SavorDesk

Quick Start Guide
savordesk.com/guide

Your first week in SavorDesk

Here's the order that works best – start with a few clients and add the rest as you go.

Get set up

1 Set up with the AI assistant

Paste your website, a price sheet or a few lines about your services. It drafts your packages, prices and tagline – check them and save.

Dashboard → Set up with AI

2 Bring in your clients

Paste a spreadsheet, notes or even a text thread. Each household gets a profile with servings, allergies, dislikes and a never-use list.

Clients → Import

3 Invite your clients

Send each client the intake form to fill in their own details, and the portal invite so they can approve menus and rate meals. No passwords.

Open a client → Send intake / Invite

4 Connect Stripe

Clients pay by card, Apple Pay or Google Pay, and money goes straight to your bank. Venmo, Zelle and Cash App work too.

Settings → Card payments

Every week

1. Write menus	Pick a client and week, then type or paste dishes – or let the AI assistant draft one. Anything that clashes with an allergy is flagged before you send.
2. Get approval	Clients approve or ask for swaps from their phone. You get an email either way.
3. Shop	Every approved menu rolls into one grocery list, merged, sorted by aisle and priced by package size.
4. Cook & label	Print recap sheets with every dish and allergy flag, plus container labels with dates, reheating and allergens.
5. Get paid	Invoices fill in the week's groceries – add your fee and send. Attach receipts, turn on auto-pay, and overdue invoices get a polite weekly reminder.

Good to know

- ✓ Tag an ingredient to force its aisle: "2 lemons @produce"
- ✓ Save your best dishes to Recipes and reuse them in any menu
- ✓ Hide sections you don't use: Settings → Customize workspace
- ✓ Clients only see dish names and reheating – never your notes
- ✓ Share your inquiry page link in your Instagram bio
- ✓ Rather not set it up yourself? Ask for done-for-you setup

Questions? A real person answers.
support@savordesk.com · Tap "? Help & feedback" in the app

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