

CakeBoss Cloud



Getting Started!

Important Note:

Recommended browsers for CakeBoss Cloud are:



We do NOT recommend Internet Explorer (or Edge), which can cause display issues such as buttons not appearing to function, and items not being displayed in drop-down menus.



Quick-Start Steps

1. Enter your information into the “My Bakery” screen. (page 4)
2. Import a pre-loaded recipe for a quick start. (page 5)
3. Add a new customer (page 5 and 6)
4. Start an order/quote (page 7)
5. Use the Pricing Calculator to calculate your costs and find a suggested price. (page 8)
6. Schedule a payment and email an invoice to your customer. (page 9)

1. The “My Bakery” screen is your first stop!

Companion Video (5:25) <https://www.youtube.com/watch?v=7bPxqXr3W7c>

Bakery Details Tab: Enter your business name, address, and contact information, and set your sales tax preferences. The Hourly Rate is the amount used for calculating your hourly rate to determine a price with the Pricing Calculator.

Order Message Tab: Type a short message (400 characters or less) that will print at the bottom of all quotes and invoices.

Terms: If you have a cake contract or lengthy Terms, use the Terms tab for these. Check the ‘Add Terms’ box and these Terms will always be page 2 of your invoice.

Employees: Manage your bakery’s employees or purchase additional employee logins here.

Password: Change your password here.

Logo: Upload your invoice logo here. Logos must be no larger than 250x250 pixels. Supported file types are BMP, GIF, JPEG, PNG, and TIFF.

Friends: Want to tell your friends about CakeBoss Cloud? Or were you referred by a friend? Paste your referral code here, or invite your friends to check it out. If they purchase and keep it for 30 days, you’ll receive a free year’s hosting, and they’ll receive a free employee login.

Colors: Customize your program colors. “Appointments”, “Customer Special Dates” and “Orders” are Calendar settings. “Invoice Color Accent” is for the divider bars on the Invoice. Change this color to match your logo!

ALWAYS SAVE – your changes won’t be applied if you exit this screen without saving!

The screenshot shows the 'My Bakery' screen with the following details:

- Navigation Bar:** Home, Orders, Customers, Recipes, Expenses, Reports, Calendar, My Bakery (circled in red).
- Sub-tabs:** Bakery Details (selected), Order Message, Terms, Employees, Password, Logo, Friends, Colors.
- Form Fields:**
 - Name: Good Things Bakery
 - Address 1: 123 Oak St.
 - Address 2: Ste. 4
 - City: Austin
 - State: TX
 - Zip: 78777
 - Phone: 512-111-1111
 - Web Site: http://www.cakeboss.com
 - Email Address: info@cakeboss.com
 - Tax Rate: 0.00 %
 - Tax Line Items:
 - Tax Delivery:
 - Tax Rental:
 - Hourly Rate: \$20.00
 - Time Zone: (UTC-06:00) Central Time (US & Canada)
 - Data Plan Expires: 4/15/2015
- Buttons:** Save (circled in red), Video, Paypal Invoice.

2. CakeBoss Cloud comes with pre-loaded basic recipes to help you get started. Import the recipes and then modify to suit your business!

Companion Video (10:13) <https://www.youtube.com/watch?v=Rk0-QZk-hpA>

Recipes

Create New Search Master Ingredients Materials **Import Recipes** Video

Import recipes shared by other users

Name	Servings	Price	Cost per Serving	Recipe Category	
American-Style Buttercream		\$6.50	Unknown	Frosting	X Delete
Blueberry Pie		\$5.25	Unknown	Pie	X Delete
Brownies	12	\$8.95	\$0.75	Cookie	X Delete
Buttermilk Pie		\$2.38	Unknown	Pie	X Delete
Cake Mix Cake - Undoctored	15	\$2.50	\$0.17	Cake	X Delete
Cherry Pie		\$0.00	Unknown	Pie	X Delete
Chocolate Buttercream		\$5.29	Unknown	Frosting	X Delete
Chocolate Cake (Scratch)	22	\$4.05	\$0.18	Cake	X Delete
Chocolate Chip Cookies	36	\$9.67	\$0.27	Cookie	X Delete

10 items per page 1 - 10 of 26 items

3. Add a customer. Click 'Customers' then 'Create New'

Customers

Create New Search Video Report Export

Name	Address 1	Email	Phone	
Sally Smith				X Delete

20 items per page 1 - 1 of 1 items

Enter as much information as you wish to enter. The only required fields are the first name and last name. An email address is highly recommended so you can email the invoice to your customer. Be sure to click Save when you are done.

The screenshot shows a web-based form titled "Customer Create". At the top, there is a navigation bar with icons and labels for Home, Orders, Customers, Recipes, Expenses, Reports, Calendar, and My Bakery. The form itself is light blue and contains the following fields:

Company Name	Sabre Paper Company	Phone	512-111-1234
First Name	Sally	Mobile	512-222-2345
Last Name	Smith	Email	sallysmith@sabrepaper.com
Address 1	123 Oak St		
Address 2	Ste. 2		
City	Austin		
State	TX		
Zip Code	78750		
Note	Allergic to kumquats.		

