



USER'S GUIDE

Bake Boost Application

<https://www.bakeboost.com/docs/>

This is the help guide for getting started with the application, and it is an ongoing document.
It will be kept updated based on any changes to the application, and you can always
download the latest version from the above link

Bake Boost Team

support@bakeboost.com

June 25, 2025

Date	Version	Comments
24-May-2025	V 1.0	
28-May-2025	V 1.1	
11-June-2025	V 1.2	Added contents for Campaigns
20-June-2025	V 1.3	Customer upload steps
25-June-2025	V 1.4	Products section added

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How to Sign Up, Login

When you click on the Get Started button, you will see this page to log in or create a new account:

Two ways to register with Bake Boost:

1. Sign up with your Google account if you have one
2. Or sign up with your email ID

Already registered? Log in here.

If you are a new user, you can create a new account from here:

5

Sign up with Google

OR

Full Name*

Liam James

Email*

mail.com

Password*

Password must be at least 8 characters and include a number and special character

Confirm Password*

✓ Passwords match

☒ I agree to the Terms of Service and Privacy Policy*

Create Account

BakeBoost

Start a Cake Shop Why Bake Boost AI Pricing Free Resources Blog Docs

Sign In

Easily Start Your Online Cakes Business

Your passion for baking can be a business to earn you money. BakeBoost is an online web application to help cake designers, decorators, bakery owners, and home bakers to manage their day-to-day tasks.

- Manage Your Bakery Business**
Track orders, inventory, and customer information
- No More Time Wasted**
Automate manual work and streamline your processes
- Say Goodbye to Spreadsheets**
All your business data in one organized platform

You will receive a 6-digit code to verify your account.

Verify your email

We've sent a verification code to your email address

Verification Code

Enter 6-digit code

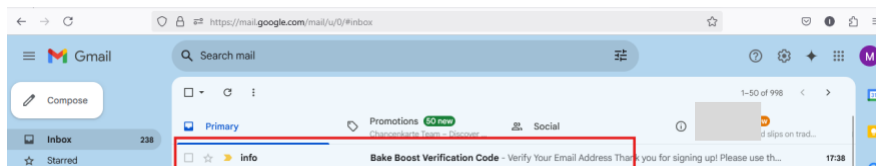
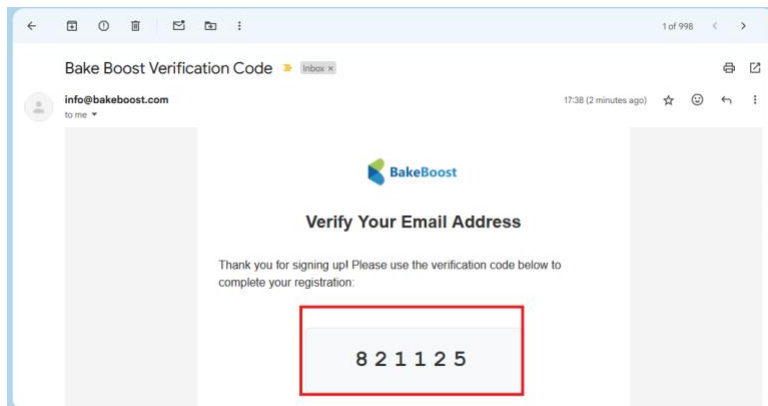
Verify Email

[Didn't receive a code? Resend](#)

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You will receive an email like this below:



Enter the code and verify your account:

← → ↻ https://app.bakeboost.com/verify-email/callbackUrl=/admin/dashboard ☆

BakeBoost Start a Cake Shop Why Bake Boost AI Pricing Free Resources Blog Docs [Logout](#)

Verify your email

We've sent a verification code to your email address

Verification Code

[Didn't receive a code? Resend](#)

[Verify Email](#)

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← → ↻ https://app.bakeboost.com/verify-email/callbackUrl=/admin/dashboard ☆

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Verify your email

We've sent a verification code to your email address

✓ Email verified successfully! Redirecting you...

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Congratulations: You have successfully registered.

