

ESTABLISHED

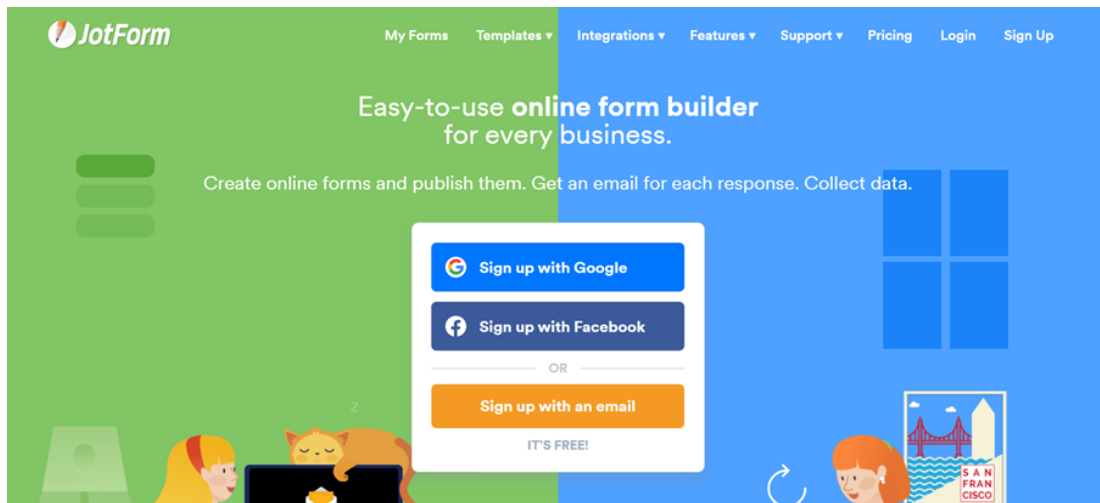
ZEST

AUST. 2009

TUTORIAL / HOW TO MAKE A COFFEE MENU USING JOTFORM

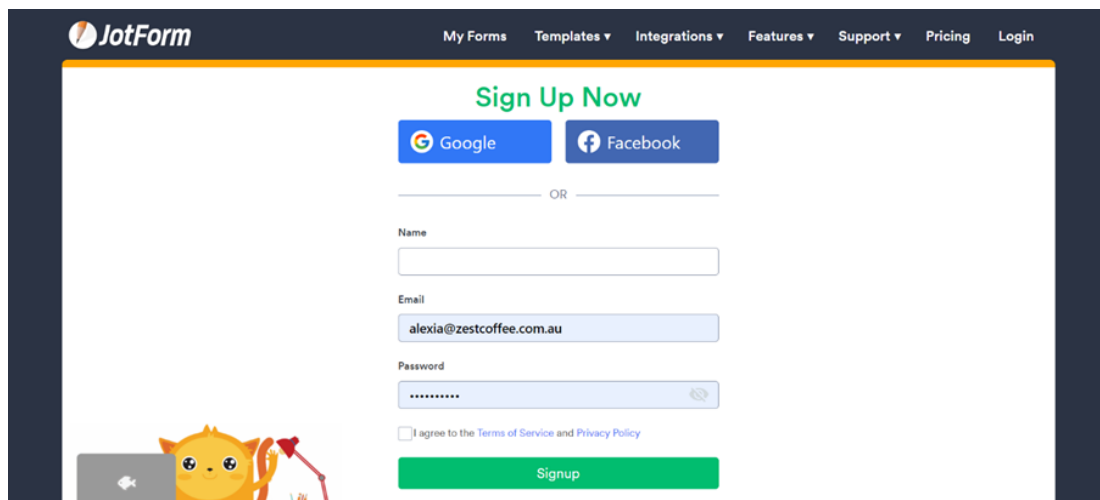
Step 1

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



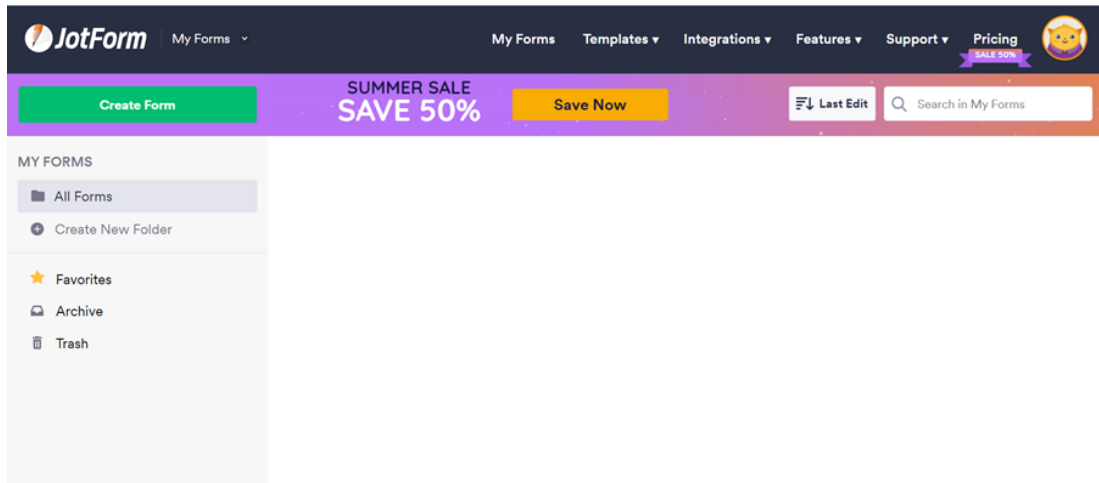
Step 2

Click 'Sign up with an email'.



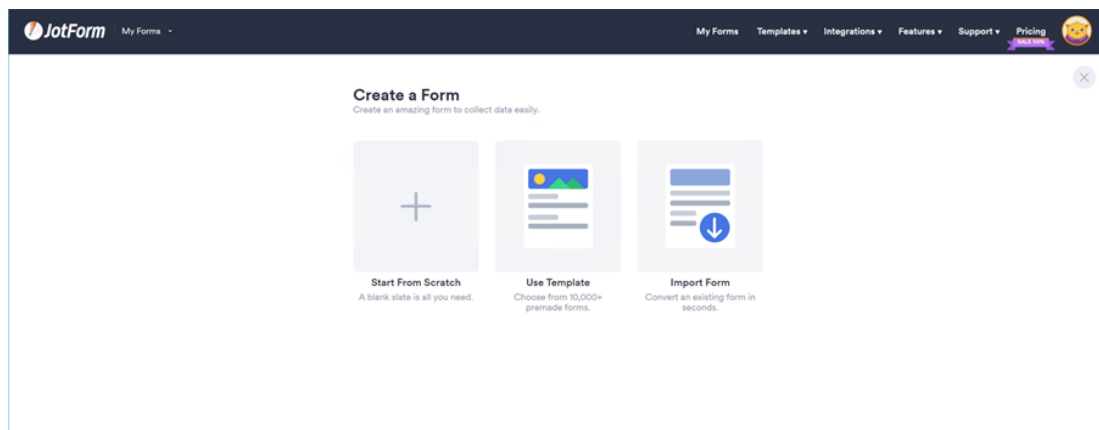
Step 3

Click the green 'Create Form' button in the top left-hand corner.



