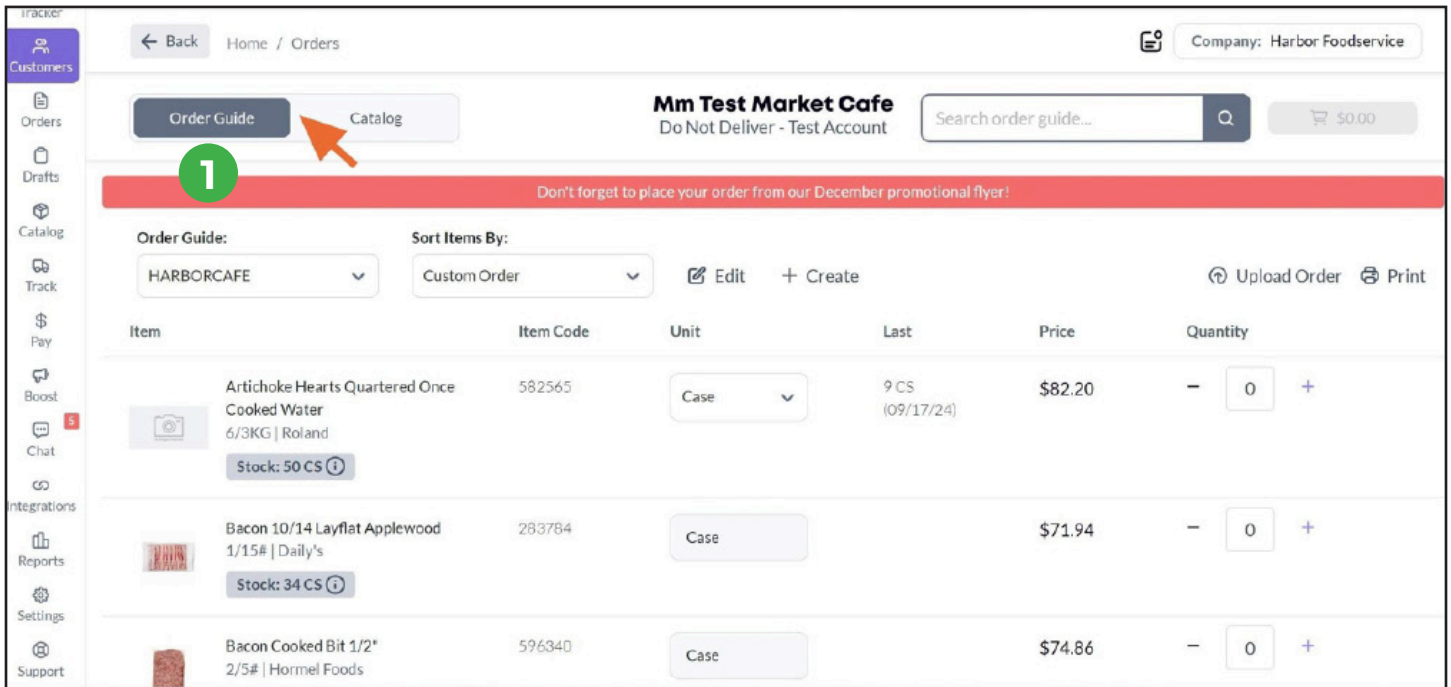


SETTING UP NOTIFICATIONS

This guide provides a straightforward process for setting up text or email notifications for customers, ensuring they receive timely reminders about their orders. By following the outlined steps, Harbor Foodservice can enhance customer communication and improve order management. Implementing these alerts can lead to increased customer satisfaction and potentially higher sales. Overall, this guide is essential for anyone looking to streamline customer interactions and keep them informed.

1 Open the **order guide** you want to use to send reminders to your customers.



Order Guide Catalog

1

Don't forget to place your order from our December promotional flyer!

