TO MAKE A COFFEE MENU USING JOTFORM

Step 1
Follow this link to the JotForm page to start making your online order form.
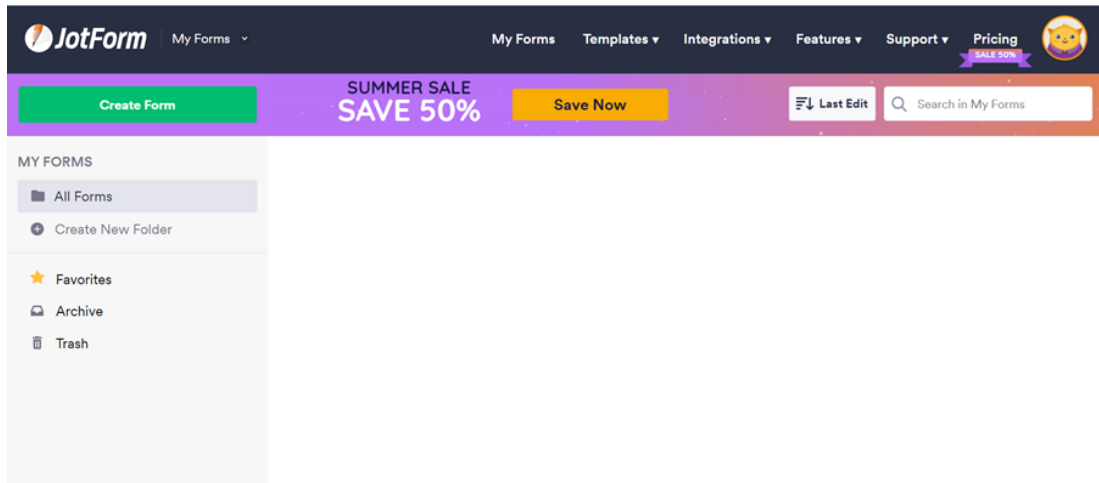https://www.jotform.com/



Step 2
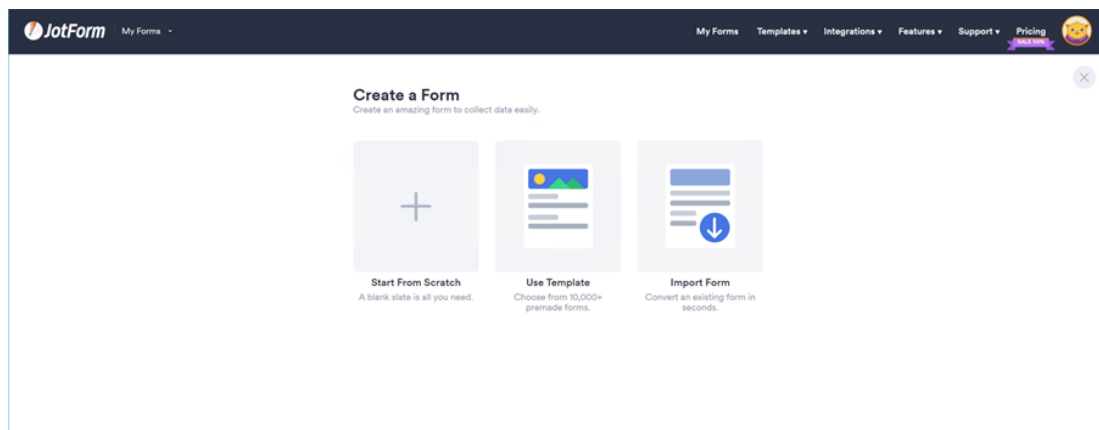Click 'Sign up with an email'.
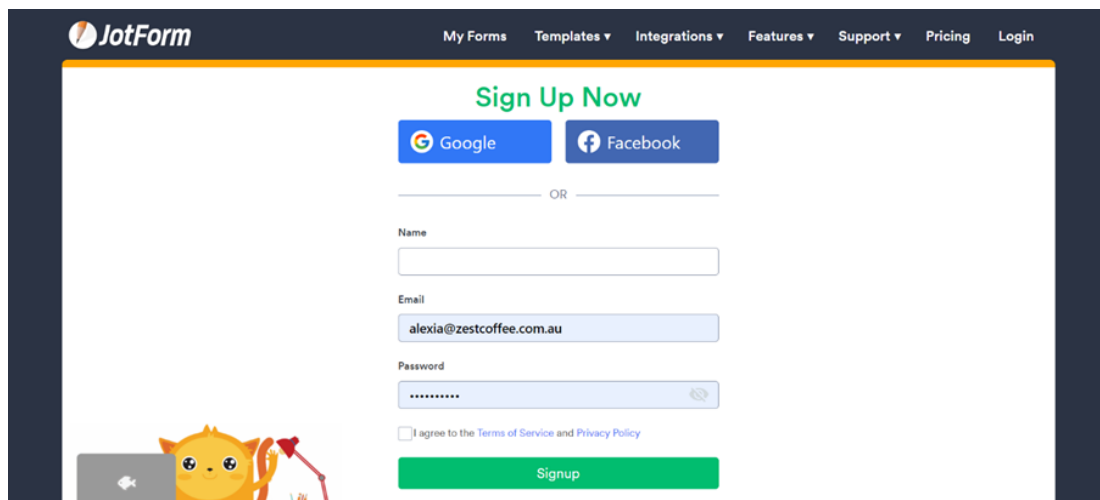
Step 3
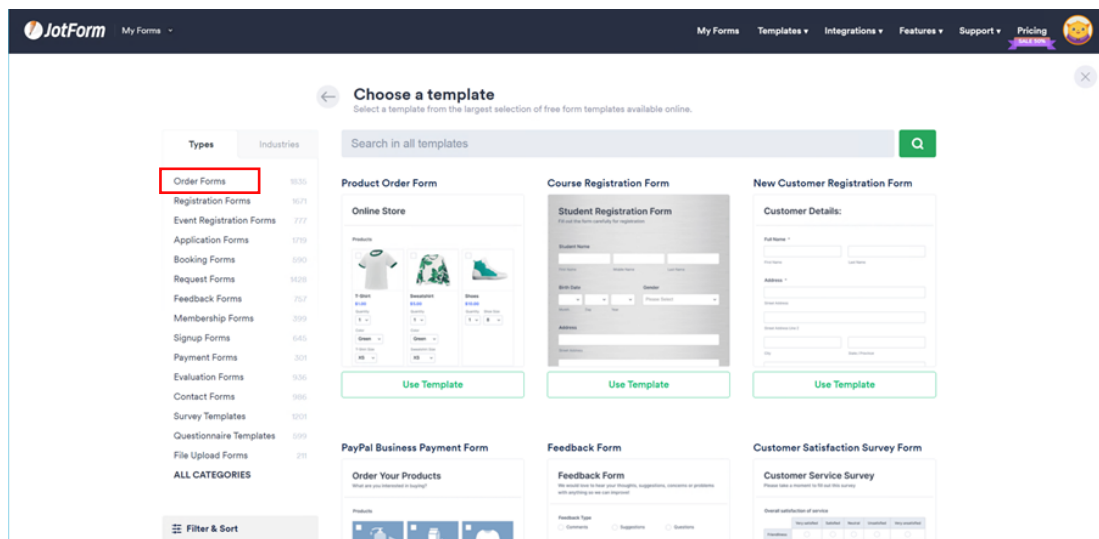Click the green 'Create Form' button in the top left-hand corner.



Step 4
JotForm has some incredible templates, and we're going to use one of them.
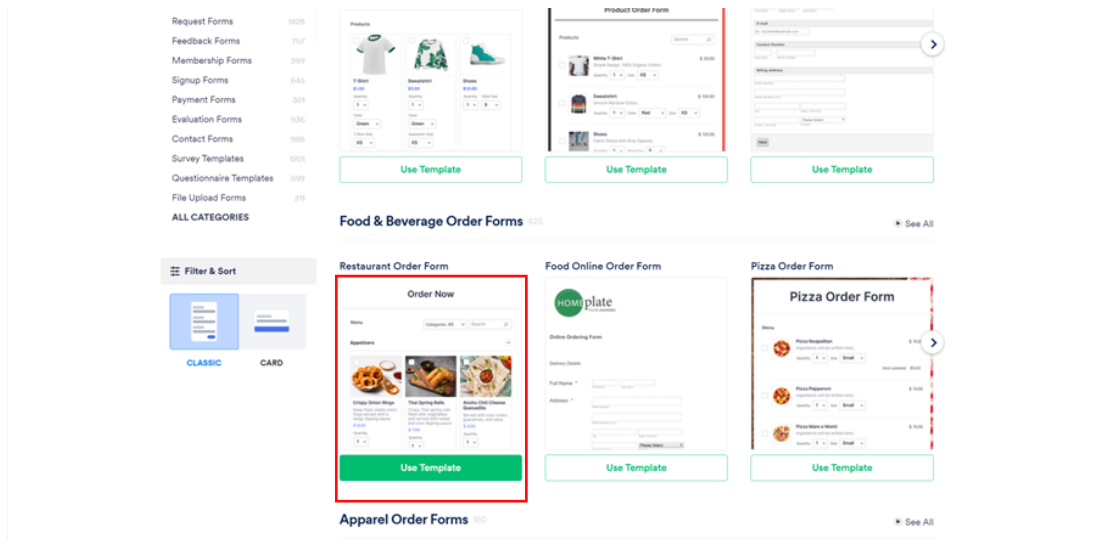Click the 'Use Template' button in the middle.



Step 5
In the 'Types' tab on the left, click 'Order Forms'.

Step 6
Today we are going to use the 'Restaurant Order Form' under the 'Food & Beverage Order Forms' section. Hit 'Use Template'.