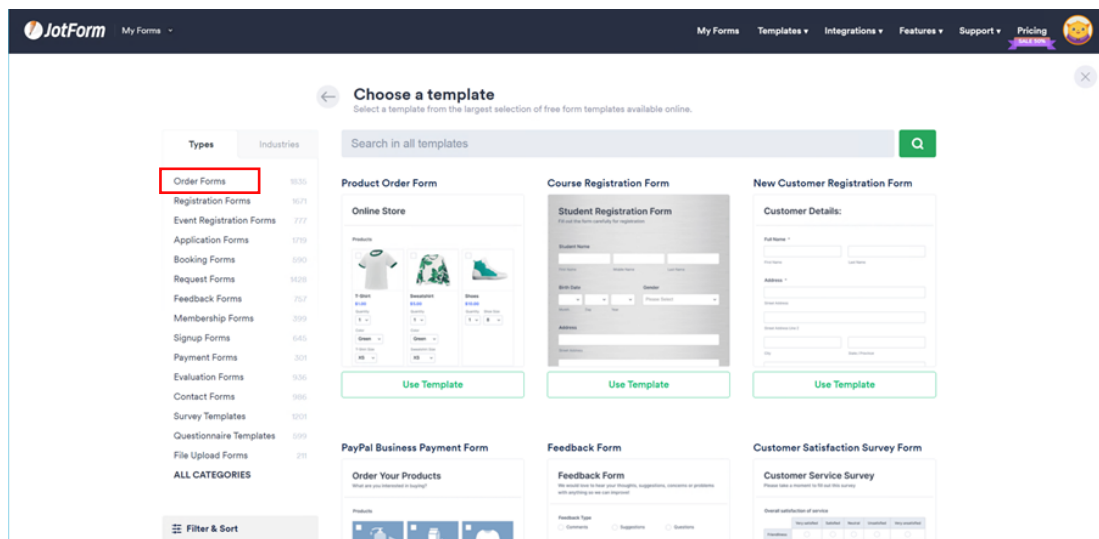
Step 4

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



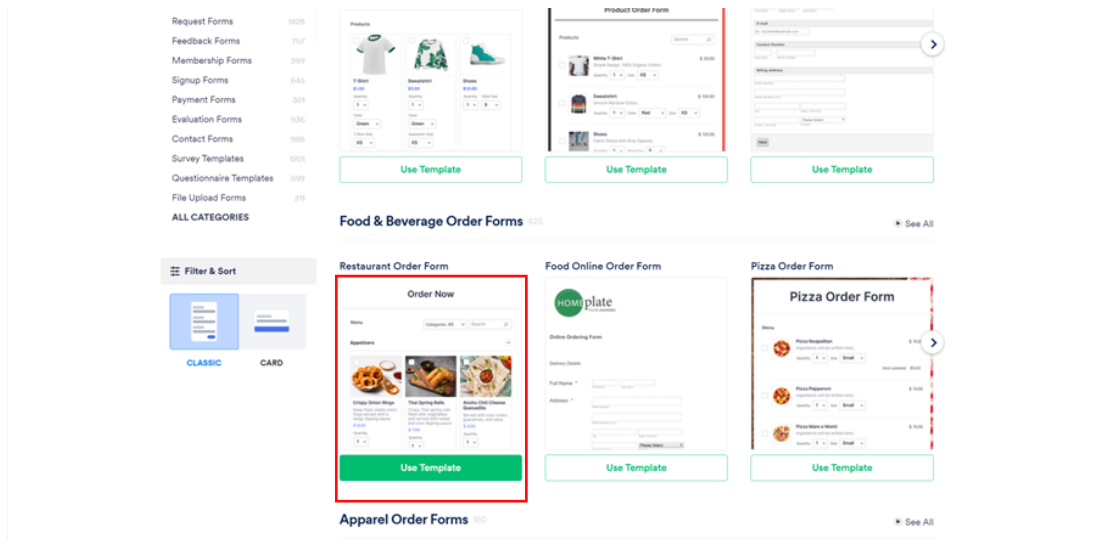
Step 5

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



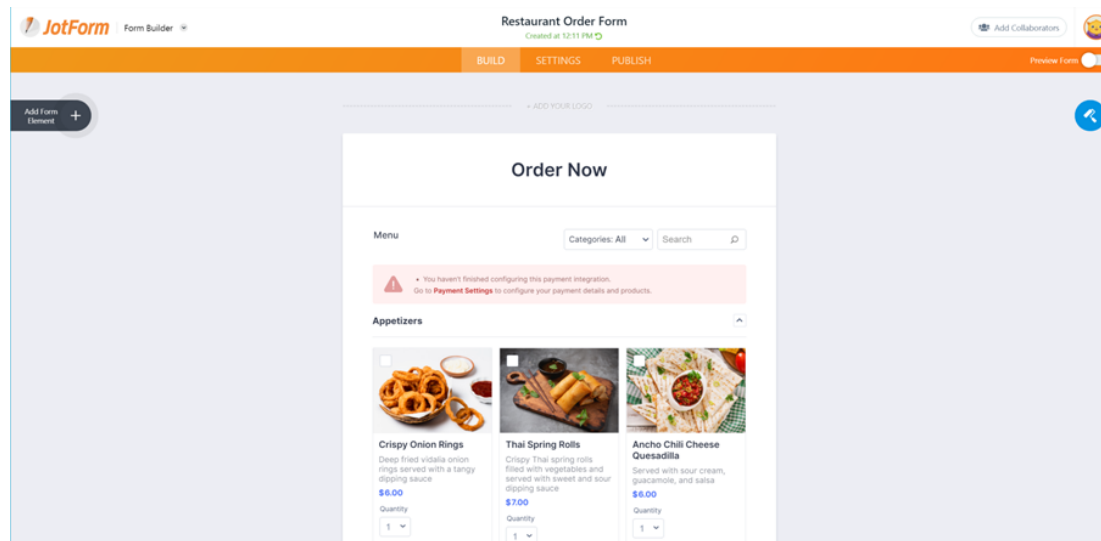
Step 6

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



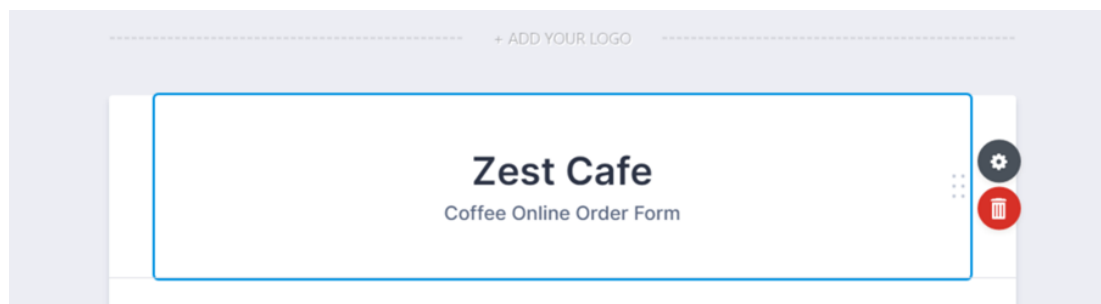
Step 7

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.



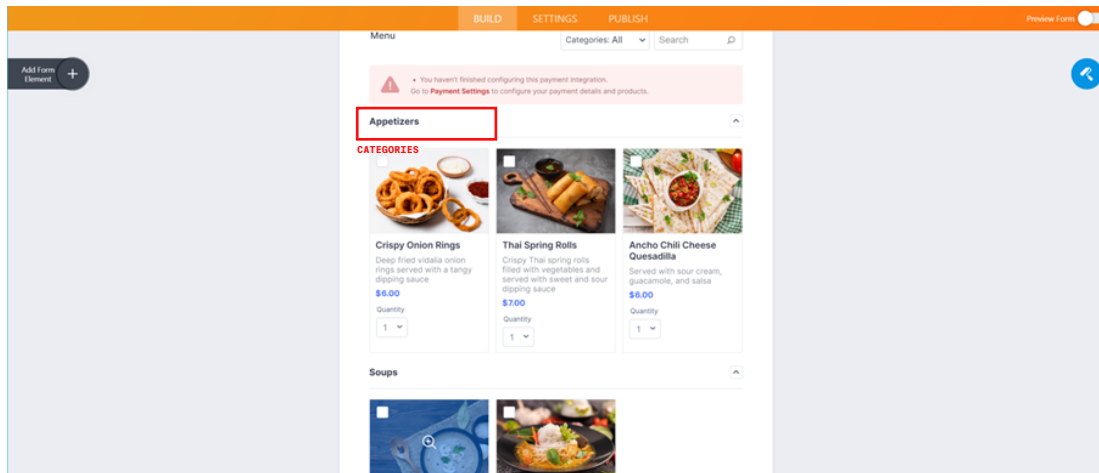
Step 8

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.



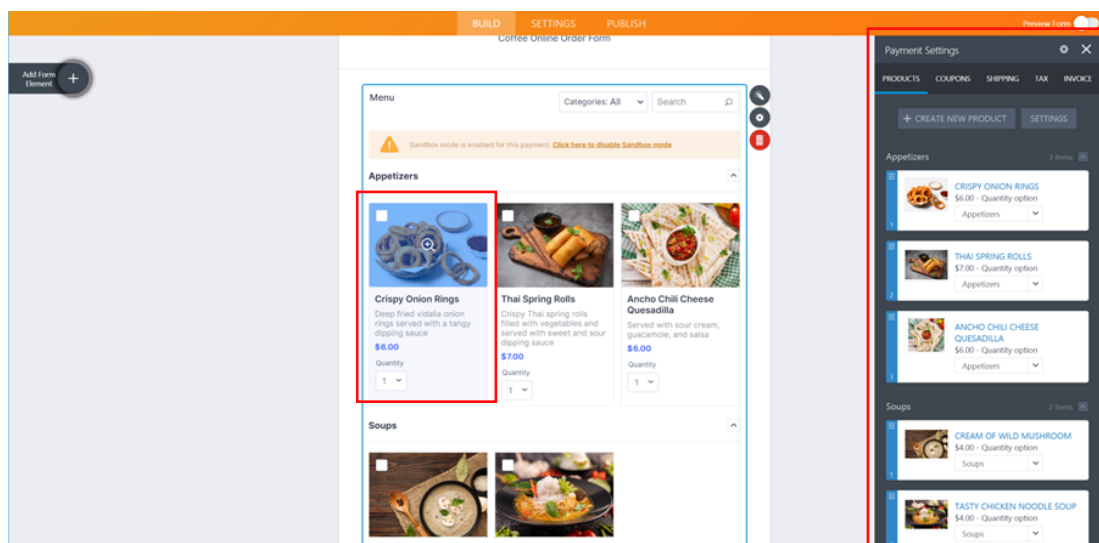
Step 9

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 restaurant 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.