At the bottom left of the form, there are three buttons: "Save", "Save & Close", and "Cancel".

4. Start an Order/Quote.

Companion Video (7:31) <https://www.youtube.com/watch?v=Z8t4vMrV14U>

After you press Save on the customer, a field will appear below for Orders. Below this box is a place to add all your customer's special dates such as their birthday, spouse's and children's birthdays, and anniversary.

To start a new order for this customer, click Add Order below the customer information, or hover over the top Orders menu and select 'Add New' from the dropdown menu.

The screenshot displays a software interface for a bakery. At the top, there is a navigation bar with icons and labels for Home, Orders, Customers, Recipes, Expenses, Reports, Calendar, and My Bakery. The 'Orders' menu is open, showing options: Add Order, Orders and Quotes, Open Orders, Quotes, Last 90 Days, Order Category, and Venues. The 'Add Order' option is circled in red. Below the navigation bar is a 'Customer' information form. The form includes fields for Company, First Name, Last Name, Address 1, Address 2, City, State, and Zip Code. To the right of these fields are fields for Phone, Mobile, Email, and a Note field. The Note field contains the text 'Allergic to kumquats.' Below the customer information form is a table with columns for Order Number, Delivery Date, Category, and Grand Total. The table is currently empty, showing '0' items and 'No items to display'. Below the table is a 'Customer Dates' section with an 'Add Date' button and a table with columns for Special Date, Date Type, and Note. This table is also empty, showing '0' items and 'No items to display'. In the bottom right corner of the screenshot, there is a red text box with the following instructions:

Two ways to start an order:
1. Under the Orders menu, select 'Add Order'.
2. On the Customer Information screen, click 'Add Order' (button only visible after customer is saved).

Home Orders Customers Recipes Expenses Reports Calendar My Bakery

Order Information : # 2 : Sally Smith

Order Information Payments Photos Notes Delivery Internal

Customer	Sally Smith	Total	\$0.00
Order Number	2	Delivery Charge	\$0.00 Tax ?
Order Date	3/24/2015 4:36 PM	Equipment Rental	\$0.00 Tax ?
Delivery Date	3/24/2015 4:36 PM	Tax	\$0.00 Tax Line Items ?
Status	New	Discount	\$0.00
Payment Status	No Payments Scheduled	Discount Reason	
Category	Unknown New	Grand Total	\$0.00
Referred By		Amount Paid	\$0.00
Tax Rate	0.00 % ?	Balance	\$0.00

Save Save & Close Invoice PayPal Copy Work Sheet Shopping List Video Pull Inventory

Add Line Add Package

Description	Number of Servings	Cost Per Serving	Price Per Serving	Calculated Price
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5. Click 'Add Line' to add a line item to your order and use the Pricing Calculator. (Line items with fixed prices can be added as Packages later, after you have created packages.)

Companion Video (2:54) <https://www.youtube.com/watch?v=TH826VGvZ54>

Item Contents

Order Information Recipes Materials

Description: 8" Chocolate Cake with Chocoli

Number of Servings: 1

Estimated Hours: 1.5 ? * \$20.00

Actual Hours: 0 ?

Overhead Amount: \$5.00

Recipe Costs: \$9.34

Material Costs: \$5.74

Out of Pocket: \$20.08 ?

Calculated Price: \$50.08 ?

Cost Per Serving: \$20.08

Price Per Serving: \$50.08 ?

Save Calculate Costs

1. Enter Order Details (skip Actual Hours - this is for when the order is complete).

4. Click Calculate Costs.

5. Adjust price per serving, if necessary. In this case, round to 50.00.

6. Press Save to return to order.

Item Contents

Order Information Recipes Materials

Chocolate Buttercream

Quantity	Name	Cost Per	
1	Chocolate Cake (Scratch)	\$4.05	X Delete
1	Chocolate Buttercream	\$5.29	X Delete