Step 7
We are now on the 'BUILD' section of the form. Here we will customise the look of the form and add in our products. Notice that there's another 'SETTINGS' tab and a 'PUBLISH' tab, but we will look at those later.
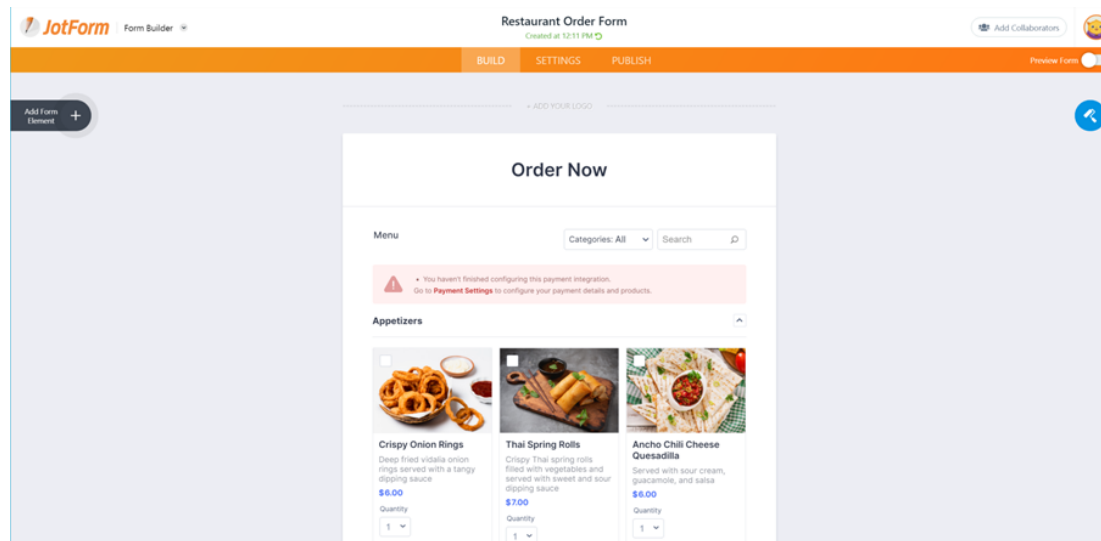


Step 8
First change the 'Order Now' text to a heading that fits your café. For this example, I am going to title my form with my café name: Zest Café, and for the subheader: Coffee Online Order Form.
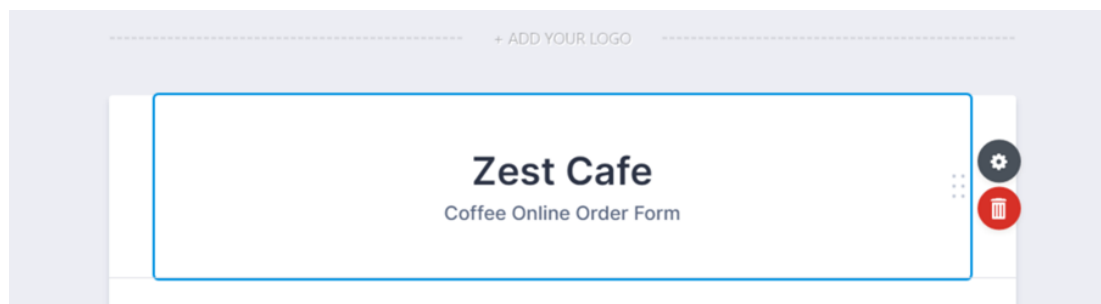
Step 9
Now let's customise the products on our order form. Notice the categories
here, Appetizers, Soups etc. These are great if you are making a full restau-
rant menu and may be applicable to you, but for this demo I am only going to
be adding coffee options, so I am going to remove all the food items and only
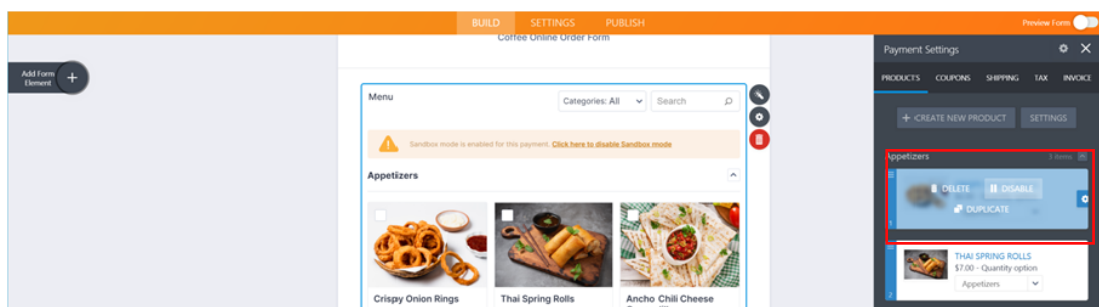leave the 'Drinks' menu.
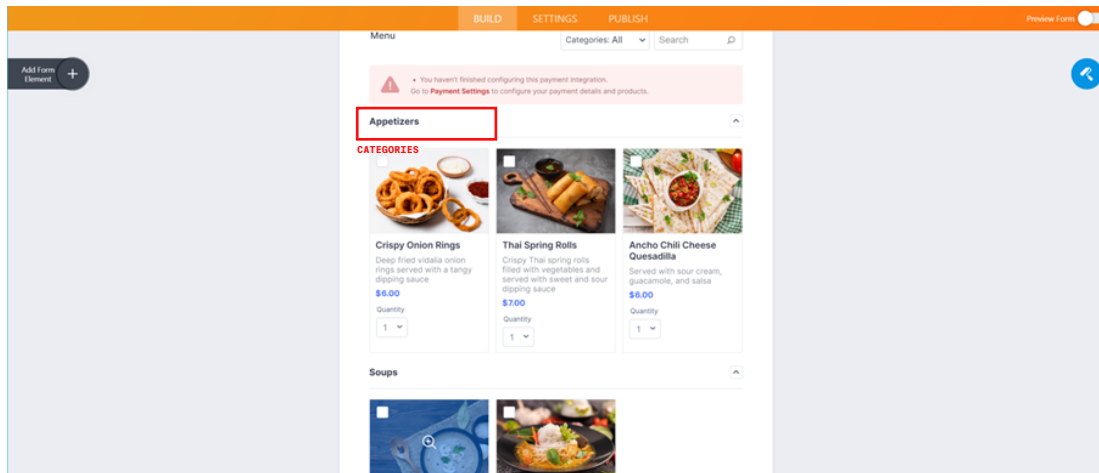


Step 10
To remove a product, click on the image to bring up the editing bar on the
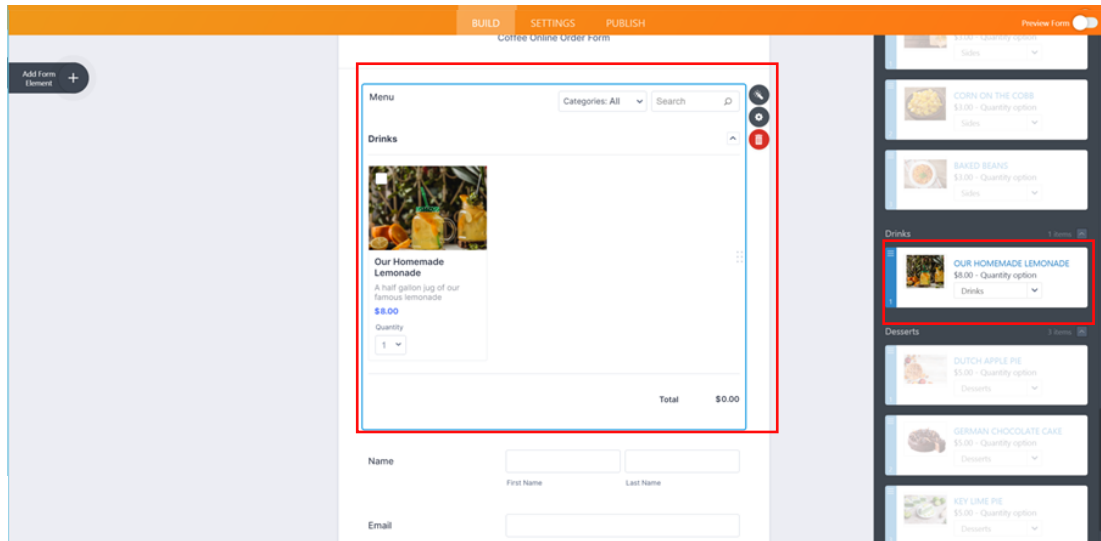right-hand side.
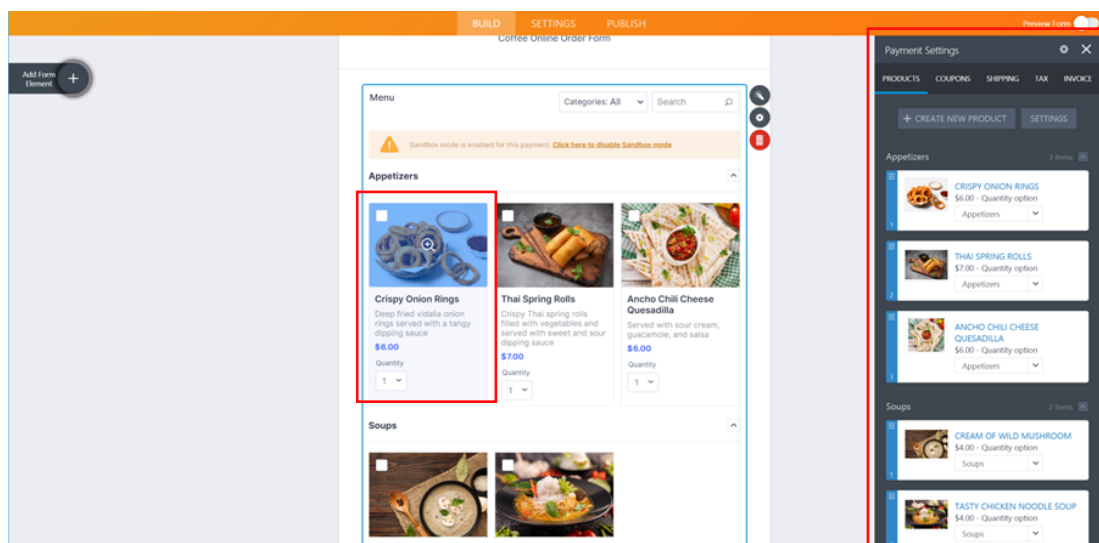