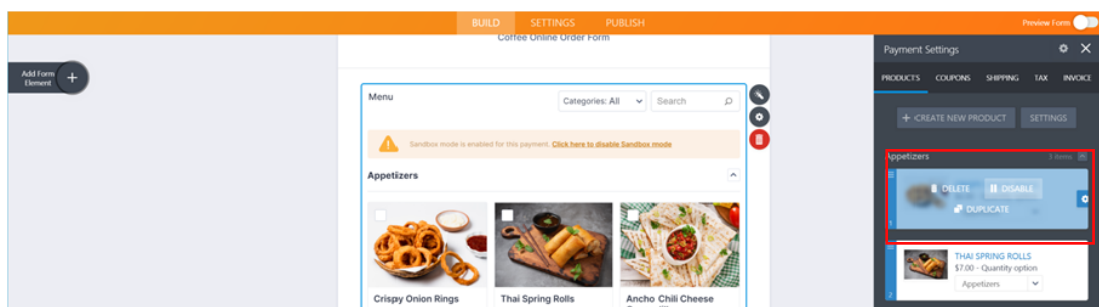
Step 10

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

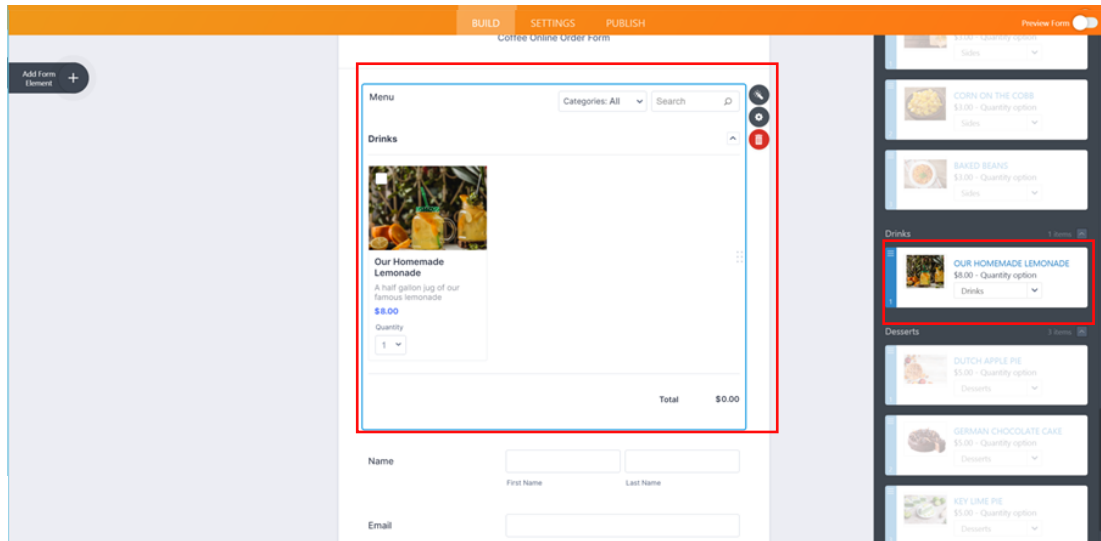


Step 11

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.

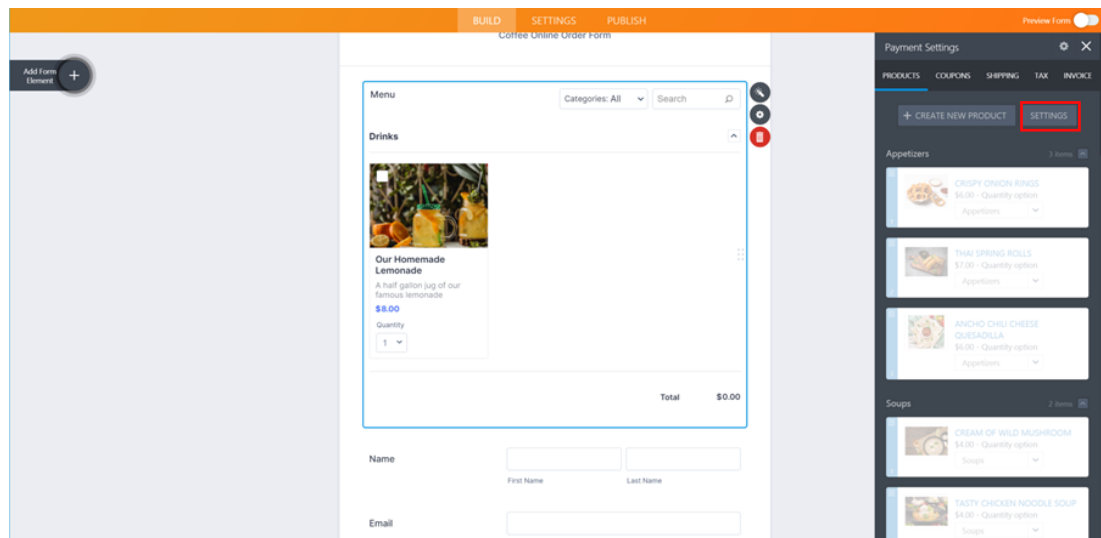


Now I have everything hidden or deleted except one product under the drinks category.



Step 12

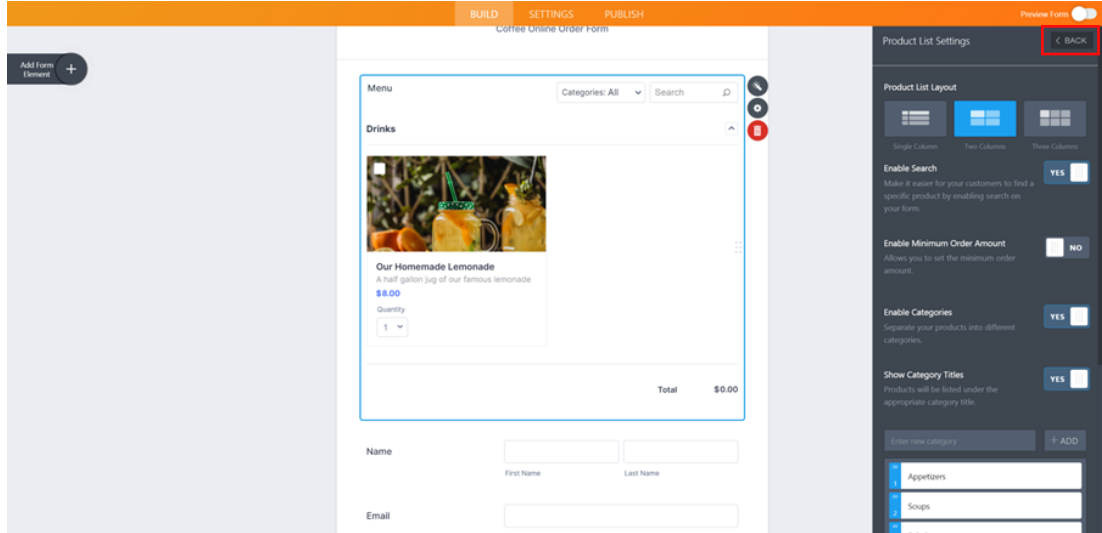
Optional Step: Before we customise our drinks menu item, I'm going to make sure my product is selected and then I'm going to click Settings.



Step 13

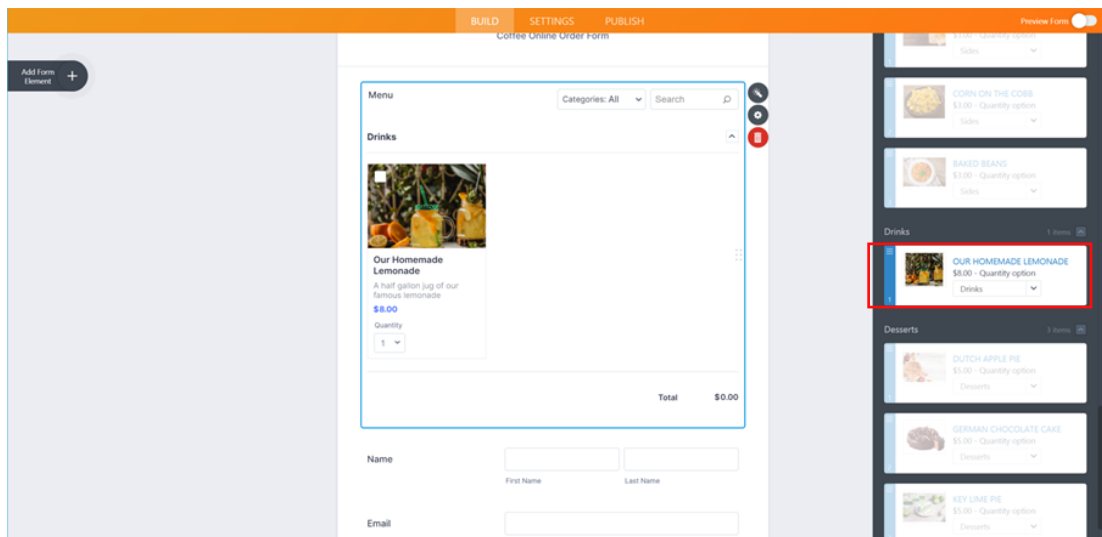
Under here I'm going to change the layout to two columns instead of three. You don't have to do this, it is just to show you the options you have. Take a read through the rest of the options, you might want to enable a minimum order amount and hide your categories. I am just going to leave them how they 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.

