

CakeBoss Cloud



Getting Started!

Important Note:

We recommend Chrome browser for best results!



Firefox or Microsoft Edge may also be used.



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

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 or margin 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 usually be page 2 of your invoice. (Terms are not attached to PayNow invoices.)

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/color blocks 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 in the CakeBoss Cloud interface. The top navigation bar includes 'Home', 'Orders', 'Customers', 'Recipes', 'Expenses', 'Reports', 'Calendar', and 'My Bakery' (highlighted with a red circle). Below the navigation bar, the 'My Bakery' section has several tabs: 'Bakery Details', 'Order Message', 'Terms', 'Employees', 'Password', 'Logo', 'Friends', 'Colors', and 'Paypal'. The 'Bakery Details' tab is active, displaying a form with the following fields and values:

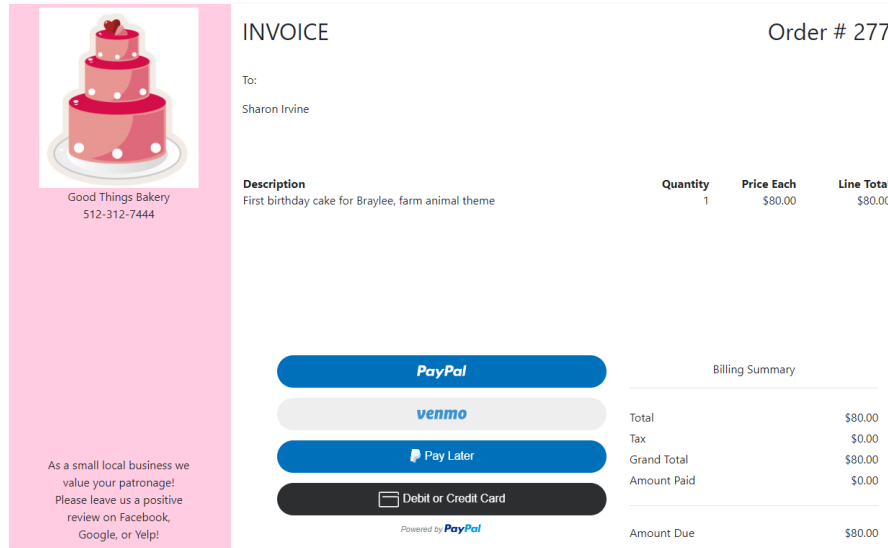
Name	Good Thingz Bakery	Web Site	https://goodthingsbakery.com
Address 1	123 Hickory St.	Email Address	cake@goodthingsbakery.com
Address 2	Ste. 100	Tax Rate	8.25% ?
City	Cedar Park	Tax Line Items	<input type="checkbox"/>
State	TX	Tax Delivery	<input type="checkbox"/>
Country Code	US	Tax Rental	<input checked="" type="checkbox"/>
Zip	78613	Hourly Rate	\$30.00
Phone	512-777-0000	Time Zone	(UTC-06:00) Central Time (US & Canada)
		Data Plan Expires	6/30/2023 Renew Data Plan

At the bottom left of the screen, a 'Save' button is circled in red, next to a 'Video' button.