Step 11
Hover over the item you want to remove, and click the cog button to bring up
three options; Delete, Disable and Duplicate. Click 'Delete' to permanently
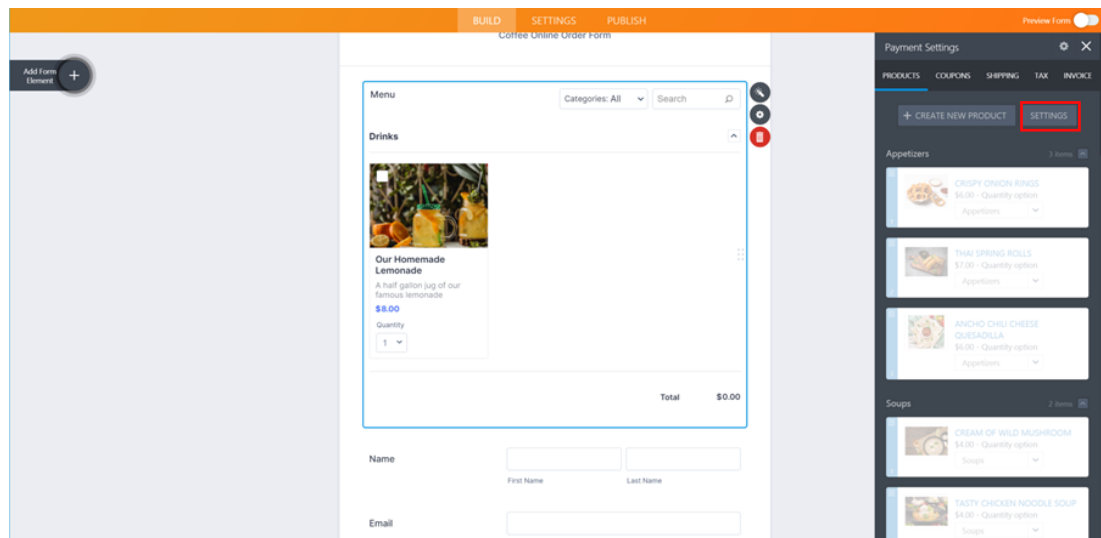remove the item or 'Disable' to hide it for now.

Now I have everything hidden or deleted except one product under the drinks category.
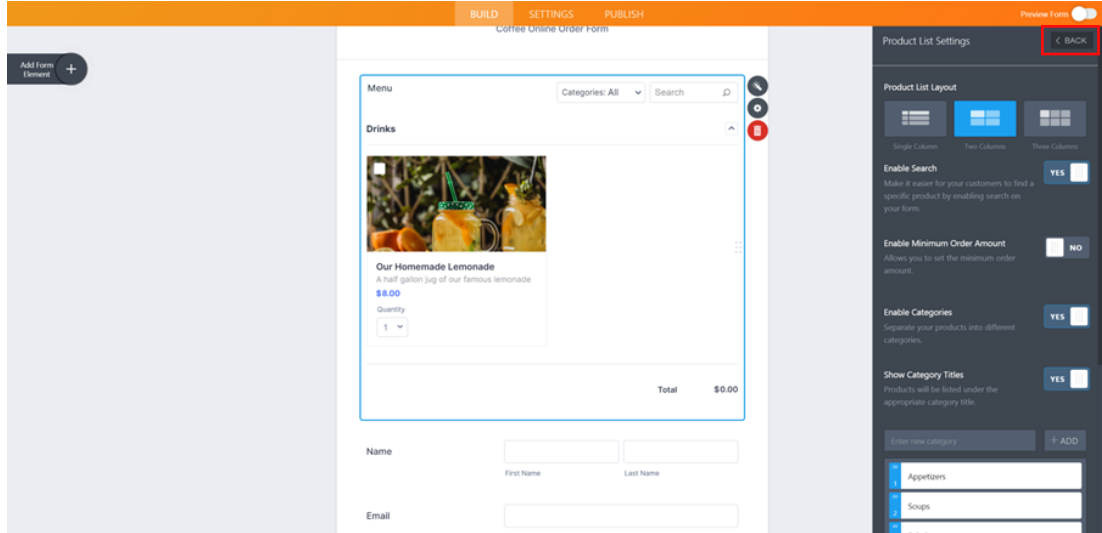


Step 12
Optional Step: Before we customise our drinks menu item, I'm going to make sure my product is selected and then I'm going to click Settings.
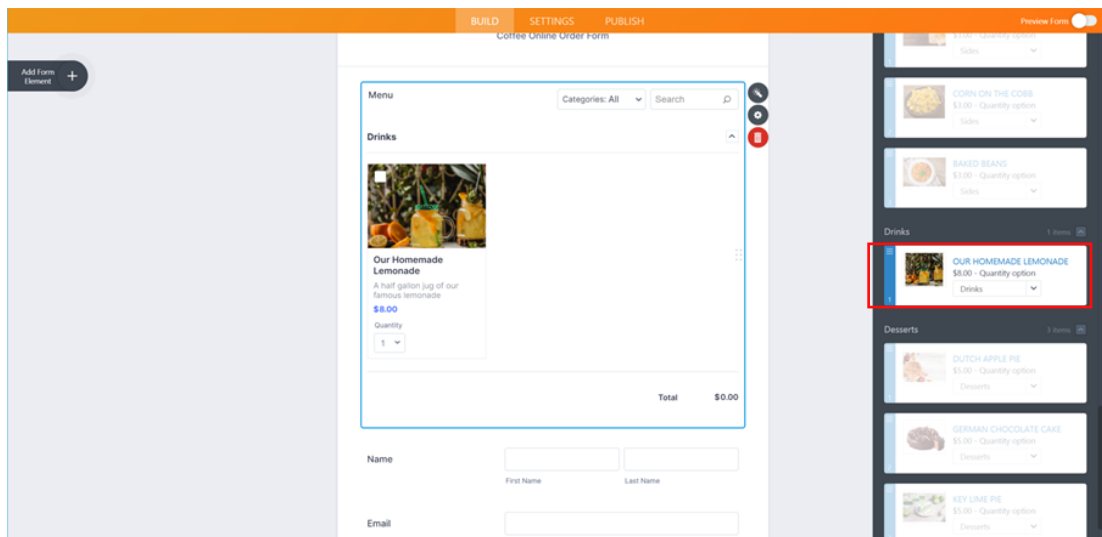
Step 13
Under here I'm going to change the layout to two columns instead of three. You
don't have to do this, it is just to show you the options you have. Take a
read through the rest of the options, you might want to enable a minimum order
amount and hide your categories. I am just going to leave them how they are
for this demo. Note: You can also customise and add categories down the bottom
of the panel.
Finally click 'BACK' in the top right-hand corner of the grey panel to return
to the main menu.



Step 14
From here we will customise this product and duplicate adjusting the pricing
and description for the different sizes of coffees. Hover over the product
tile in the right-hand side panel and click the pencil button to edit.

Step 15:
Here we will customise the name, price, description and product image.