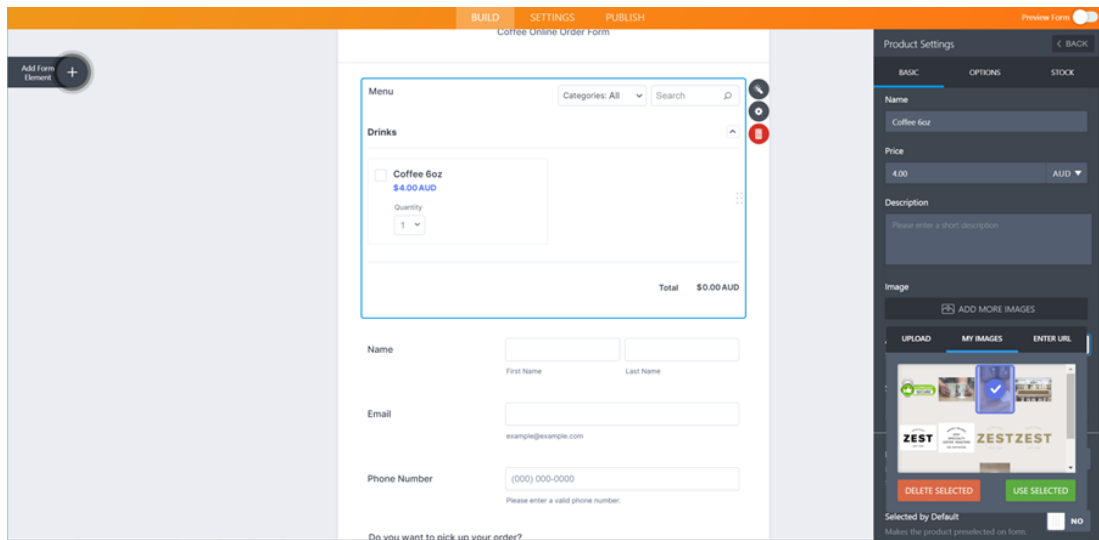


Step 15:

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

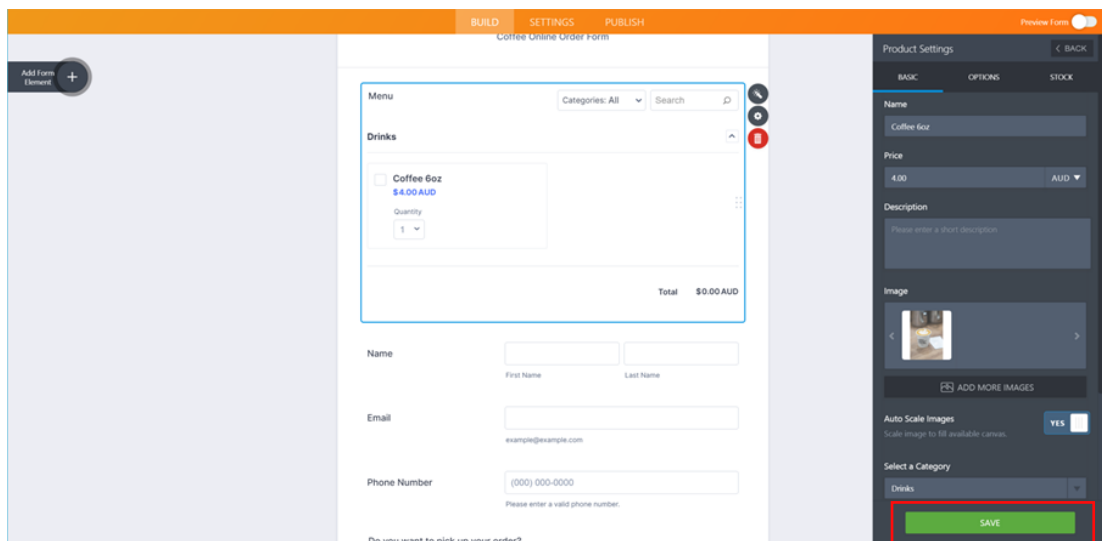
First I have changed the product name to Coffee 6oz and the price to \$4. Make sure you change the USD currency to AUD. For this product, I decided a description wasn't necessary.

You can upload your own images, I have already got some images uploaded so I am just selecting one from the 'My Images' tab.

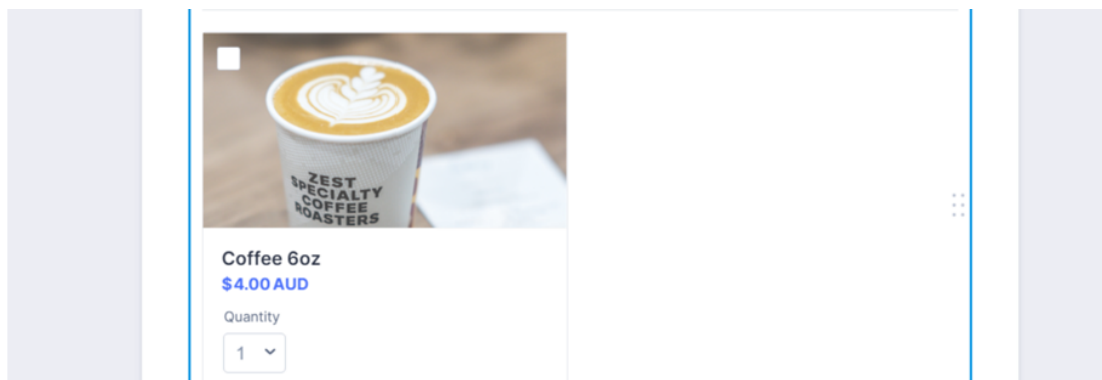


Step 16:

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

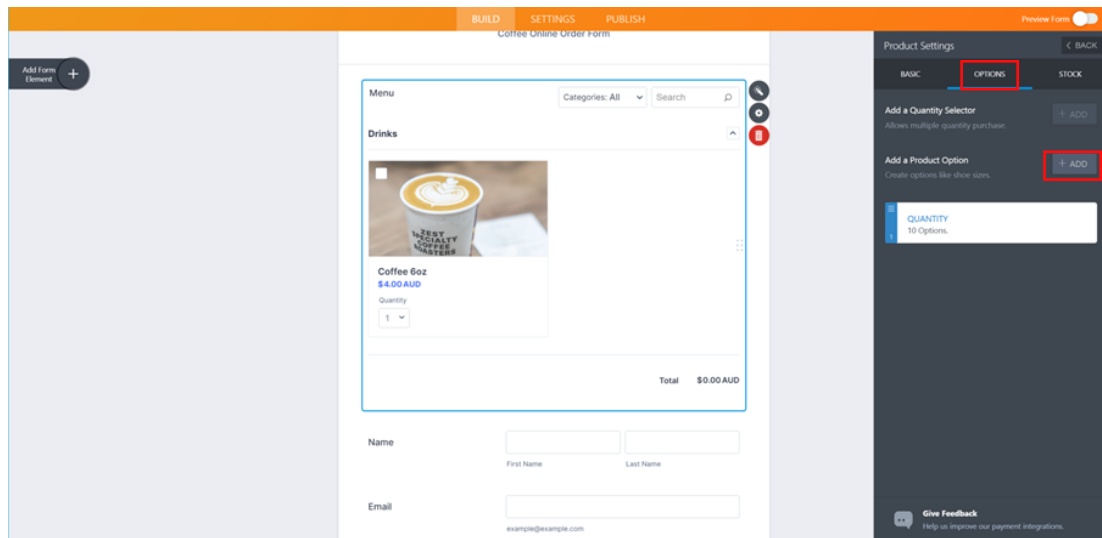


Looking good! Notice how we can select quantity below the coffee, but right now customers can't choose what kind of milk they would like with their coffee, so let's add that to our product.



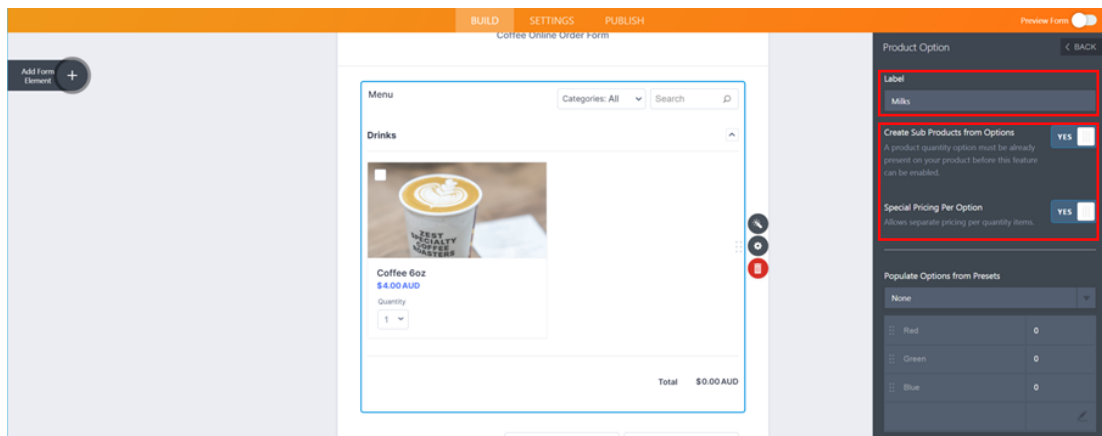
Step 17

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.



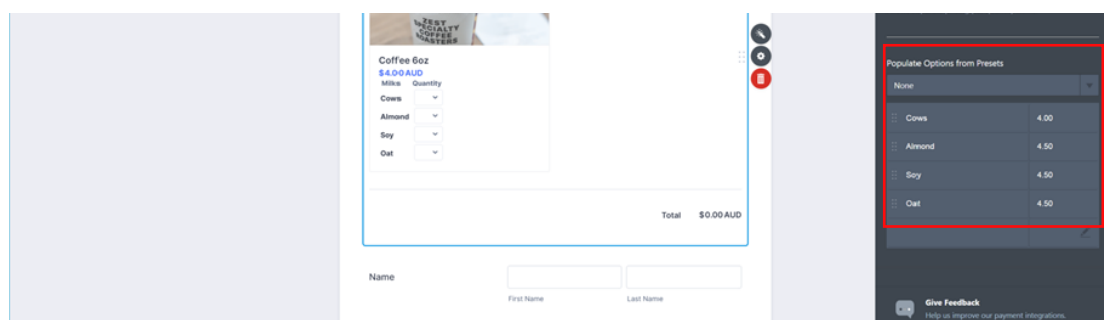
Step 18

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.