2. Set up “PayNow” Invoicing

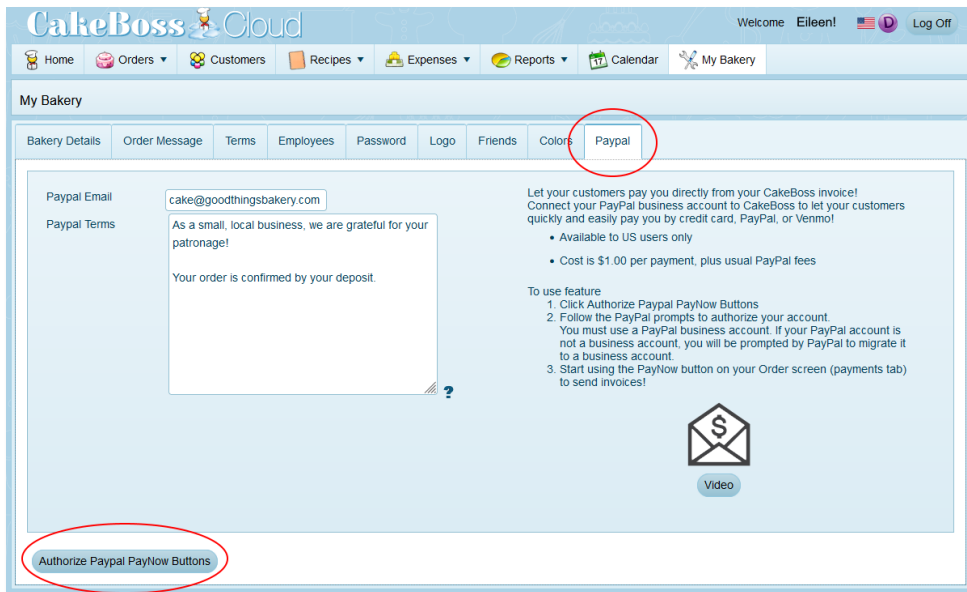
PayNow invoicing is now available to our US-based customers! PayNow invoicing links your PayPal account with CakeBoss Cloud, so that you can send invoices with convenient payment buttons: your customer can pay with PayPal, Venmo, debit, or credit just by clicking the buttons on the invoice.

Easy payment options mean you get paid faster!



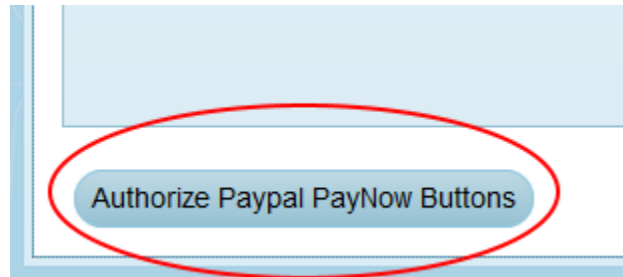
First, ensure that all the fields on your “Bakery Details” page are filled out, including “Address 2”, as PayPal requires them for the authorization process. *Pro tip: you can go back and change or delete these fields after you have completed the authorization.*

While you’re on “My Bakery”, click the PayPal tab.



PayNow Invoicing (continued)

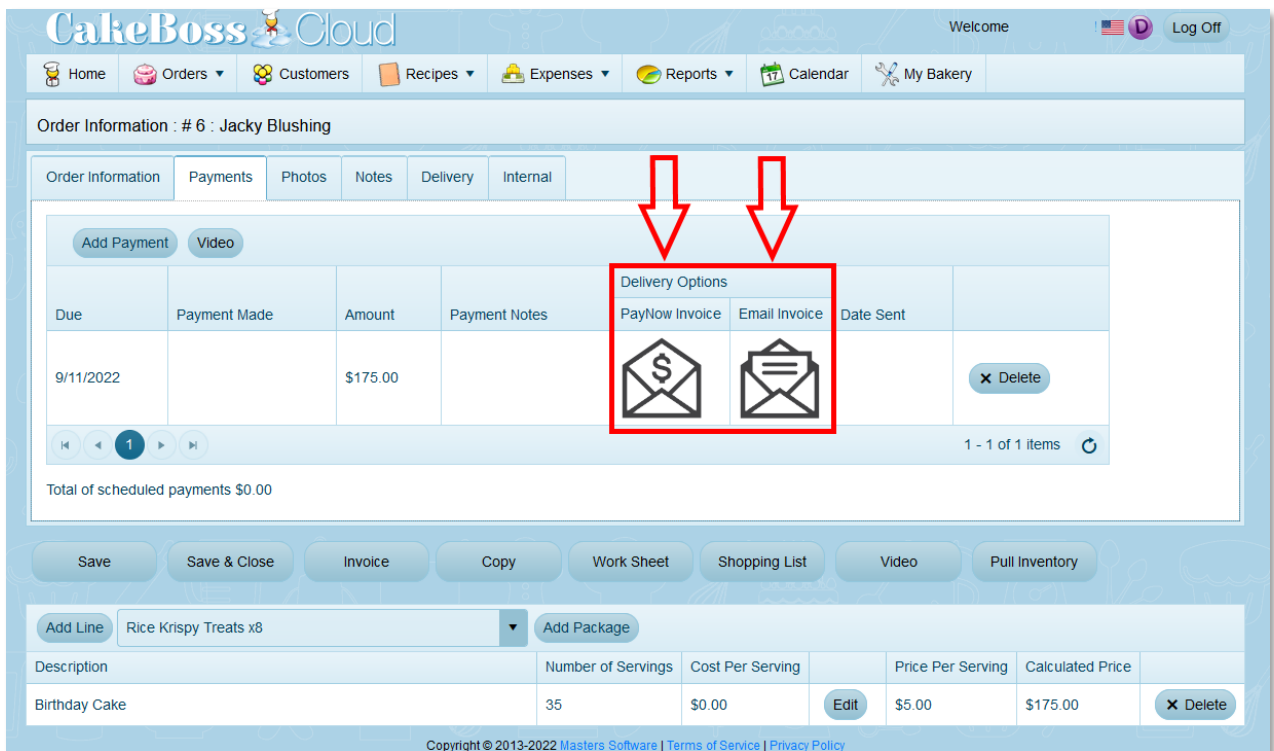
On the PayPal tab of My Bakery, click the button that says “Authorize PayPal PayNow” buttons.