First I have changed the product name to Coffee 6oz and the price to $4. Make
sure you change the USD currency to AUD. For this product, I decided a
description wasn't necessary.
You can upload your own images, I have already got some images uploaded so I
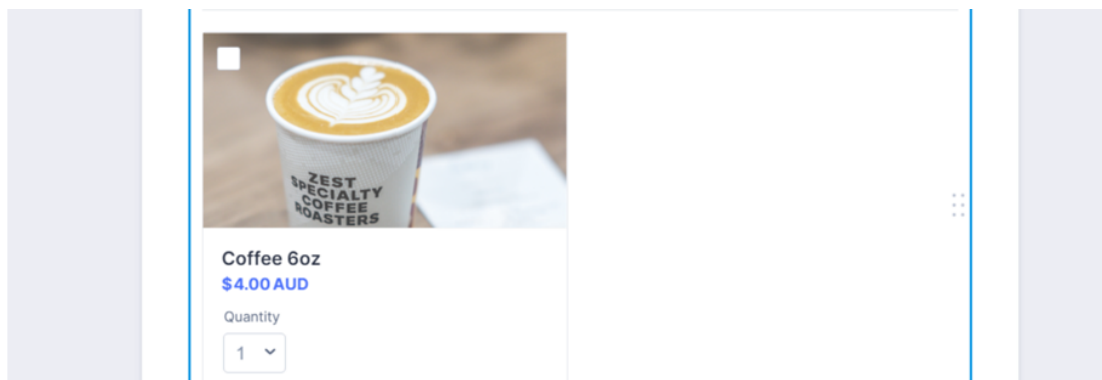am just selecting one from the 'My Images' tab.
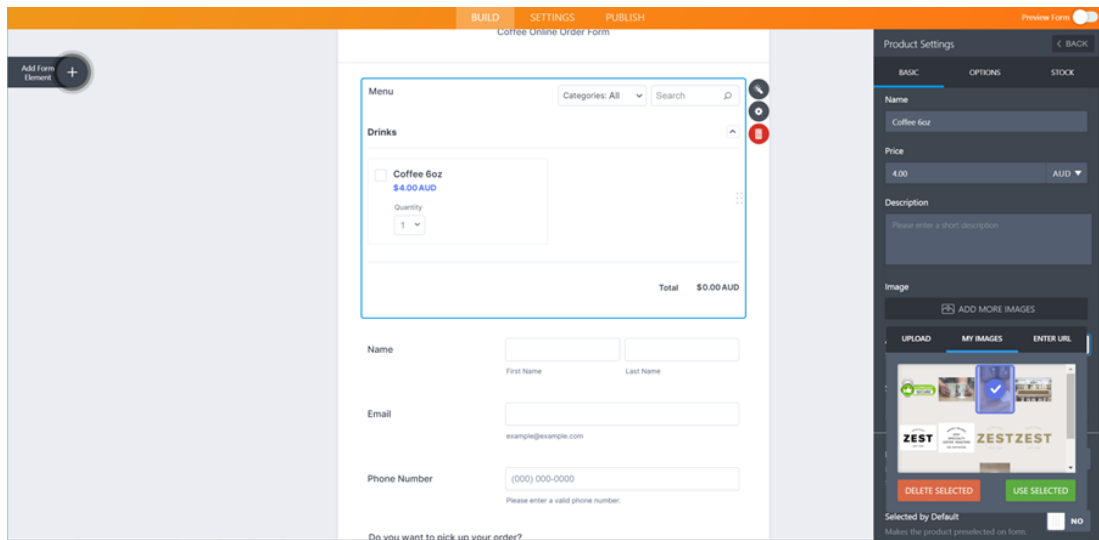


Step 16:
Once you are happy with all the fields hit save to see your changes reflect in
the main order form.
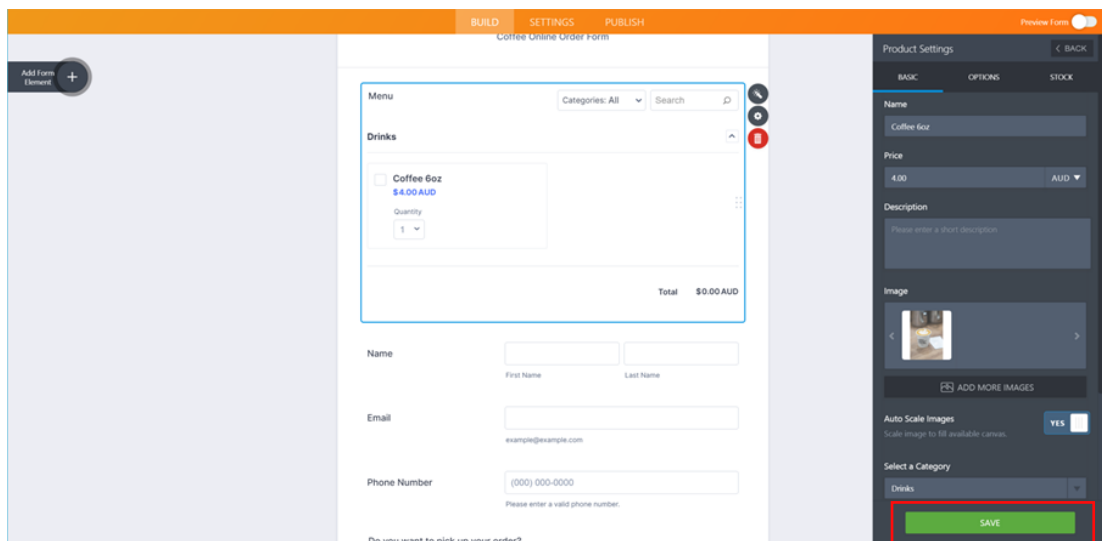


Looking good! Notice how we can select quantity below the coffee, but right
now customers can't choose what kind of milk they would like with their
coffee, so let's add that to our product.

Step 17
Start by clicking 'OPTIONS'. You will see quantity already in here. We want to
add another option so people can choose alternative milks in their coffee, so
click the '+ ADD' button.
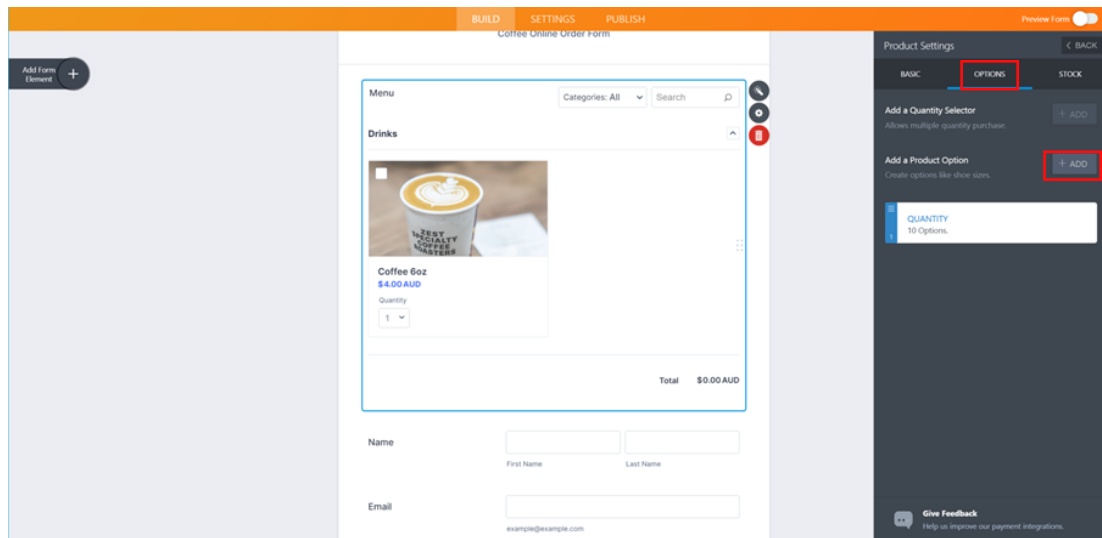


Step 18
Label it Milks and enable, the 'Create Sub Products From Options' toggle along
with the 'Special Pricing Per Option' toggle. This is really good if you want
to charge a little more for alternative milks, which is exactly what we are
going to show you how to do next.
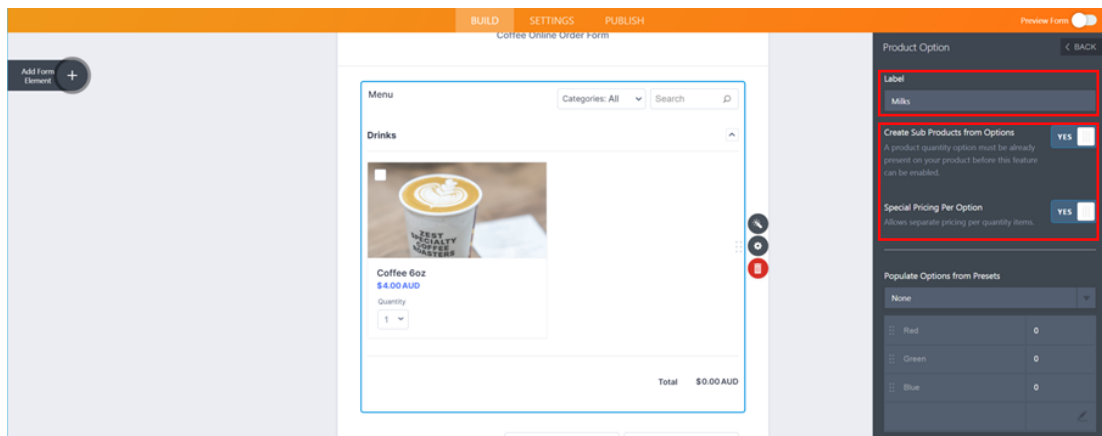