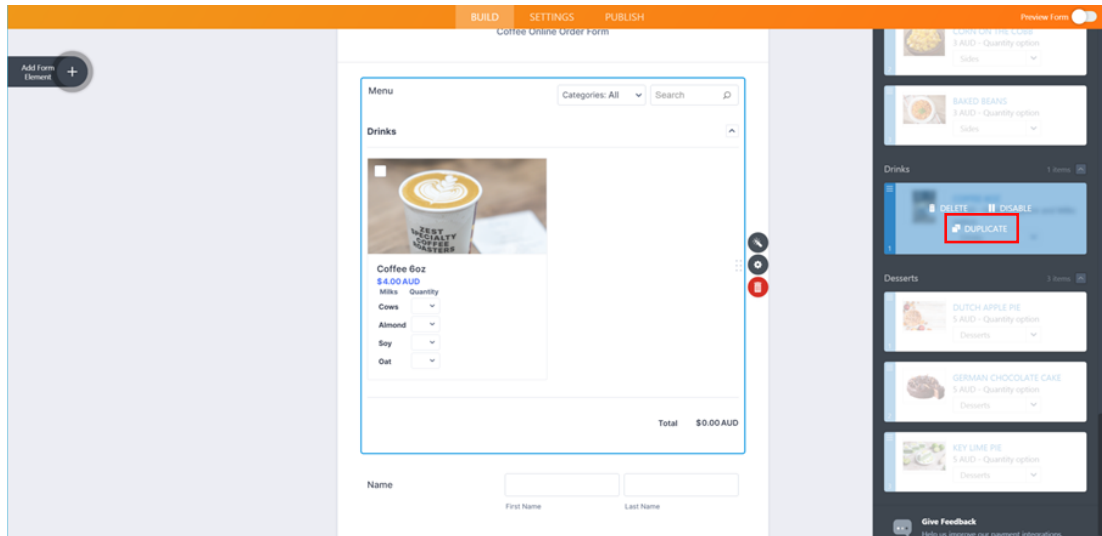
Step 19

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.



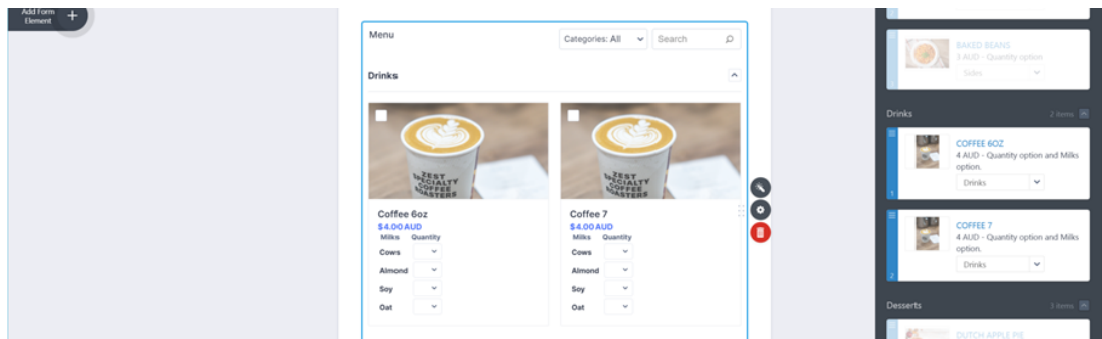
Step 20

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.

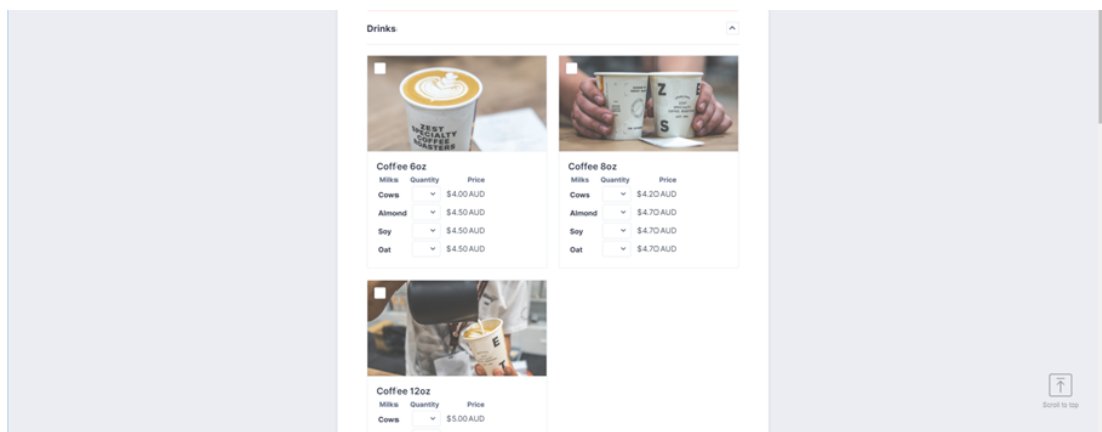


Step 21

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.

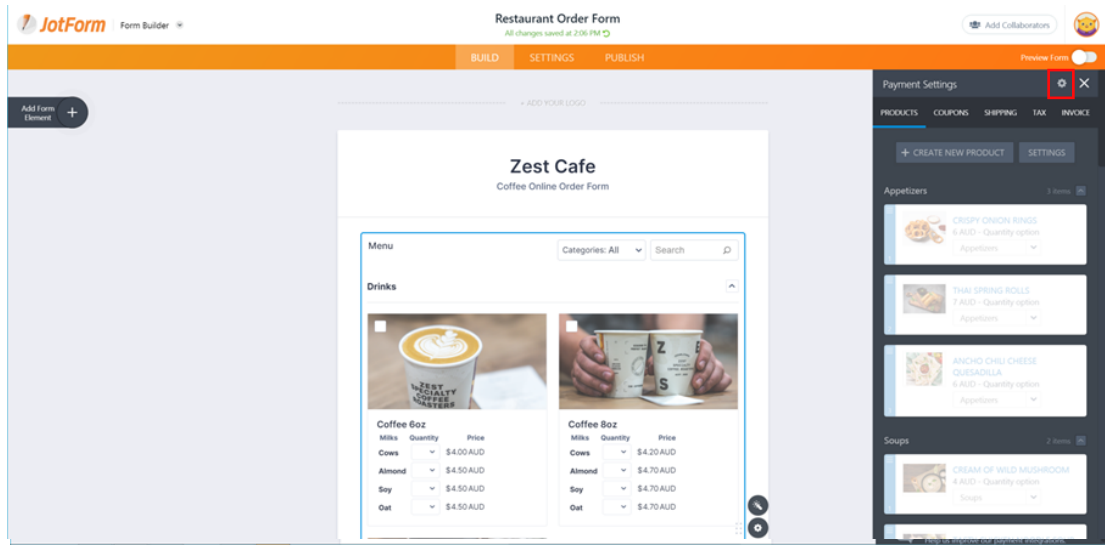


Take a look at the completed menu below, where all the pricing increases with the product size.



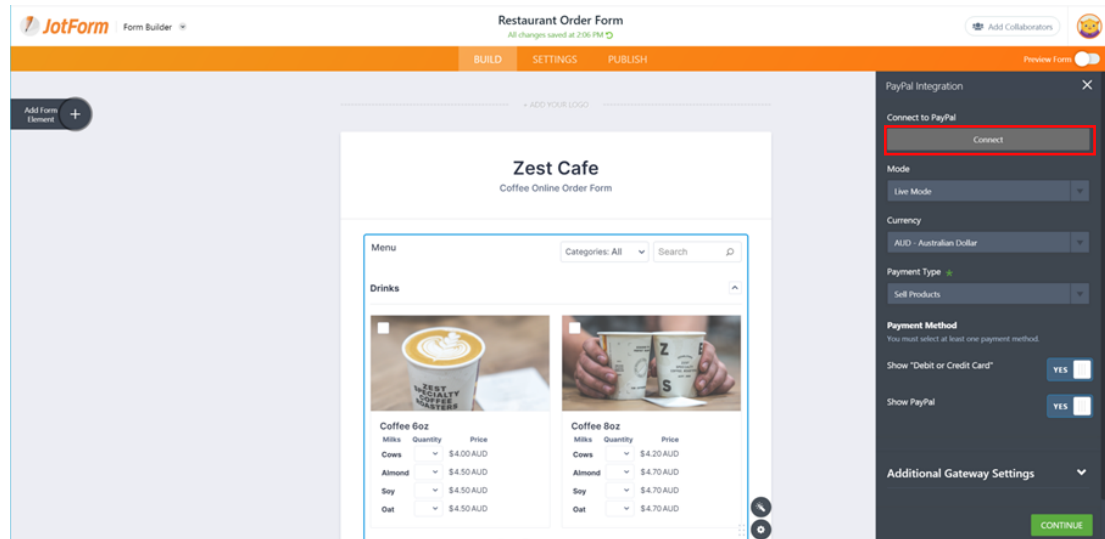
Step 22

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'.