Clicking this button will take you to the PayPal onboarding wizard.

Follow PayPal’s step-by-step instructions to authorize Masters Software to send invoices on your behalf. It’s fast!

After you have completed authorization, PayPal will send you back to the CakeBoss Cloud home screen. When you visit the Payments tab on your orders screen, you will see two options to deliver invoices to your customers: Email and PayNow.



The screenshot shows the CakeBoss Cloud interface. The top navigation bar includes "Home", "Orders", "Customers", "Recipes", "Expenses", "Reports", "Calendar", and "My Bakery". The main content area displays "Order Information : # 6 : Jacky Blushing". Below this, there are tabs for "Order Information", "Payments", "Photos", "Notes", "Delivery", and "Internal". The "Payments" tab is active, showing a table with columns: "Due", "Payment Made", "Amount", "Payment Notes", "Delivery Options", "Date Sent", and "Delete". The "Delivery Options" column is highlighted with a red box and contains two options: "PayNow Invoice" (with a dollar sign icon) and "Email Invoice" (with an envelope icon). Below the table, there are buttons for "Add Payment" and "Video". At the bottom, there is a section for "Add Line" with a dropdown menu showing "Rice Krispy Treats x8" and an "Add Package" button. Below this is a table with columns: "Description", "Number of Servings", "Cost Per Serving", "Price Per Serving", "Calculated Price", and "Delete". The table contains one row: "Birthday Cake", "35", "\$0.00", "\$5.00", "\$175.00".

Due	Payment Made	Amount	Payment Notes	Delivery Options	Date Sent	Delete
9/11/2022		\$175.00		PayNow Invoice Email Invoice		Delete

Description	Number of Servings	Cost Per Serving	Price Per Serving	Calculated Price	Delete
Birthday Cake	35	\$0.00	\$5.00	\$175.00	Delete