Save Calculate Costs

2. Go to the recipes tab and add your recipes. (optional but recommended)

Item Contents

Order Information Recipes Materials

10" Silver Cake Drum

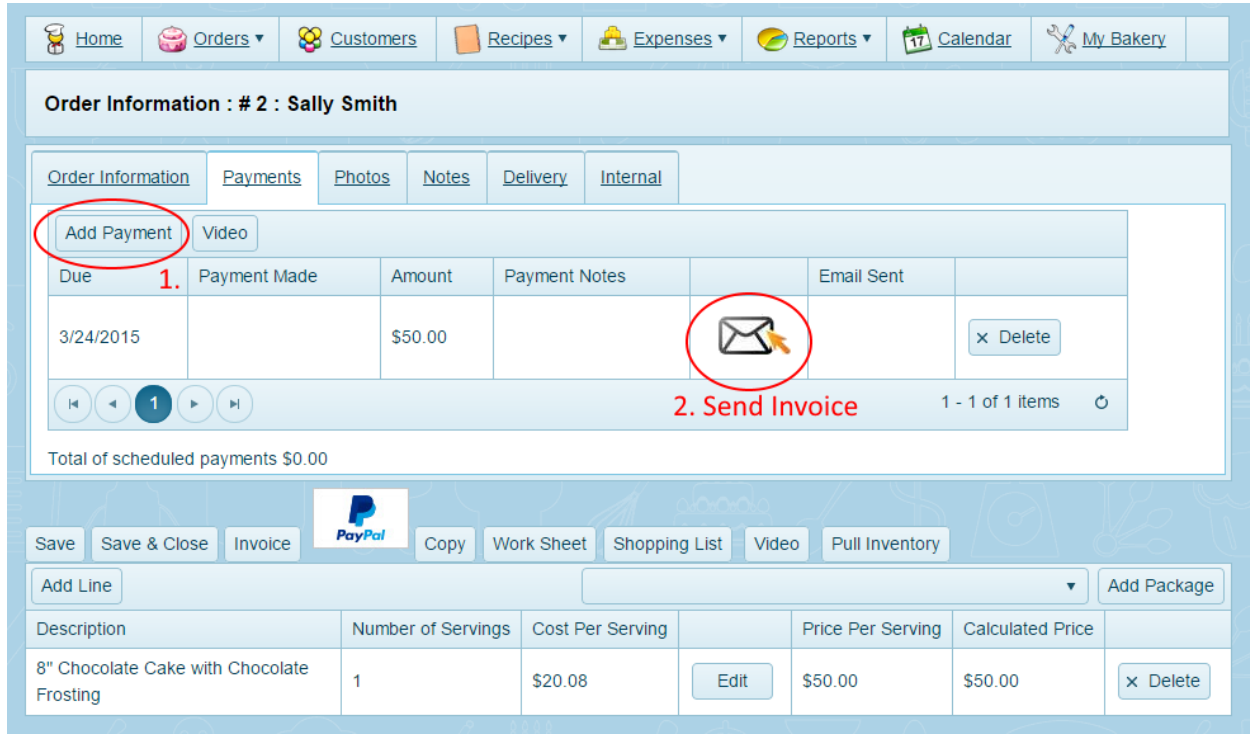
Quantity	Material Name	Cost Per	Price Per	
1	10" Box	\$1.25	\$1.25	X Delete
1	10" Silver Cake Drum	\$4.49	\$4.49	X Delete

Save Calculate Costs

3. Go to the materials tab and add your materials. (optional but recommended)

6. (1) Schedule a payment and (2) email the invoice to your customer! The “Amount Due” on the invoice is always the amount of the next, scheduled, unpaid payment.

Companion Video (7:39) <https://www.youtube.com/watch?v=ZZIz2OXsvsA>



Order Information : # 2 : Sally Smith

Order Information Payments Photos Notes Delivery Internal

Add Payment Video

Due	Payment Made	Amount	Payment Notes	Email Sent	
3/24/2015		\$50.00			x Delete

1 2. Send Invoice 1 - 1 of 1 items

Total of scheduled payments \$0.00

Save Save & Close Invoice PayPal Copy Work Sheet Shopping List Video Pull Inventory

Add Line Add Package

Description	Number of Servings	Cost Per Serving		Price Per Serving	Calculated Price	
8" Chocolate Cake with Chocolate Frosting	1	\$20.08	Edit	\$50.00	\$50.00	x Delete

Congratulations! You’ve just created a customer, created an order, and emailed an order to that customer. You’re well on your way to being a CakeBoss Pro!

Index of How-To Videos

Expenses: <https://www.youtube.com/watch?v=1S2NABi8aGw>

Invoices: <https://www.youtube.com/watch?v=ZZIz2OXsvsA>

Master Ingredients: <https://www.youtube.com/watch?v=FAvOOt6mRao>

Master Materials: <https://www.youtube.com/watch?v=evMqxYtYEUM>

Mileage Log: https://www.youtube.com/watch?v=z_grwvcffgo

My Bakery: <https://www.youtube.com/watch?v=7bPxqXr3W7c>

Order Screen Part 1 (Pricing Calculator): <https://www.youtube.com/watch?v=Z8t4vMrV14U>

Order Screen Part 2: (Payments and Photos): <https://www.youtube.com/watch?v=BccRdoyeNg4>

Packages (fixed price items): <https://www.youtube.com/watch?v=GM7vvy8XfJY>

PayPal Integration Module (Optional): https://www.youtube.com/watch?v=kgcEIn6WJ_c

Recipes: <https://www.youtube.com/watch?v=Rk0-QZk-hpA>

Sales Tax Configuration: <https://www.youtube.com/watch?v=rJY5zO706fc>

Searching and Sorting your Grids: <https://www.youtube.com/watch?v=x6cDTCQOYrQ>

Setting your own prices with the Pricing Calculator: <https://www.youtube.com/watch?v=TH826VGvZ54>

Video Tour (overview): <https://www.youtube.com/watch?v=H1Xxj3vcGc4>