Order Guide: HARBORCAFE Sort Items By: Custom Order Edit + Create Upload Order Print

Item	Item Code	Unit	Last	Price	Quantity
Artichoke Hearts Quartered Once Cooked Water 6/3KG Roland Stock: 50 CS	582565	Case	9 CS (09/17/24)	\$82.20	0
Bacon 10/14 Layflat Applewood 1/15# Daily's Stock: 34 CS	283784	Case		\$71.94	0
Bacon Cooked Bit 1/2* 2/5# Hormel Foods	596340	Case		\$74.86	0

SETTING UP NOTIFICATIONS

2 Select **"Edit"** button.

The screenshot shows the 'Edit Order Guide' interface. At the top, there is a 'Sort Items By:' dropdown menu set to 'Custom Order'. To the right of this menu is an 'Edit' button, which is highlighted with a red arrow and a green circle containing the number 2. Further right is a '+ Create' button. Below these buttons is a table with columns: Item Code, Unit, Last, and Price. The table contains two rows of data:

	Item Code	Unit	Last	Price
Quartered Once	582565	Case	9 CS (09/17/24)	\$82.20
Applewood	283784	Case		\$71.94

3 Select **"More Options"** from the menu.

The screenshot shows the 'Edit Order Guide' interface with a sidebar on the left containing various navigation icons. The main content area has a header with 'Edit Order Guide' and a 'Close Editor' button. Below the header, there are three dropdown menus: 'Location/Guide:' set to 'HARBORCAFE (Do Not Deliv...', 'Sort Items By:' set to 'Custom Order', and 'Show:' set to 'Only Active Items'. To the right of these menus is a 'More Options' button, which is highlighted with a red arrow and a green circle containing the number 3. Further right is a '+ Add from Catalog' button. Below these buttons is a table with columns: Item Name, Item Code, Unit, Price, Last, and Par. The table contains four rows of data:

Item Name	Item Code	Unit	Price	Last	Par
<input type="checkbox"/> Apron Polycarbonate Embossed 28X46 White PROPAK ORIGINAL 5/100CT	171098	Case Each	\$95.08 \$22.82	1 CS (12/12/24)	3
<input type="checkbox"/> Artichoke Hearts Quartered Once Cooked Water Roland 6/3KG	582565	Case Each	\$82.20 \$16.44	9 CS (09/17/24)	
<input type="checkbox"/> Bacon 10/14 Layflat Applewood Daily's 1/15#	283784	Case	\$71.94		
<input type="checkbox"/> Bacon Cooked Bit 1/2" Hormel Foods 2/5#	596340	Case	\$74.86		

SETTING UP NOTIFICATIONS

4 Navigate to **“Order guide Settings”**.

The screenshot shows the 'Edit Order Guide' interface. At the top, there are filters for 'Location/Guide' (HARBORCAFE), 'Sort Items By' (Custom Order), and 'Show' (Only Active Items). Below these is a table of items with columns for Item Name, Item Code, Unit, and Price. A red arrow points to a menu icon (three dots) next to the first item, which has opened a dropdown menu. The menu options are: 'Order Guide Settings' (highlighted with a green circle and number 4), 'Upload to Order', 'Add Section', 'Print', 'Import Order Guide (XLSX)', 'Export Order Guide (XLSX)', and 'Delete Order Guide'.

Item Name	Item Code	Unit	Price
<input type="checkbox"/> Apron Polycarbonate Embossed 28X46 White PROPAK ORIGINAL 5/100CT	171098	Case Each	\$95.08 \$22.82
<input type="checkbox"/> Artichoke Hearts Quartered Once Cooked Water Roland 6/3KG	582565	Case Each	\$82.20 \$15.44

5 Select **“Add Alert”** to begin setting up notifications.

The screenshot shows the 'Order Guide Settings' form. The form has several fields: 'Order Guide Name' (HARBORCAFE), 'Guide Description', 'Min. Order Amount', 'Min. Order Cases' (25), 'Delivery Days' (Monday through Sunday, all selected), 'Price Visibility' (Don't show item prices in order emails), 'Add Items Restriction' (Allow employees to add items), 'Order Reminder Alert' (Add Alert button, highlighted with a green circle and number 5), and 'Enable Order Approval' (toggle switch).

Order Guide Name: HARBORCAFE

Guide Description:

Min. Order Amount:

Min. Order Cases: 25

Delivery Days: Monday x Tuesday x Wednesday x Thursday x Friday x Saturday x Sunday x