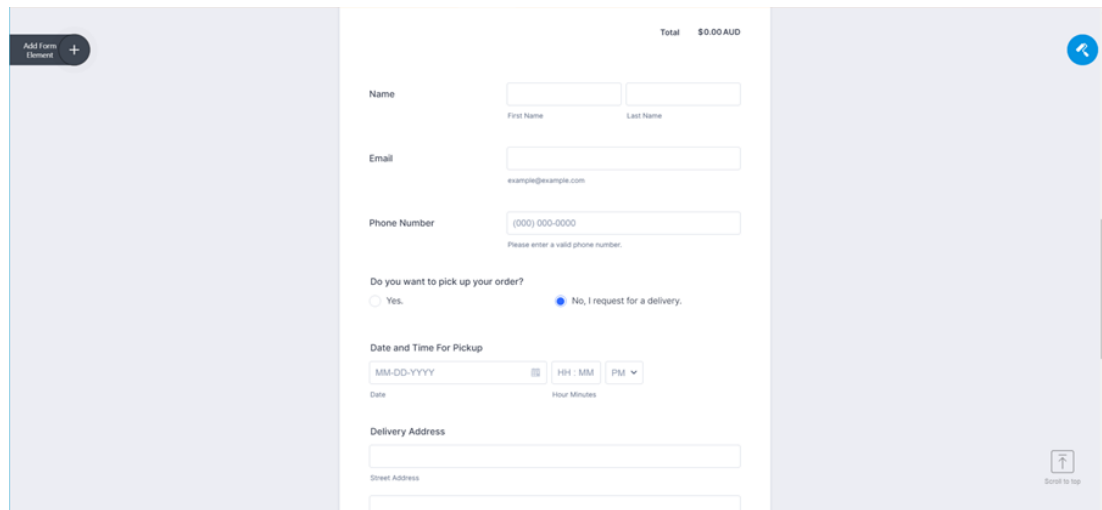
Step 23

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.



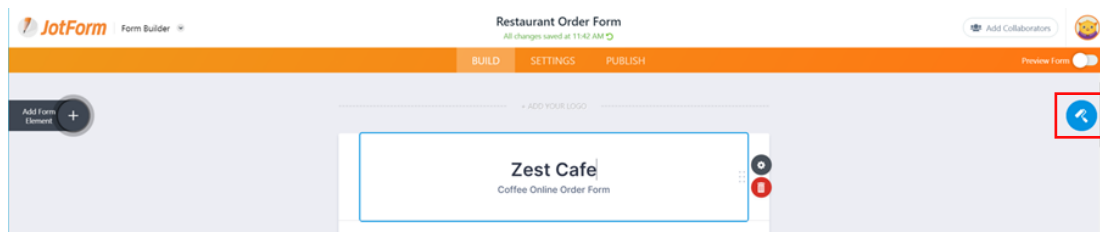
The screenshot shows a form builder interface with a central form titled "Restaurant Order Form". The form includes the following fields and options:

- Name:** Two input fields for "First Name" and "Last Name".
- Email:** One input field with the placeholder "example@example.com".
- Phone Number:** One input field with the placeholder "(000) 000-0000" and a note "Please enter a valid phone number."
- Do you want to pick up your order?:** Two radio buttons: "Yes." (unselected) and "No, I request for a delivery." (selected).
- Date and Time For Pickup:** A date picker (MM-DD-YYYY), a time picker (HH:MM), and a dropdown for "PM".
- Delivery Address:** One input field for "Street Address".

On the right side of the form, there is a blue paint roller icon and a "Send to top" button.

Step 25

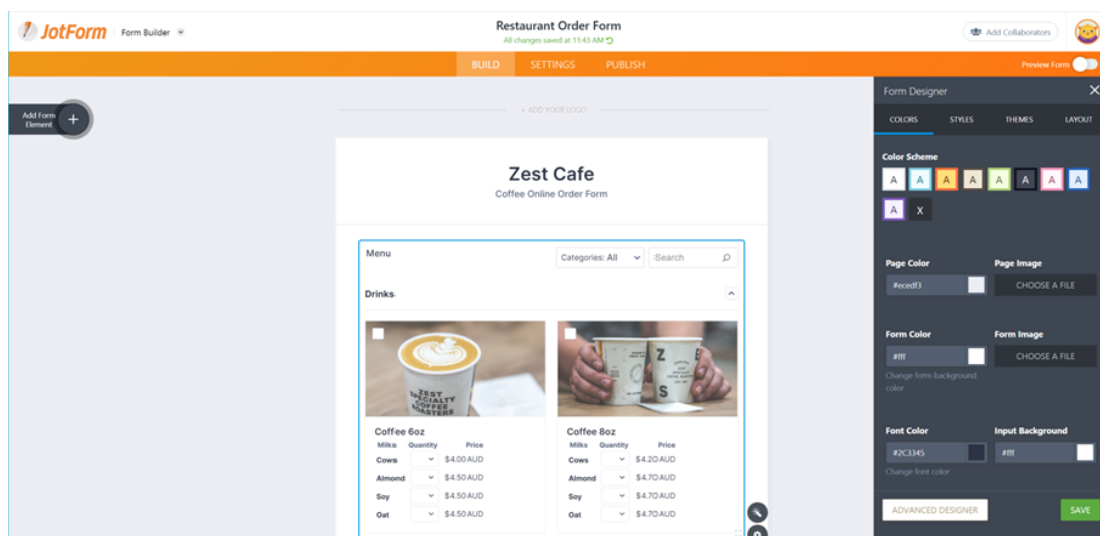
Now let's look at customising the look of your form. Grey not your colour? Not a problem! You can customise the look of your form by clicking the blue paint roller button on the right-hand side.



The screenshot shows the JotForm builder interface for a "Restaurant Order Form" titled "Zest Cafe". The form is displayed in a preview mode. A blue paint roller icon is highlighted with a red box on the right side of the form, indicating the option to customize the form's appearance.

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.



The screenshot shows the JotForm builder interface for a "Restaurant Order Form" titled "Zest Cafe". The form is displayed in a preview mode. The "Form Designer" panel is open on the right side, showing options for customizing the form's appearance:

- Color Scheme:** A row of color swatches for text and background colors.
- Page Color:** A color swatch and a "CHOOSE A FILE" button for the page background image.
- Form Color:** A color swatch and a "CHOOSE A FILE" button for the form background image.
- Font Color:** A color swatch and an "Input Background" color swatch for the form input fields.

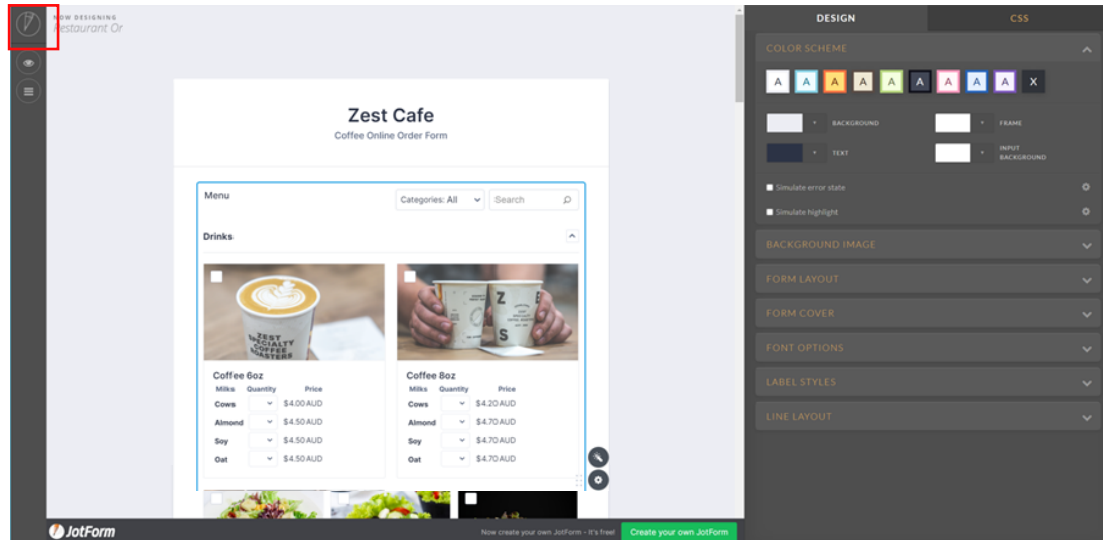
At the bottom of the panel, there is an "ADVANCED DESIGNER" button and a "SAVE" button.

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.