Step 19
At the bottom of the panel, you will see options to fill in your different
types of milk. Here I have chosen Cow's Milk, and left it at the standard
price then I have added Almond, Oat and Soy and I have added an extra 50c for
these milk options. You will see your updates reflecting on your main order
form! Now hit 'BACK' to return to the main menu.
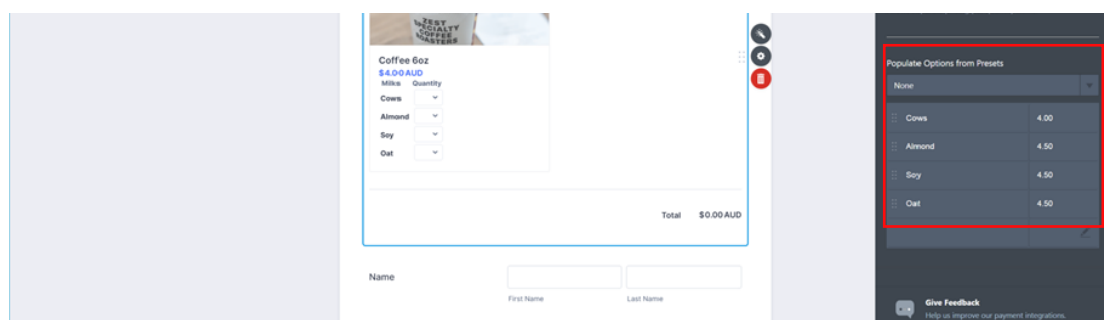
Step 20
Hover over the product you just made and click the cogs button to bring up the
Delete, Disable and Duplicate options, this time click 'DUPLICATE' to make
another coffee item.
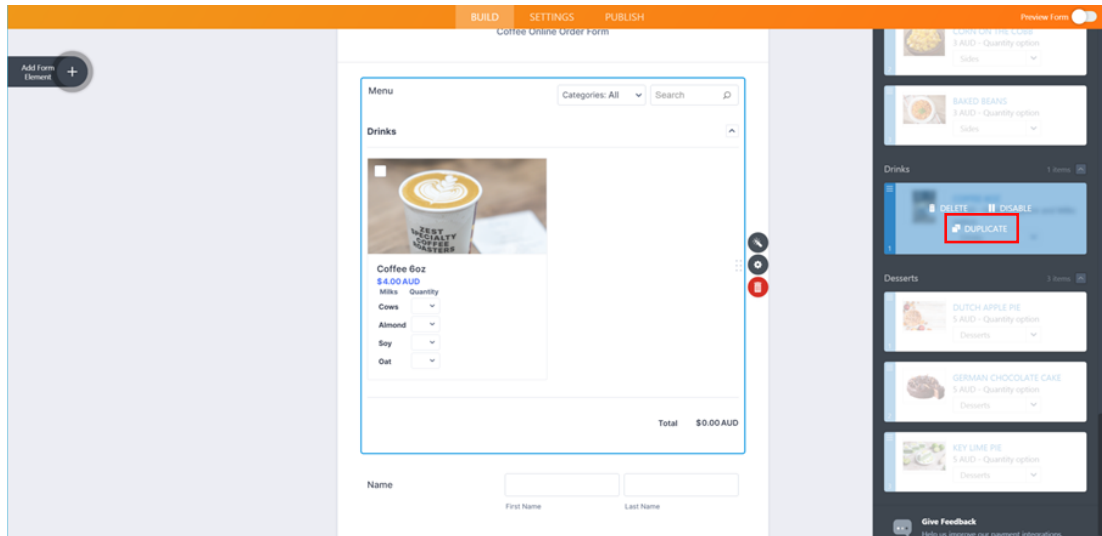


Step 21
Now it's time to make more products to complete our menu. This time we're
going to make a medium sized coffee called: Coffee 8oz, and a large sized
coffee called: Coffee 12oz. To do this, hover over the duplicated product tile
in the right-hand side panel and click the pencil button to edit the new
product. Follow the previous steps 15 - 19 to change your products name and
pricing. For your milk options you will need to go into options as before and
update the prices for each item.
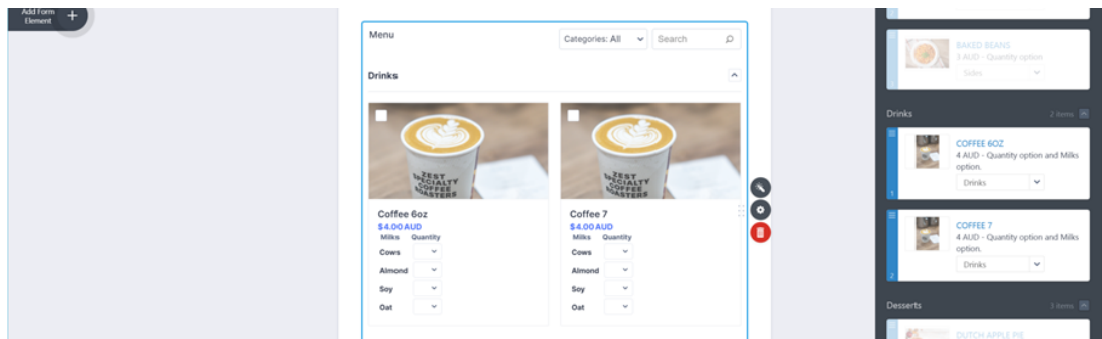


Take a look at the completed menu below, where all the pricing increases with
the product size.
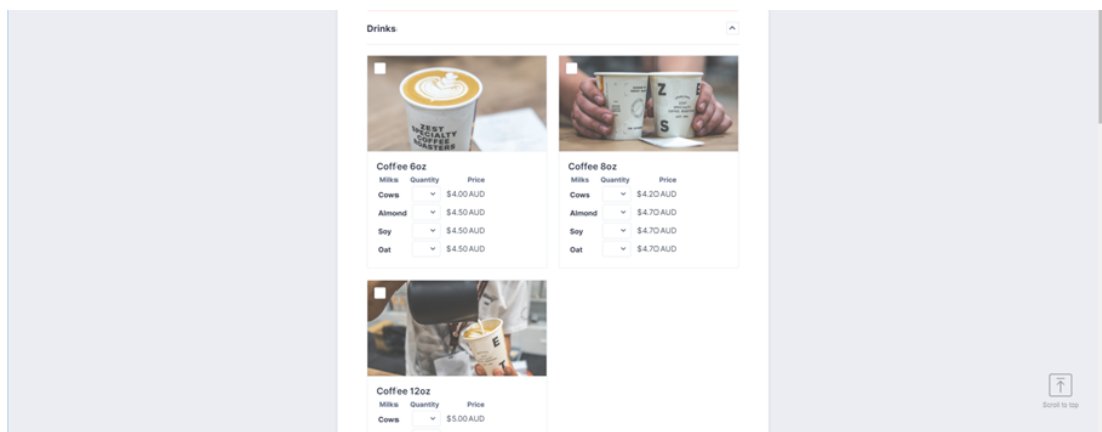
Step 22

Now you may have noticed a notification like the one showing on my screen,
notifying you about payment settings. To do this, click the link on the
notification or head to the right-hand side panel and click the cog next to
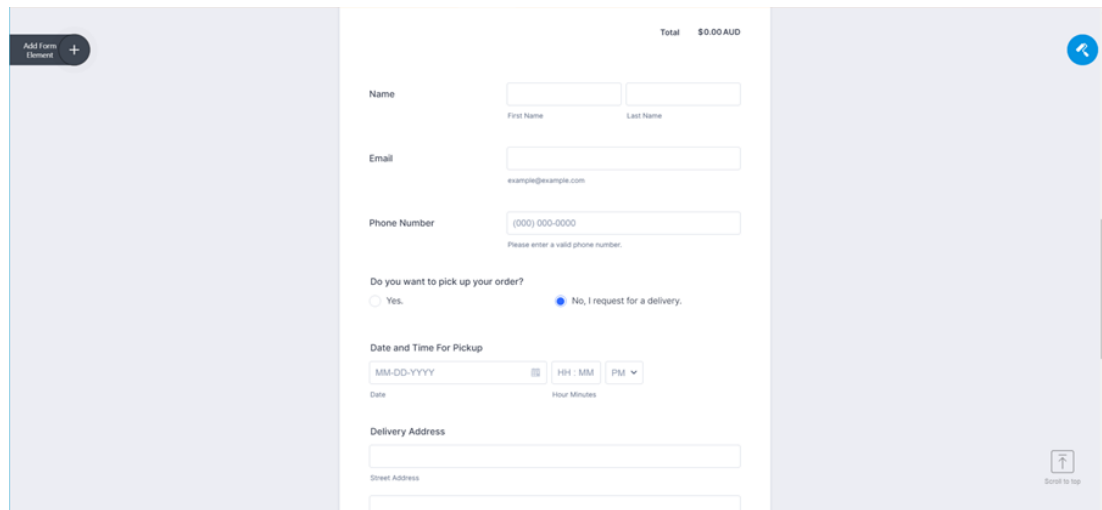'Payment Settings'.
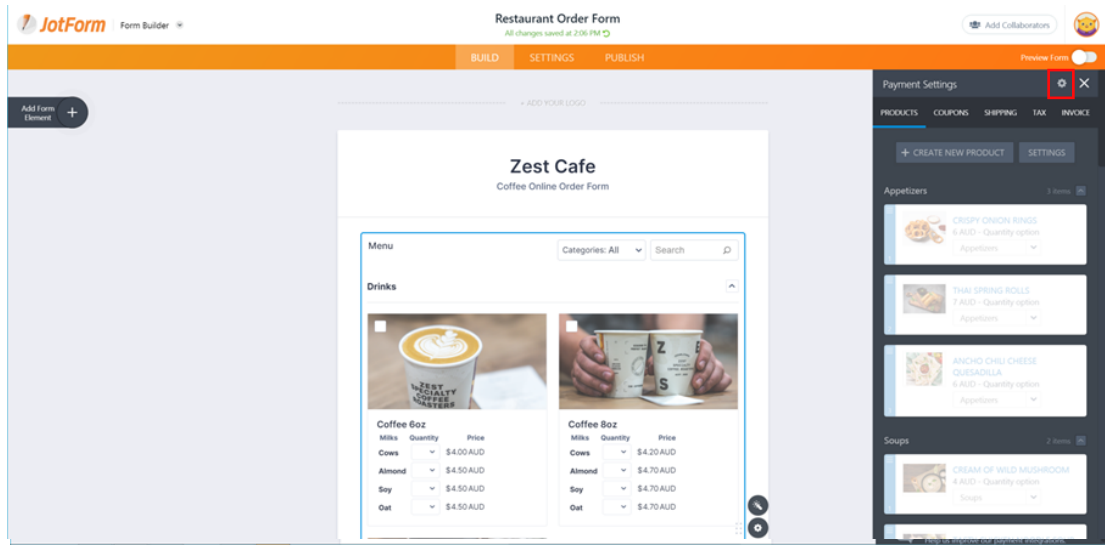