Price Visibility: Don't show item prices in order emails

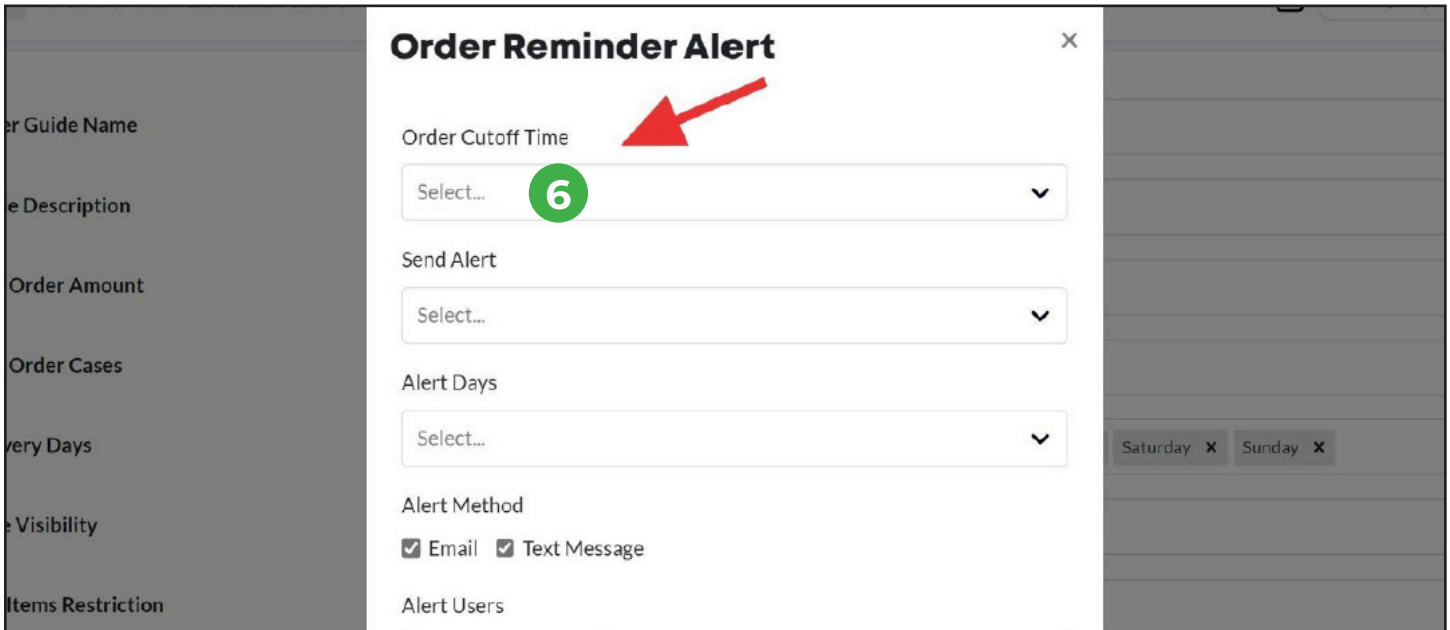
Add Items Restriction: Allow employees to add items

Order Reminder Alert: **Add Alert**



Enable Order Approval: ☐

PLACING AN ORDER USING EXCEL

6 Specify the **“Cutoff Time”** for order placement.



Order Reminder Alert [X]