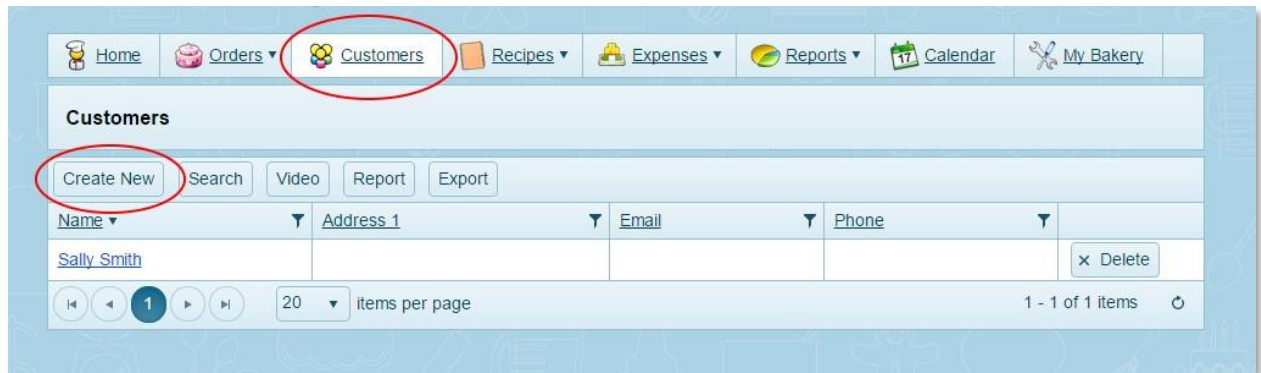
3. Import Recipes

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

The screenshot shows the CakeBoss Cloud interface. At the top, there is a navigation bar with icons and labels for Home, Orders, Customers, Recipes, Expenses, Reports, Calendar, and My Bakery. The 'Recipes' menu item is circled in red. Below the navigation bar, the 'Recipes' section is displayed. It includes a sub-navigation bar with buttons for 'Create New', 'Search', 'Master Ingredients', 'Materials', 'Import Recipes', and 'Video'. The 'Import Recipes' button is also circled in red, with a tooltip that reads 'Import recipes shared by other users'. Below the sub-navigation bar is a table of recipes. The table has columns for Name, Servings, Price, Cost per Serving, and Recipe Category. Each row represents a recipe and includes a 'Delete' button. At the bottom of the interface, there is a pagination control showing '10 items per page' and '1 - 10 of 26 items'.

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

4. Add a New Customer



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 the 'Customer Create' form. The form has several fields: Company Name (Sabre Paper Company), First Name (Sally), Last Name (Smith), Address 1 (123 Oak St), Address 2 (Ste. 2), City (Austin), State (TX), Zip Code (78750), Note (Allergic to kumquats.), Phone (512-111-1234), Mobile (512-222-2345), and Email (sallysmith@sabrepaper.com). The 'First Name' and 'Last Name' fields are circled in red. At the bottom, there are three buttons: 'Save', 'Save & Close', and 'Cancel'. The 'Save' button is circled in red.

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.

5. Start an Order

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

The screenshot displays a software interface for managing bakery orders. At the top, a navigation bar includes 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, the 'Customer Information' section is visible, containing fields for Company, First Name, Last Name, Address 1, Address 2, City, State, and Zip Code. To the right, there are fields for Phone, Mobile, Email, and a Note field containing the text 'Allergic to kumquats.'. At the bottom of the interface, there are two data tables. The first table, titled 'Orders', has columns for Order Number, Delivery Date, Category, and Grand Total. It shows 0 items and has an 'Add Order' button circled in red. The second table, titled 'Customer Dates', has columns for Special Date, Date Type, and Note. It also shows 0 items.

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).

6. Add line items to an Order

Order Information : # 6 : Jacky Blushing

Order Information | Payments | Photos | Notes | Delivery | Internal

Customer: Jacky Blushing

Order Number: 6

Order Date: 9/4/2022 3:38 PM

Delivery Date: 9/11/2022 3:38 PM

Status: New

Payment Status: Paid In Full

Category: Birthday

Referred By:

Tax Rate: 8.25%

Total: \$0.00

Delivery Charge: \$0.00

Equipment Rental: \$0.00

Tax: \$0.00

Discount: \$0.00

Grand Total: \$0.00

Amount Paid: \$0.00

Balance: \$0.00

Buttons: Save, Save & Close, Invoice, Copy, Work Sheet, Shopping List, Video, Pull Inventory

Add Line (circled in red)

Add Package

Description	Number of Servings	Cost Per Serving	Price Per Serving	Calculated Price
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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.)

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

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

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

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.

7. Schedule payments and email invoices

- (1) Schedule a payment and (2) email the invoice to your customer!
- (2) Chose to email the invoice without payment buttons or email an invoice with PayNow buttons.
- (3) The “Amount Due” on the invoice is always the amount of the next, scheduled, unpaid payment.
- (4) Payment is marked “Made” when a date is added in that cell.

Order Information : # 6 : Jacky Blushing

Order Information | Payments | Photos | Notes | Delivery | Internal

1 Add Payment Video

Due	Payment Made	Amount	Payment Notes	Delivery Options	Date Sent
9/11/2022	4	3 \$175.00		2 PayNow Invoice Email Invoice	Delete

Total of scheduled payments \$0.00

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

Add Line Rice Krispy Treats x8 Add Package

Description	Number of Servings	Cost Per Serving	Price Per Serving	Calculated Price
Birthday Cake	35	\$0.00	\$5.00	\$175.00

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!

Visit our YouTube Channel for in-depth How-To Videos!

[View our Channel](#)