Step 23

We find connecting PayPal to be the easiest option. Due to the nature of
information, PayPal requires, we can't show you the exact steps here, but
follow their prompts to set up your PayPal, this will make it easy for your
customers to pay you in advance for their orders. Make sure the mode is on
'Live Mode' and the currency is the Australian Dollar (AUD). We also encourage
you to toggle down the 'Additional Gateway Settings' and configure these to
your preferences.
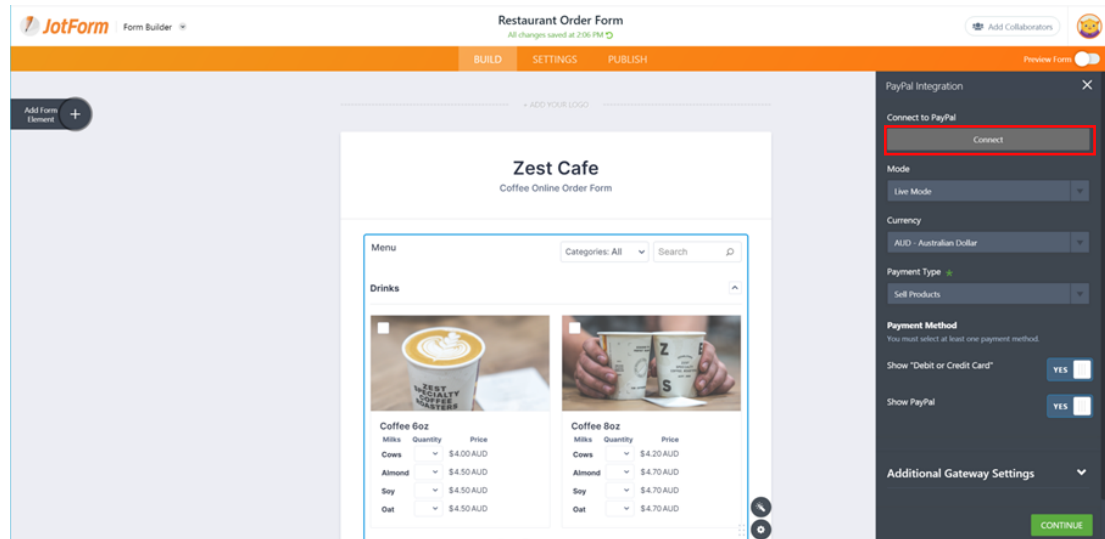
Step 24
Moving on from products, scroll down to look at the rest of your order form.
Included are essential fields like 'Name of Customer' and their email and
phone number etc. There might be a field you'd like to remove like the option
to deliver the customer's order, to do this, simply click on the section and
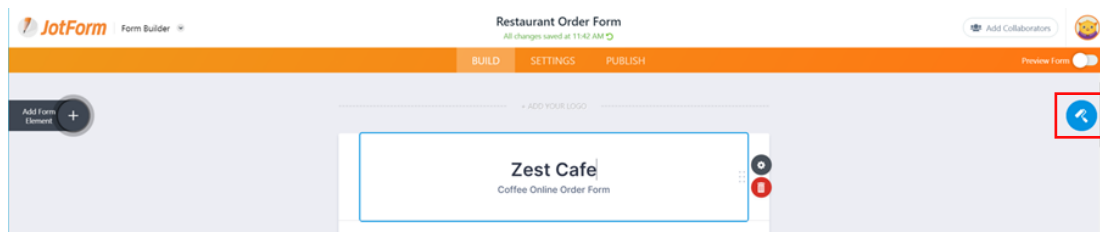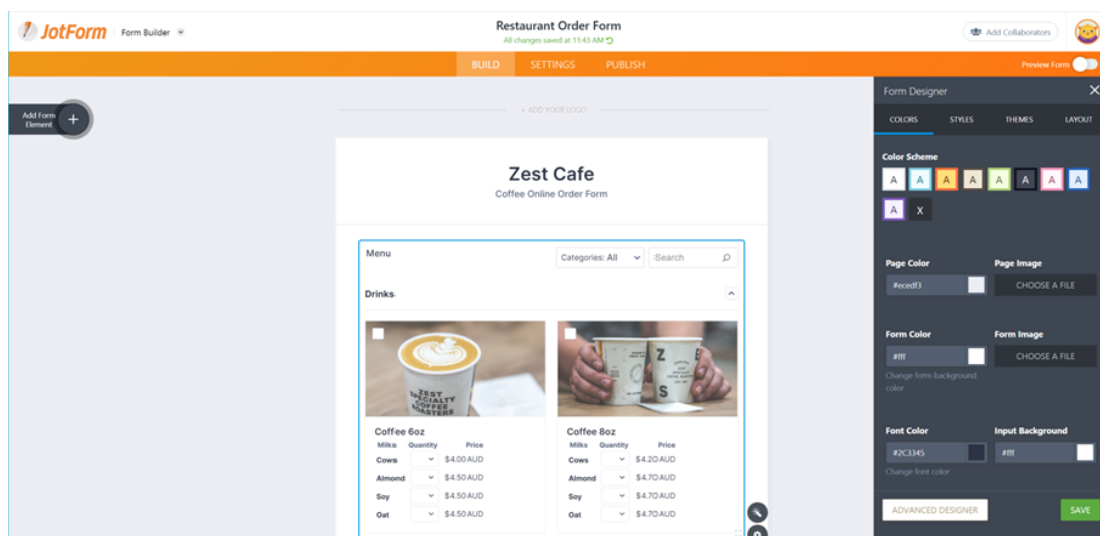hit the red trash can button to remove it.



Step 25
Now let's look at customising the look of your form. Grey not your colour? Not
a problem! You can customise the look of your form by clicking the blue paint
roller button on the right-hand side.



Step 26
Here you will have the option to choose a colour scheme or alter the page and
form colours to your own liking. We recommend choosing colours that reflect
your café's branding or atmosphere.
Down the bottom you will see the 'ADVANCE DESIGNER' button where you can edit
loads more, including fonts, background images, form layout, form cover, label
styles and more.

Step 27
Here you will have the option to choose a colour scheme or alter the page and
form colours to your own liking. We recommend choosing colours that reflect
your café's branding or atmosphere.
Down the bottom you will see the 'ADVANCE DESIGNER' button where you can edit
loads more, including fonts, background images, form layout, form cover, label
styles and more.

Enjoy customising your form to make it unique and suited to your café. To
return to the main builder, click the pencil button in the top left-hand
corner.
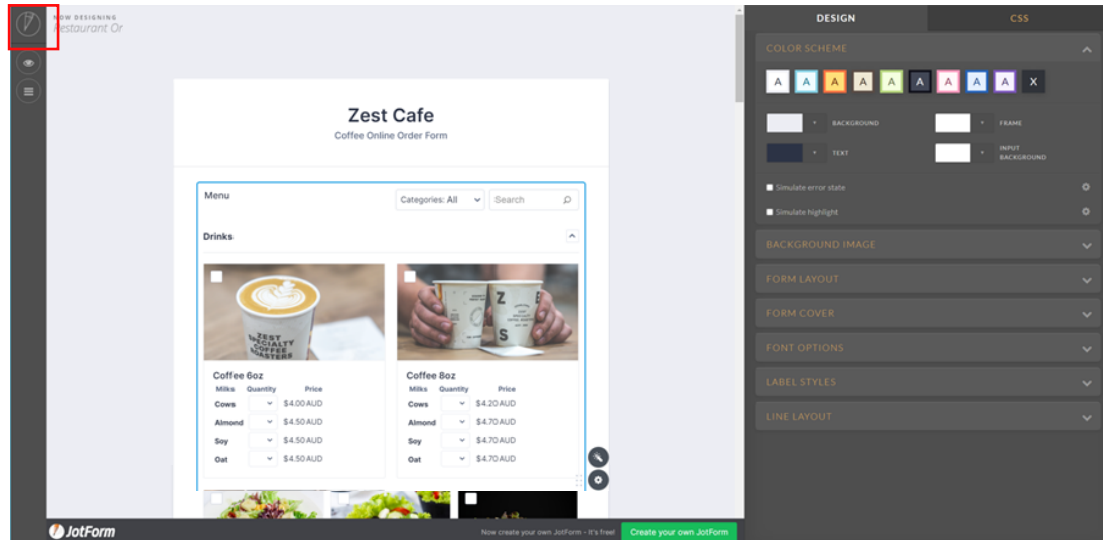