Order Cutoff Time   Select... ▼

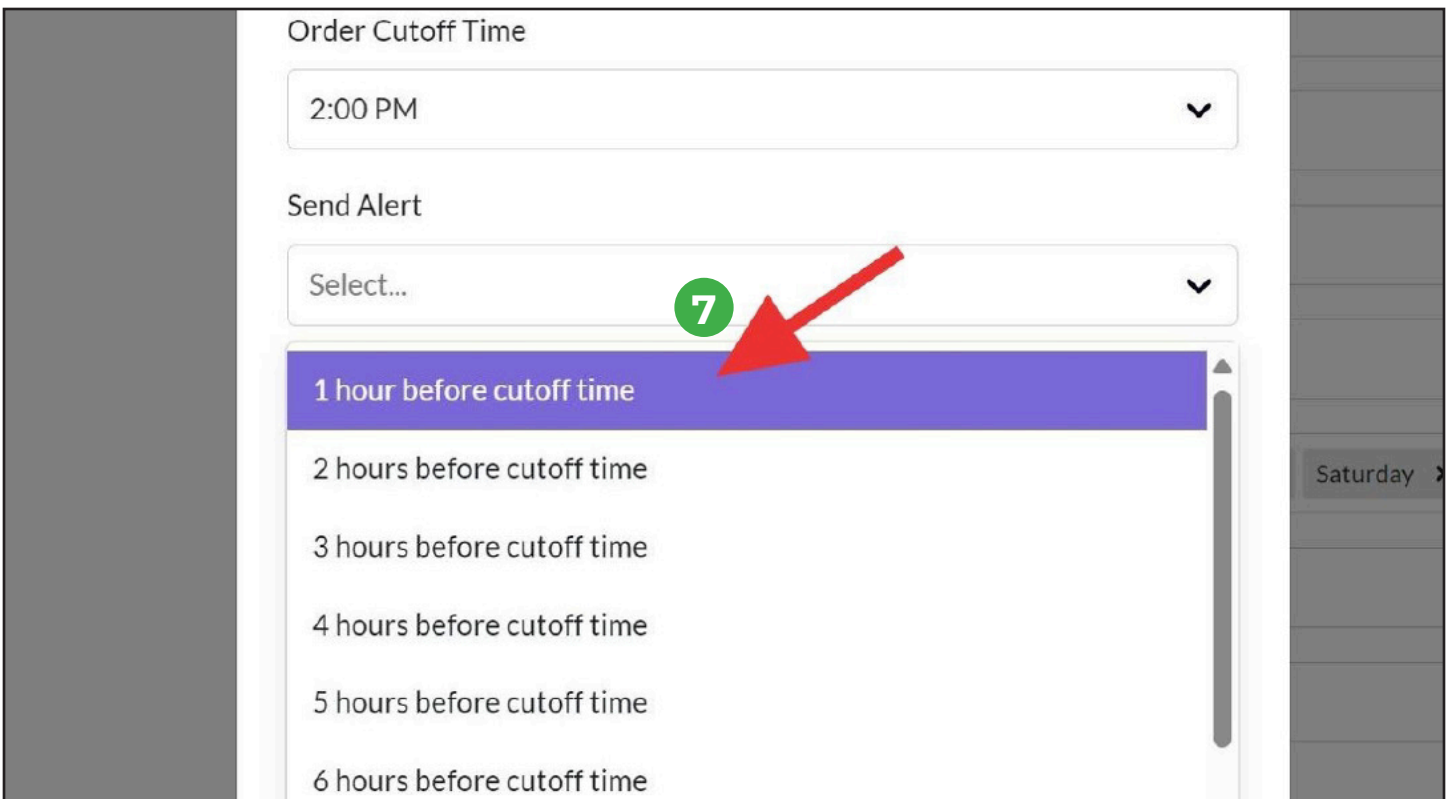
Send Alert Select... ▼

Alert Days Select... ▼

Alert Method
☒ Email ☒ Text Message


Alert Users

7 Choose **how long** before the cutoff time the alert should be sent.



Order Cutoff Time
2:00 PM ▼

Send Alert

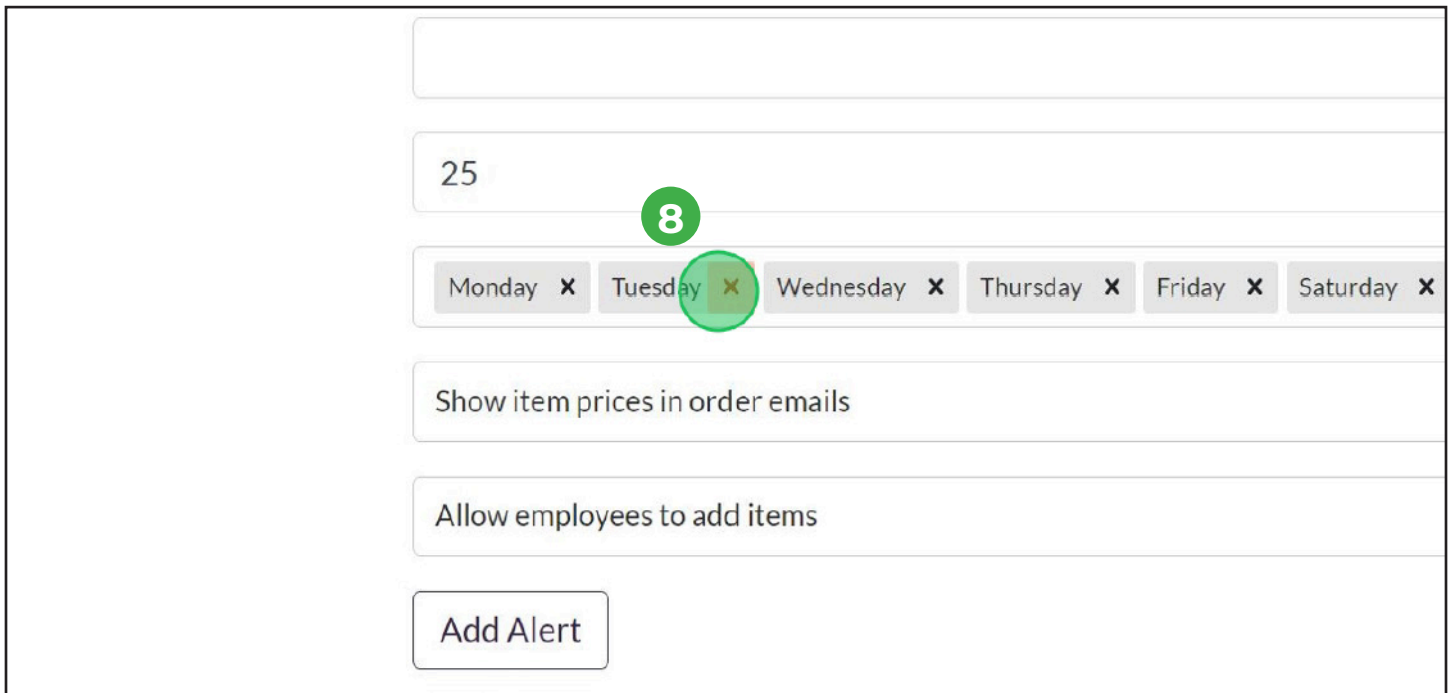
Select... ▼ 