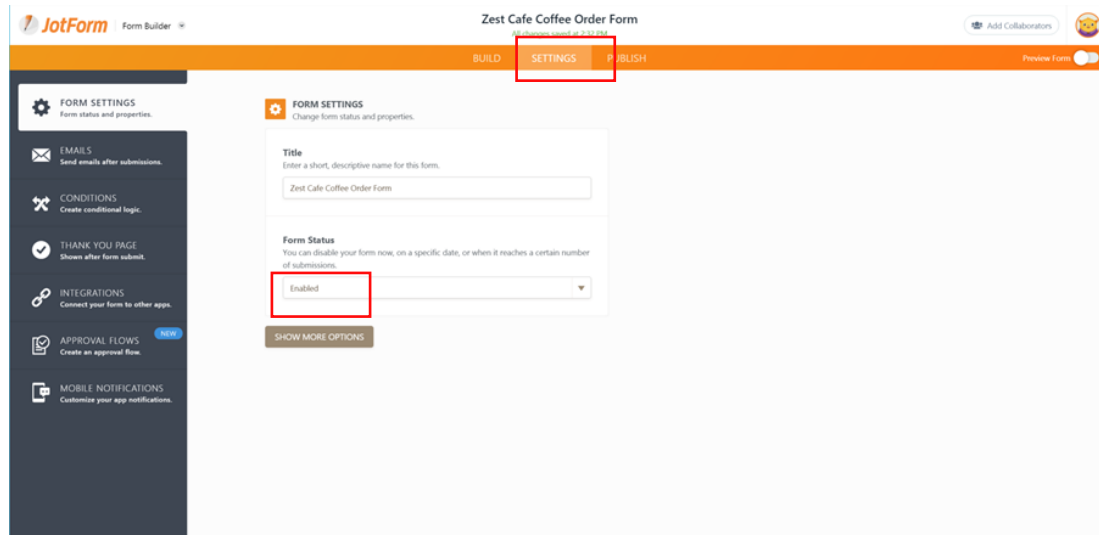
Down the bottom you will see the 'ADVANCE DESIGNER' button where you can edit loads more, including fonts, background images, form layout, form cover, label styles and more.

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.



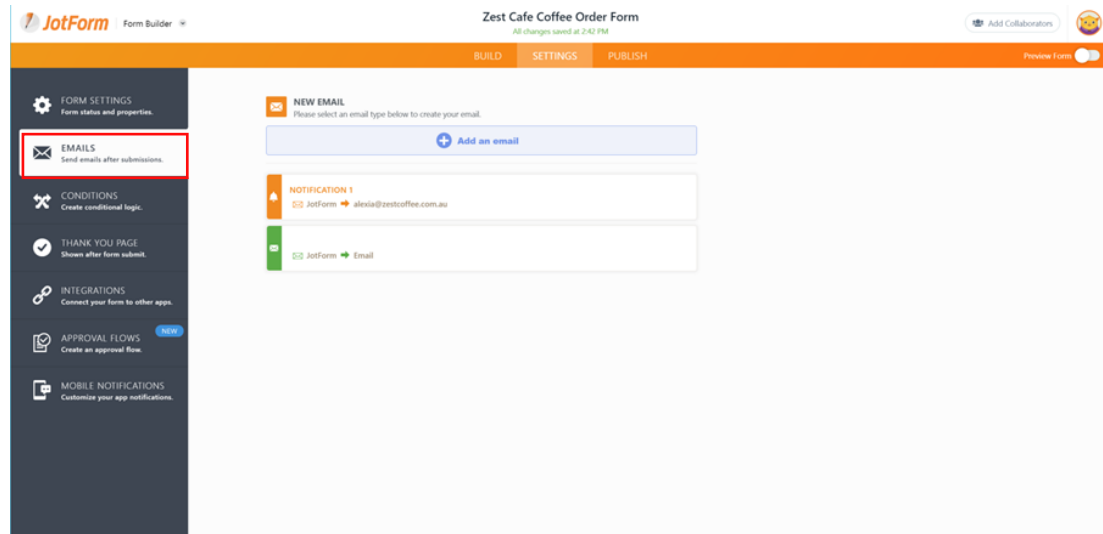
Step 28

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.



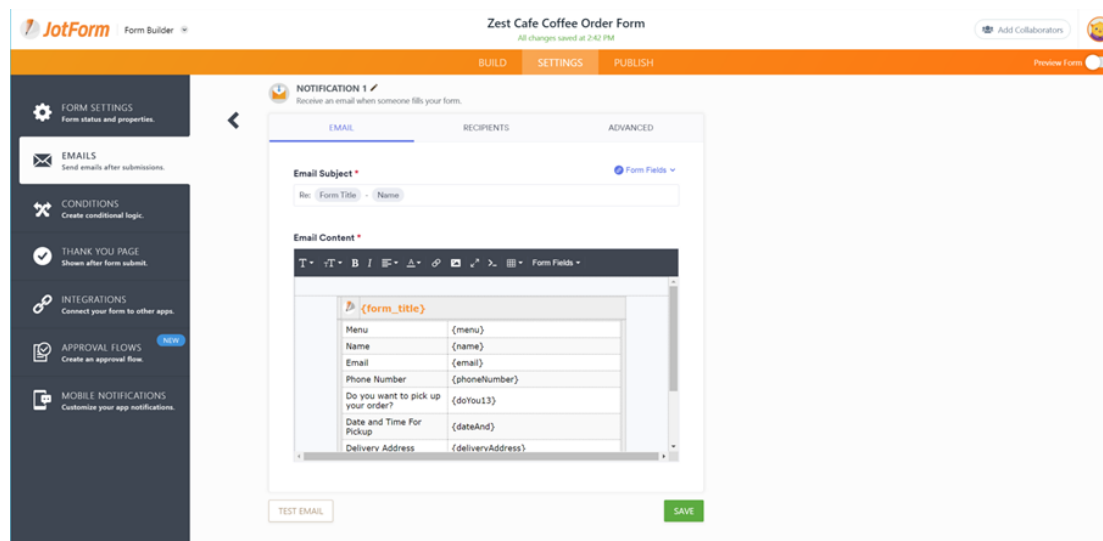
Step 29

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!



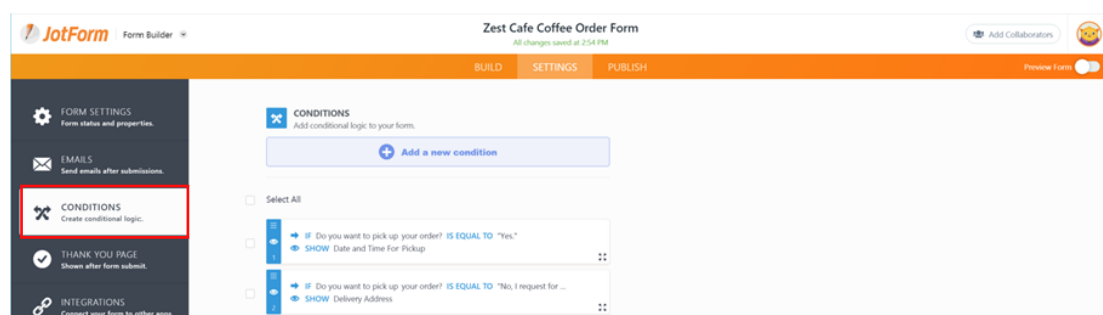
Step 30

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.



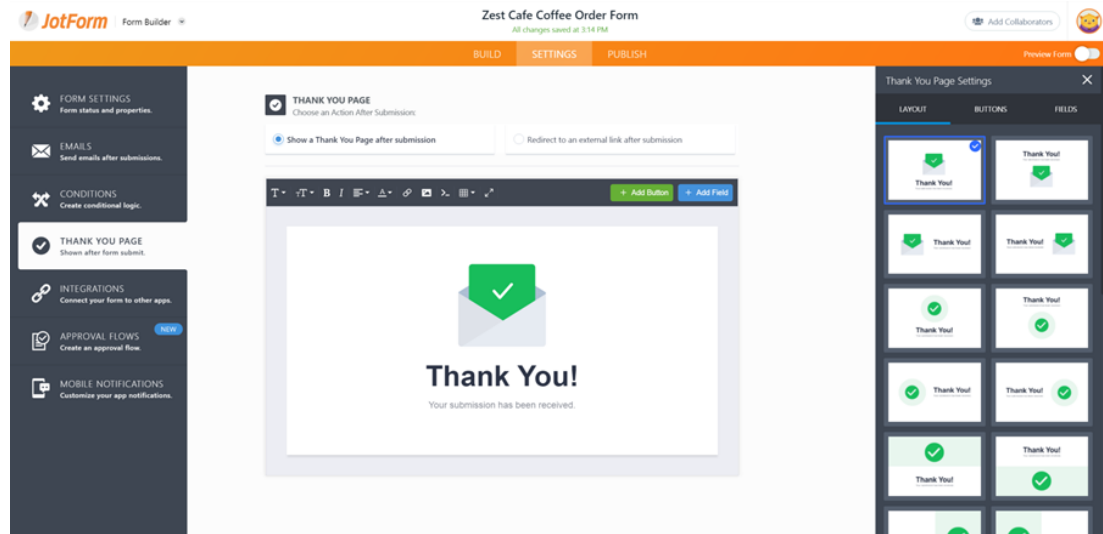
Step 31

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.



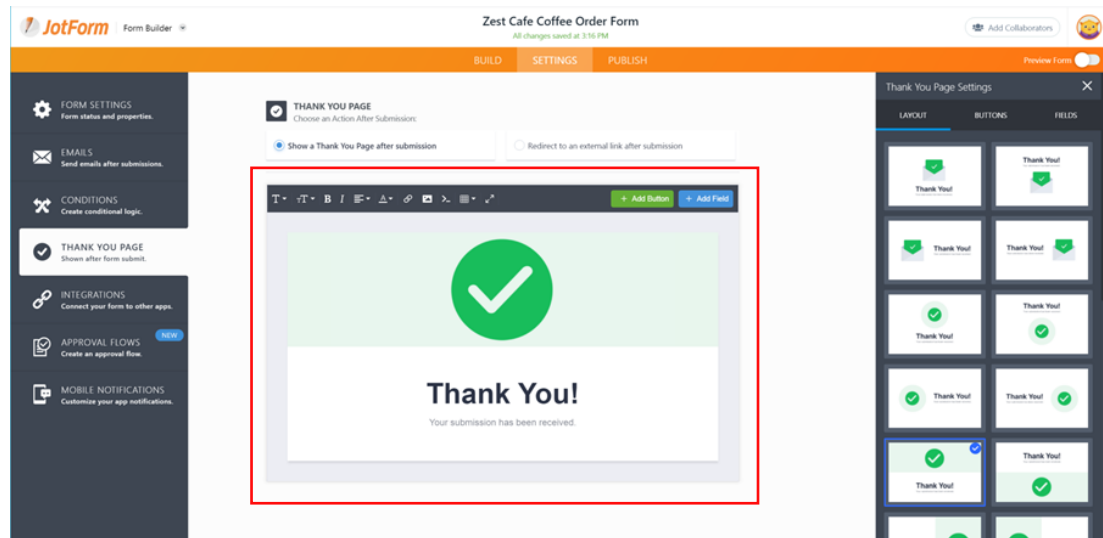
Step 32

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.