Step 28
Congrats you are finished building your form! Let move onto 'SETTINGS'
First change your title to something relevant like 'Coffee Order Form' or
'Online Menu'. Make sure the form status is enabled.
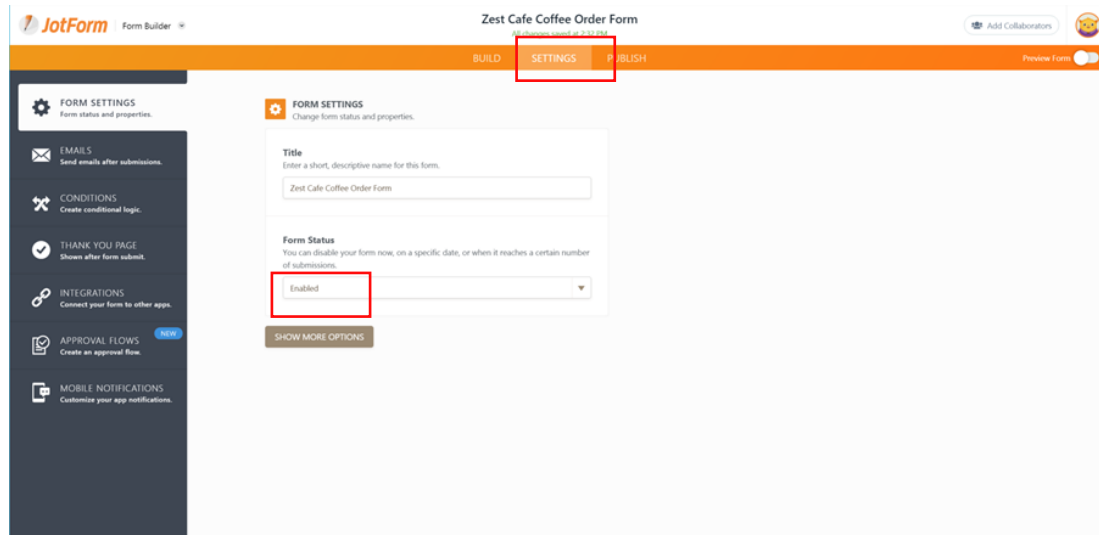
Step 29
Click the 'EMAILS' tab on the left-hand side. Here you will see two emails
already set up with the email address you signed up with. This is the beauty
of templates!
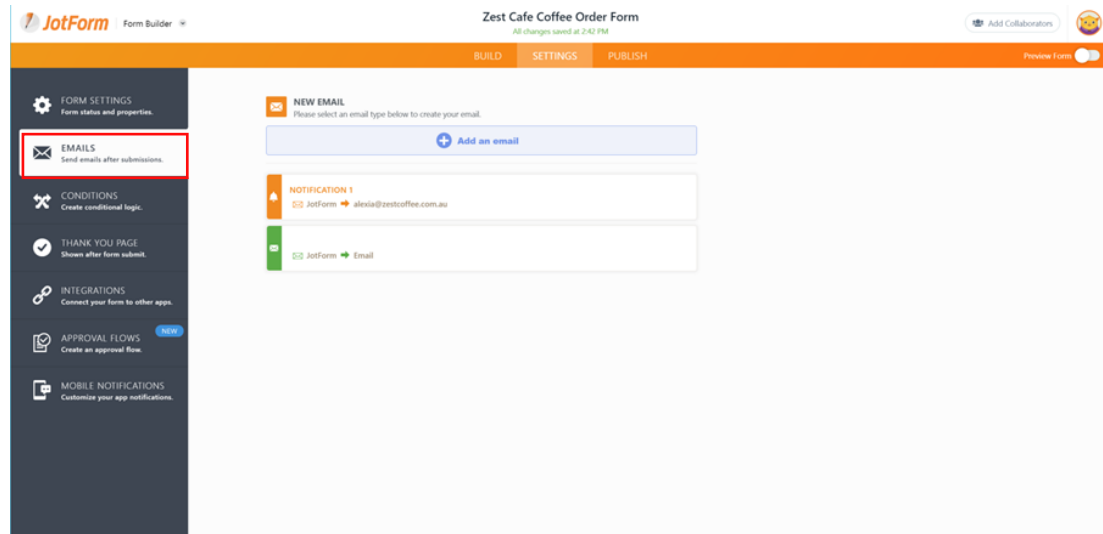


Step 30
Click on the emails to see the details. Here you will see that the email will
take the order information from the order form and send it to you. It will
also send a separate email to the customer confirming what they have ordered.
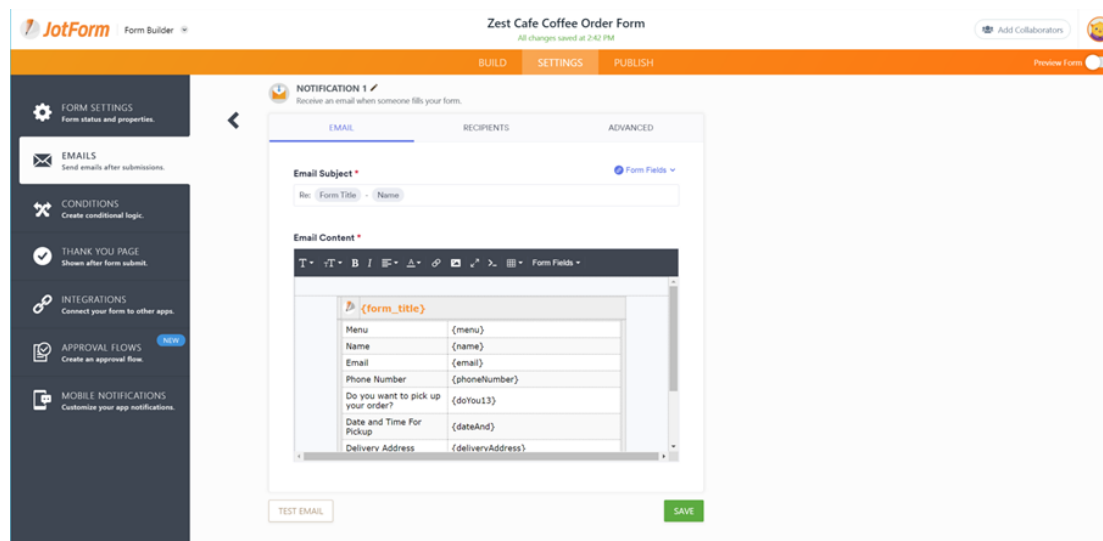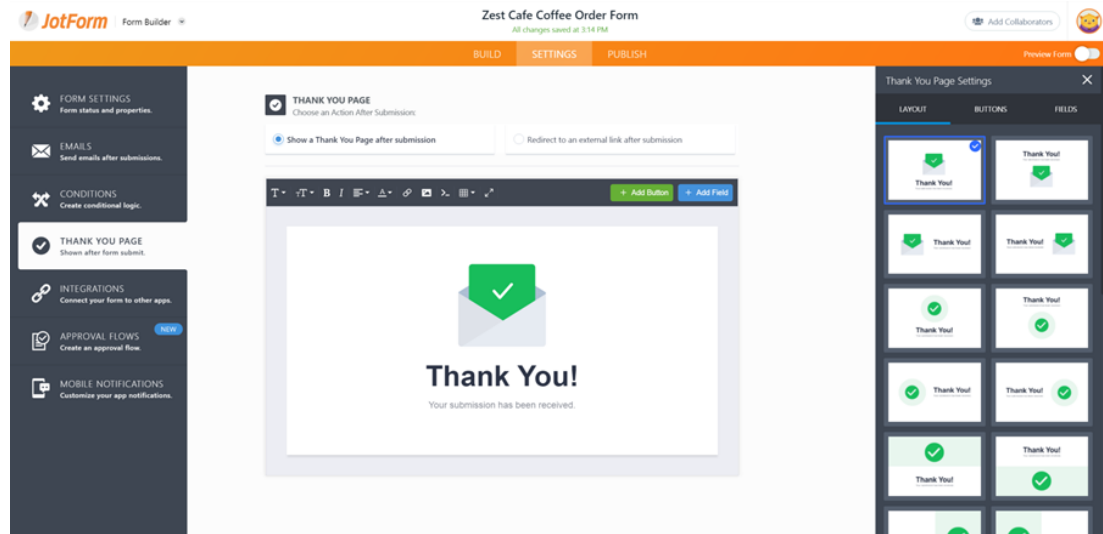


Step 31
Explore the 'CONDITIONS' tab, here you will see that, the delivery address is
conditioned to only show if the delivery button on the form is selected. This
is of course optional. It can get quite complicated setting up conditional
logic, but we believe that the template does a good enough job for this demo
so we will just leave it as is.
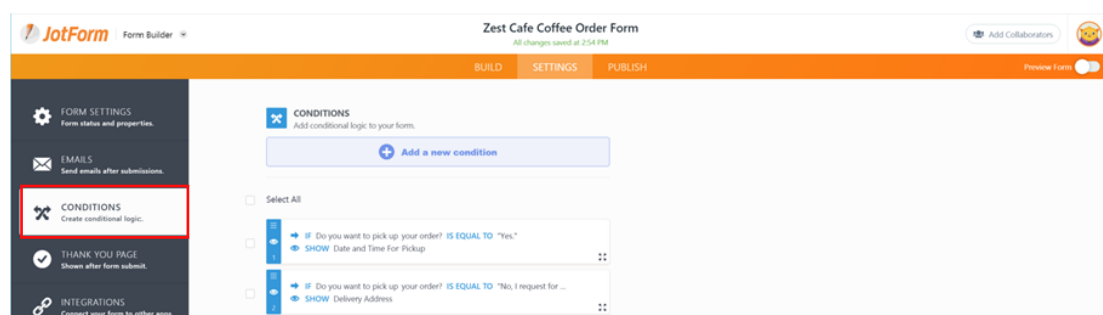
Step 32
Moving down on the 'THANK YOU PAGE', you have the option to customise what
your customers see after they have submitted a page. Notice at the top of the
page that you can choose to either show this page or choose to redirect them
to another page, back to your website perhaps? Simply copy and paste your URL
into the box provided. For this demo we are going to change the image on the
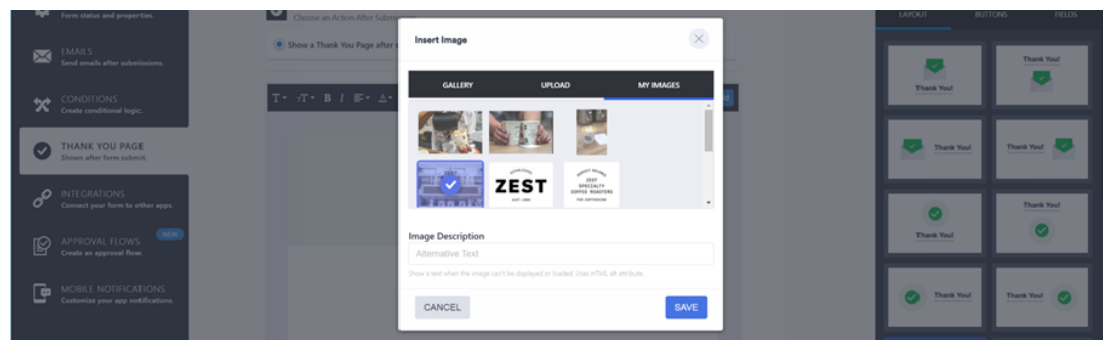page JotForm has provided.