- 1 hour before cutoff time**
- 2 hours before cutoff time
- 3 hours before cutoff time
- 4 hours before cutoff time
- 5 hours before cutoff time
- 6 hours before cutoff time

SETTING UP NOTIFICATIONS

8

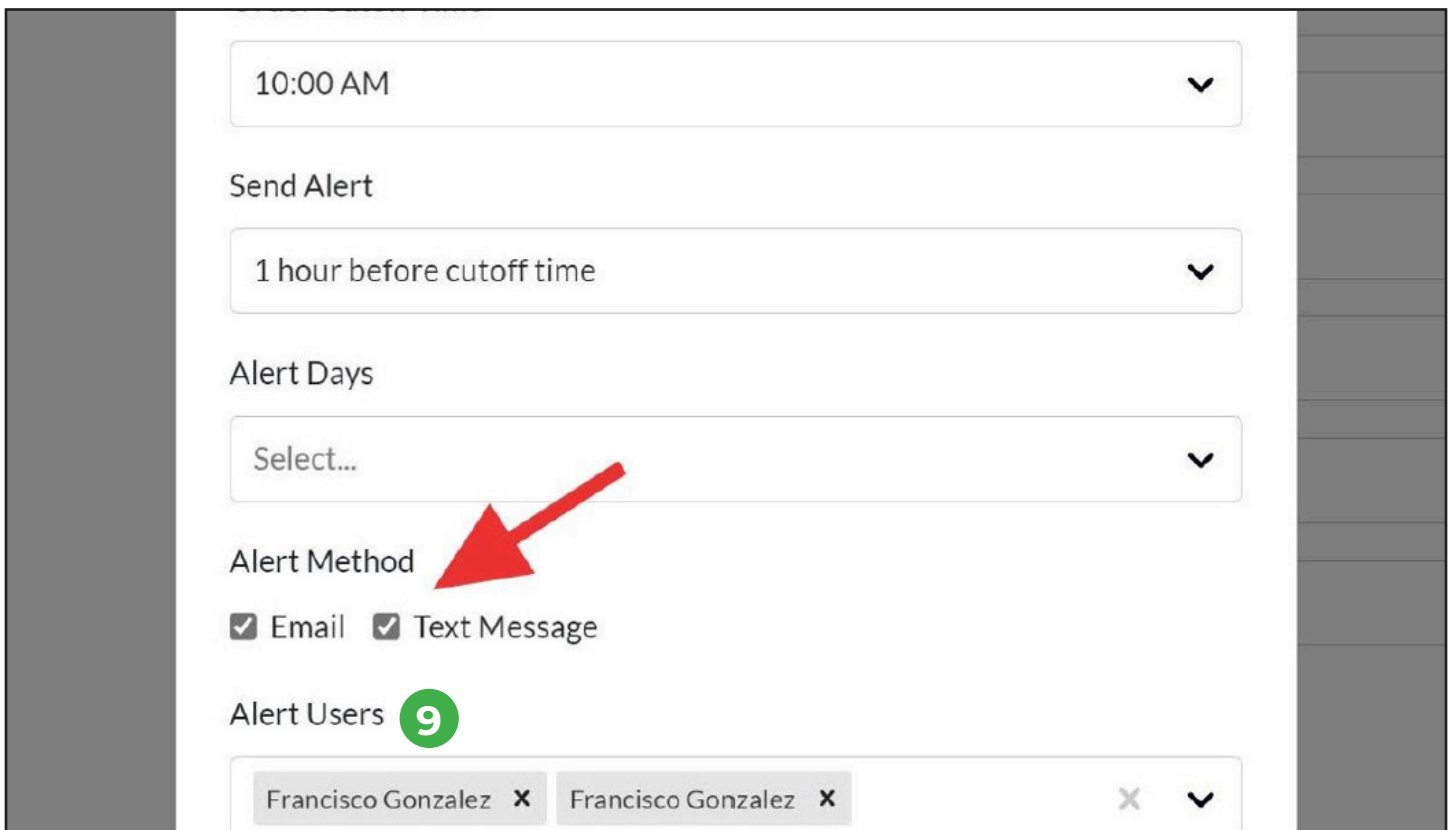
Select the **days** your customer places their orders when the reminder should be sent.