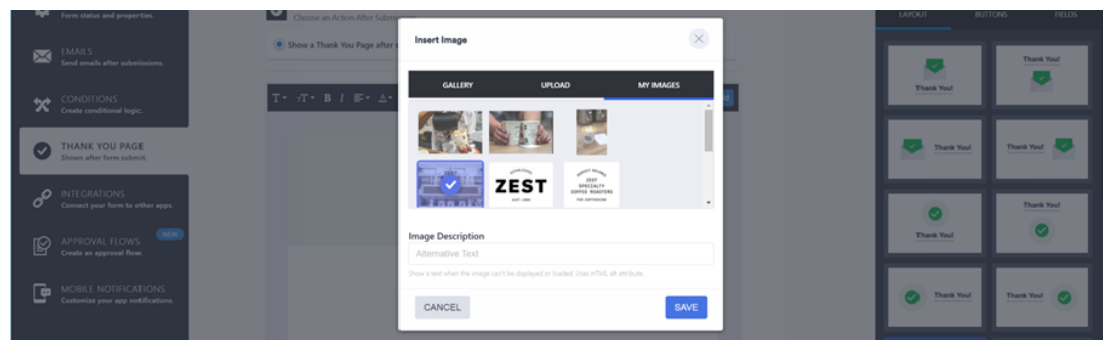
Step 33

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



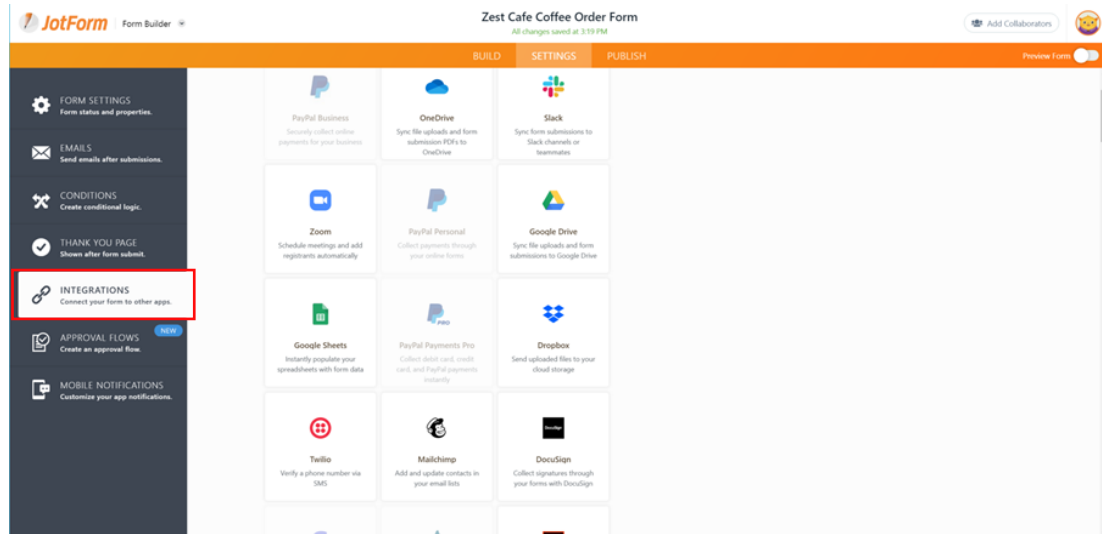
Step 34

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.



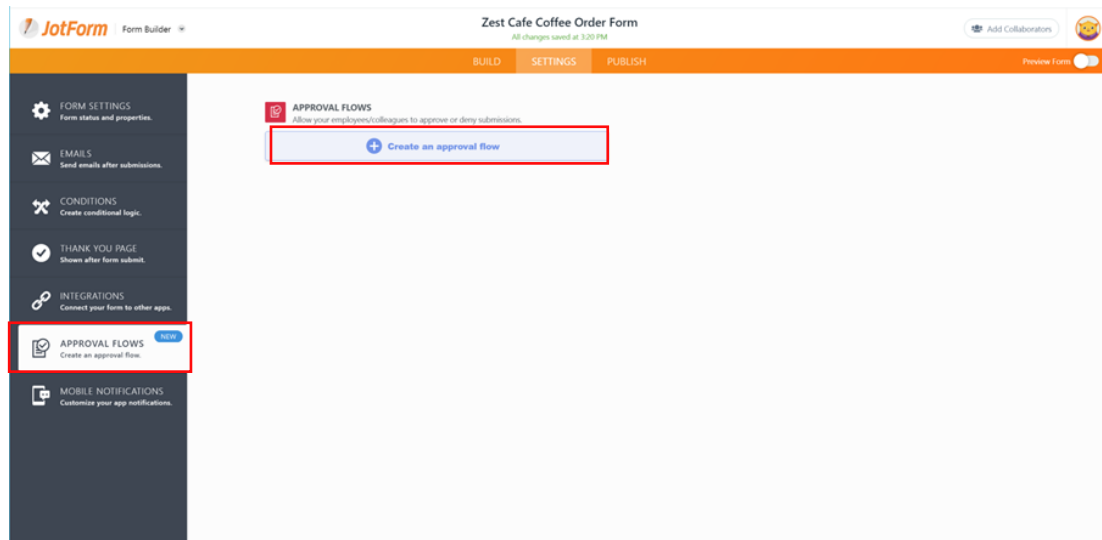
Step 35

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.



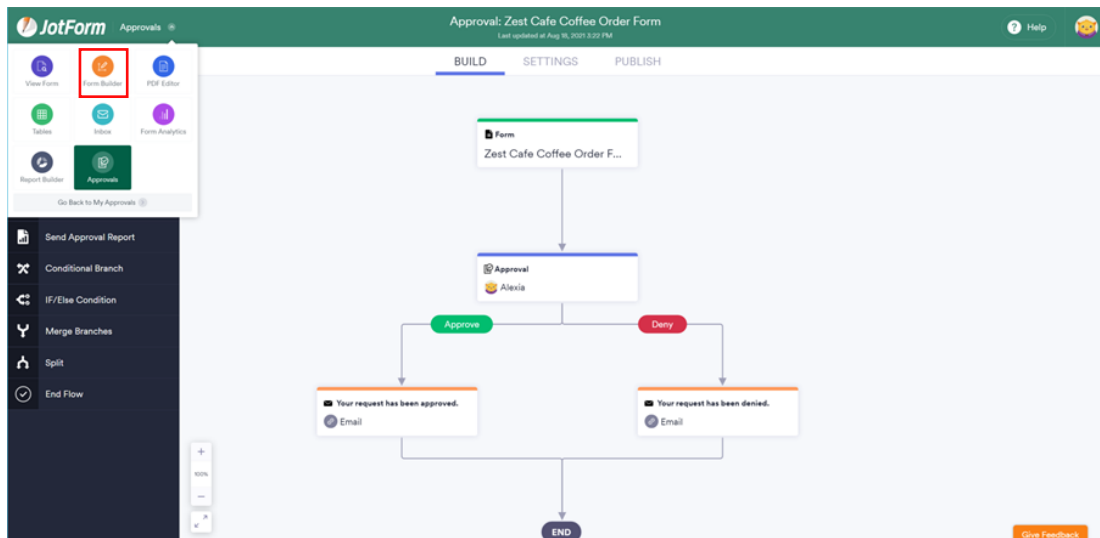
Step 37

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 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 of 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!

The screenshot shows the JotForm 'Publish' interface for a form titled 'Zest Cafe Coffee Order Form'. The top navigation bar includes 'BUILD', 'SETTINGS', and 'PUBLISH' (highlighted in red). The left sidebar contains several options: 'QUICK SHARE', 'EMBED', 'ASSIGN FORM', 'EMAIL', 'PREFILL', 'PDF', and 'PLATFORMS'. The main content area displays the following options:

- DIRECT LINK OF YOUR FORM:** A message stating 'Your form is securely published and ready to use at this address.' Below this is a 'LINK TO SHARE' section with a 'Public Form' tag and a link: <https://form.jotform.com/212288487789881>. There are 'COPY LINK' and 'OPEN IN NEW TAB' buttons.
- INVITE BY EMAIL:** A section with a 'To:' field and the instruction 'Enter email addresses to send invitation with permissions.'
- SHARE FORM:** A section with the instruction 'Share your form link in various social posts and through email.' and a 'SHARE OPTIONS' button.
- CREATE APP:** A section with the instruction 'Create an app to store all of your forms in one place and easily share them with others. Start with this form!' and a 'CREATE APP' button.