Step 33
First I'm going to choose this layout and change the picture by clicking on
the green area.
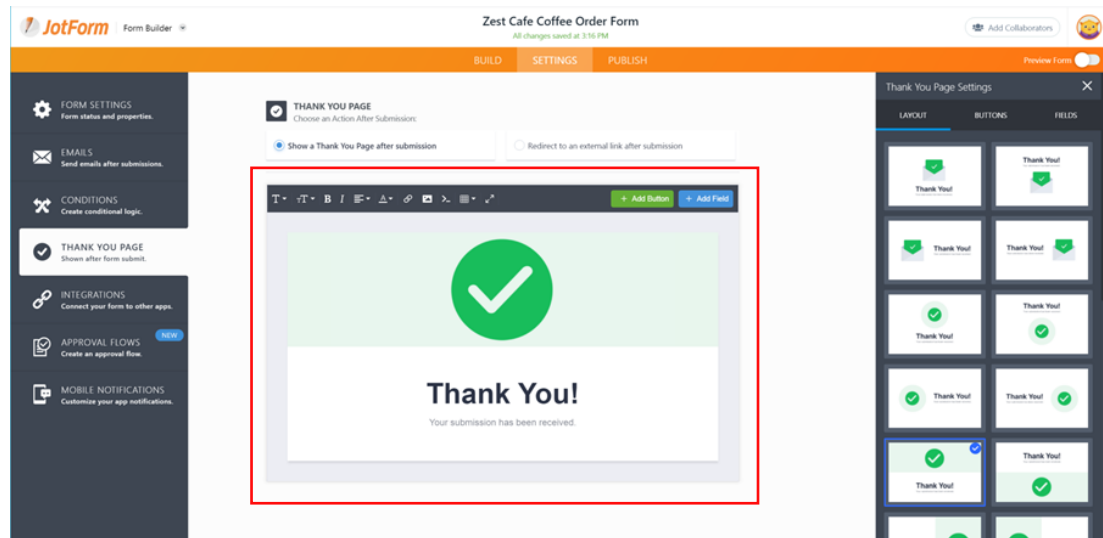


Step 34
Here I am replacing it with an image I uploaded earlier. If you don't have any
pictures uploaded, go to the upload tab or choose from JotForm's gallery of
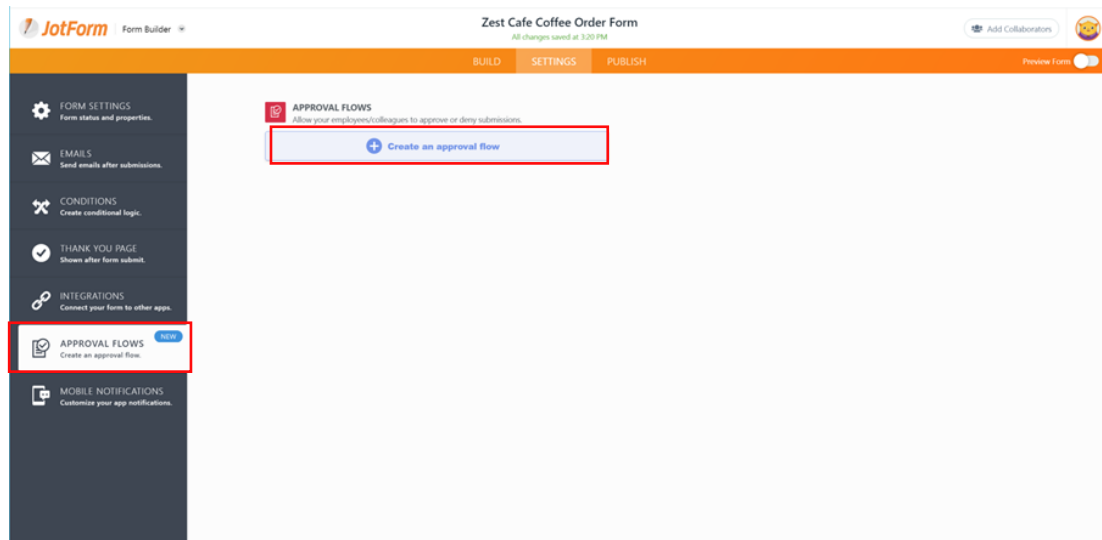free images.

Step 35
Depending on your digital set up, you might want to integrate some other apps
to JotForm, here you see PayPal is already integrated and that is all we need
to have this form up and running.
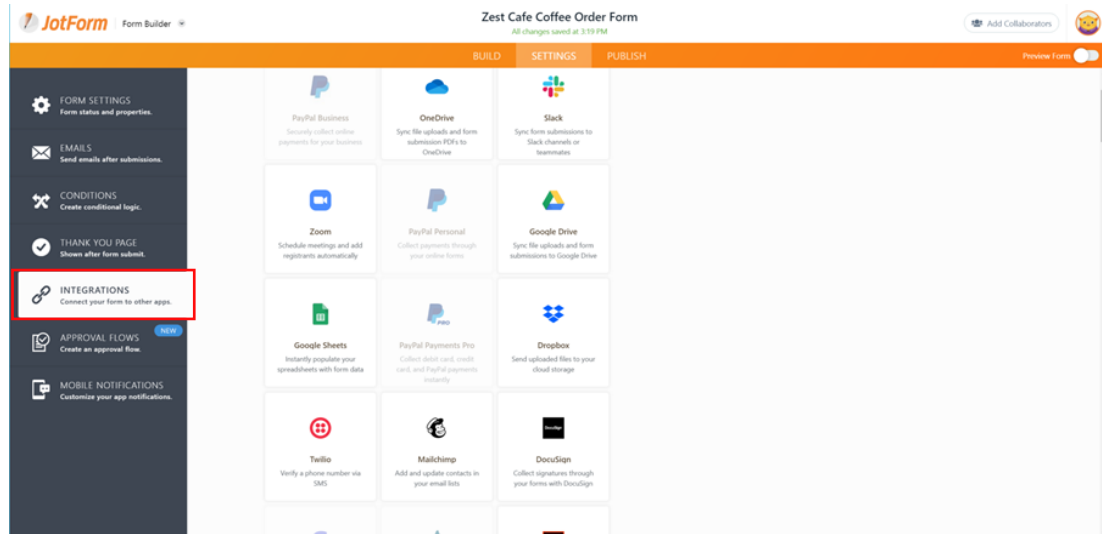


Step 36
Finally, click on the 'APPROVAL FLOW' tab on the left-hand side. Click the
'Create an approval flow' button to start.

Step 37
You will be redirected to this automatic approval flow that comes with the template. As you can see the customer enters a form, an email is sent to the email address you signed up with the request to approve the order. Whether you approve or deny the order, an email will be sent back to the customer. A great way to control your order flow and to avoid taking orders for items you may have run out off or orders placed after business hours!



Step 38
To return to the main builder toggle the arrow next to the JotForm logo in the top left-hand corner and click on the 'Form Builder' tile.
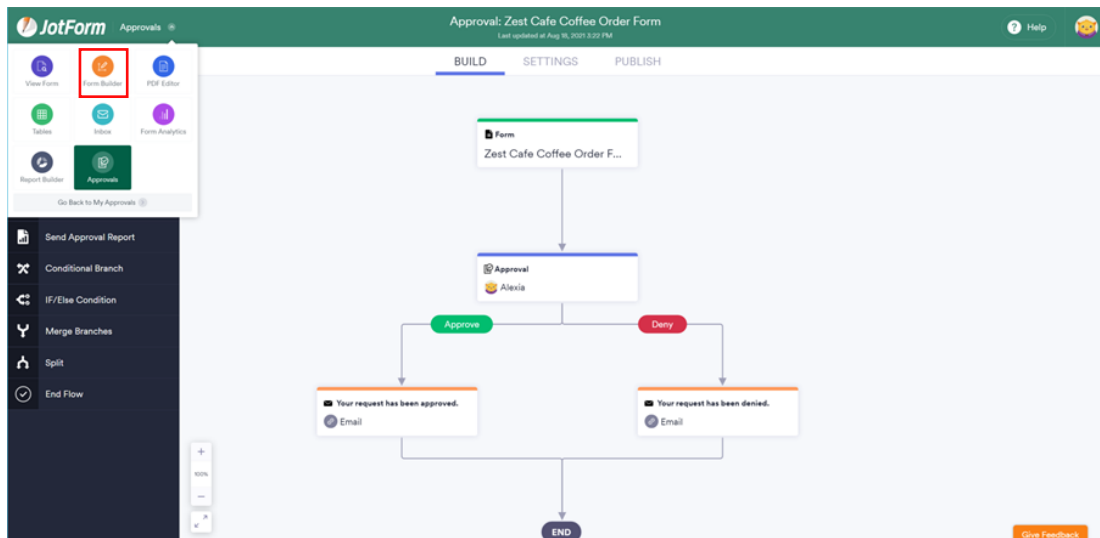
Step 39
The last step is to publish your form, you can do this in several ways. First you can copy the link and paste it in your Instagram bio. You can also invite someone to fill out the form via email.
If you have a website, head over to the embed tab on the left-hand side to copy the code and embed in your website. Don't know how to do this? Speak to your web designer or email info@zestcoffee.com.au and we'll help you over the phone!