A screenshot of a notification setup form. At the top is a text input field. Below it is a dropdown menu showing the number '25'. Underneath the dropdown is a row of seven buttons representing the days of the week: Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Each button has an 'X' icon to its right. The 'Tuesday' button is highlighted with a green circle, and a green circle with the number '8' is positioned above it. Below the day buttons are two more text input fields: 'Show item prices in order emails' and 'Allow employees to add items'. At the bottom of the form is a button labeled 'Add Alert'.

9

Enter the **user(s)** who should receive the alerts.



A screenshot of the alert configuration section of a form. It includes several dropdown menus: '10:00 AM', 'Send Alert', '1 hour before cutoff time', and 'Alert Days' (which shows 'Select...'). Below these is the 'Alert Method' section, which has two checked checkboxes: 'Email' and 'Text Message'. A red arrow points to the 'Alert Method' label. At the bottom is the 'Alert Users' section, which has a green circle with the number '9' next to it. Below this label is a row of two buttons labeled 'Francisco Gonzalez', each with an 'X' icon to its right. To the right of these buttons are a grey 'X' icon and a dropdown arrow.

SETTING UP NOTIFICATIONS

- 10** Choose how the customer would like to receive the reminder:
Email or Text Message.

10:00 AM

Send Alert

1 hour before cutoff time

Alert Days

Monday x Thursday x

Alert Method

☒ Email ☒ Text Message

Alert Users

Francisco Gonzalez x Francisco Gonzalez x

A red arrow points from a green circle with the number 10 to the 'Text Message' checkbox in the 'Alert Method' section.

- 11** Click **“Save”** to confirm the alert setup.

Order Guide Name

Guide Description

Min. Order Amount

Min. Order Cases

Delivery Days

Price Visibility

Add Items Restriction

Order Reminder Alert

Enable Order Approval

Company: Harbor P

Order Reminder Alert

Order Cutoff Time

10:00 AM

Send Alert

1 hour before cutoff time

Alert Days

Monday x Thursday x

Alert Method

☐ Email ☒ Text Message

Alert Users

Francisco Gonzalez x Francisco Gonzalez x

Save

A red arrow points from a green circle with the number 11 to the 'Save' button at the bottom of the modal.

SETTING UP NOTIFICATIONS

12 If needed, click **"Add Alert"** to create additional reminders.

25

Monday x Thursday x

Show item prices in order emails

Allow employees to add items

Add Alert

12

☐

13 When finished, click **"Close Editor"** to exit.

← Back Home / Harbor Foodservice

Edit Order Guide

Location/Guide: JIT's (Pasco) Sort Items By: Custom Order Show: Only Active Items More Options + Add from Catalog

Item Name (Sort A-Z)	Item Code	Unit	Price	Last	Par
<input type="checkbox"/> Octopus Raw 2-4LB Packer 1/10#A	707909	Case	\$49.50		
<input type="checkbox"/> Potatoes Russet Baker 40CT Packer 1/50#	194603	Case	\$19.34		
<input type="checkbox"/> Branzino Fresh Northern Fish 1/15#A	852987	Case	\$153.90		
<input type="checkbox"/> Shrimp Head On White 8/12 Northern Fish 5/2#	893209	Case	\$97.85		
supplier.zutanddry.com/customers/place_order/240213679/240213682/.../quant...	12	Case	\$45.41		

13 Close Editor