← → ↻ https://app.bakeboost.com/admin/dashboard ☆

BakeBoost **Dashboard** [Welcome, Liam](#) [Congratulation 🎉🎊🎁 - Your account is created. Check your email to read more instruction](#) [Preview My Shop](#)

Let's grow your business today.

Getting Started 0% Complete

Enter your Account Details

☐ Enter your Business Details

☐ Choose your Preferences

☐ Connect your customers through WhatsApp

☐ Setup your e-commerce subdomain

Profile Picture

Choose file to upload [Choose File](#)

Liam James

Email

Full Name **Phone ***

City * **Country ***

[Logout](#)

Here you can enter your profile details and then move to the next step:

The screenshot shows the 'Getting Started' section of the BakeBoost admin dashboard. The 'Enter your Account Details' step is selected, and the progress bar indicates 0% completion. The form includes the following fields:

- Profile Picture: Choose file to upload (with a 'Choose File' button)
- Liam James (Name)
- Email: irfan.ofc@gmail.com
- Full Name: Liam James
- Phone: +1 (with a dropdown for country code)
- City: (empty)
- Country: (dropdown menu)

A red box highlights the form fields, and a red arrow points to the 'Next Step' button at the bottom right of the form.

At the second step, you will enter your business details along with the logo file, etc.

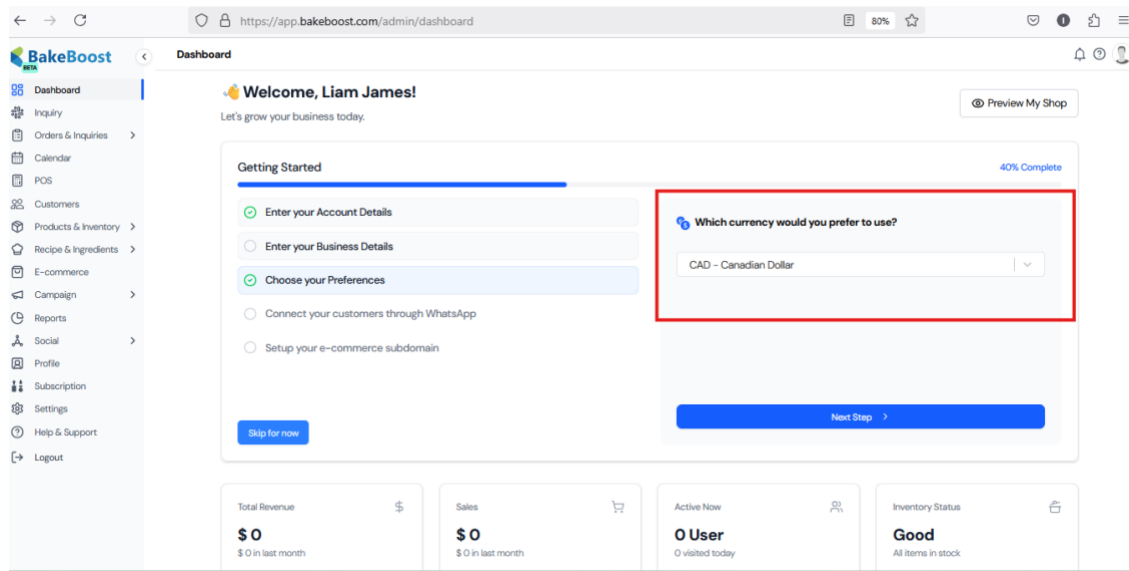
Carefully enter the email address from which you want to send emails to customers.

The screenshot shows the 'Getting Started' section of the BakeBoost admin dashboard. The 'Enter your Business Details' step is selected, and the progress bar indicates 20% completion. The form includes the following fields:

- Business Logo: Choose file to upload (with a 'Choose File' button)
- Business Name: (empty)
- Business Slogan: (empty)
- Address: (empty)
- City: (empty)
- State: (empty)
- Zip: (empty)
- Business Email: (empty) - highlighted by a red arrow
- Business Mobile Number: +1 (with a dropdown for country code)
- Time Zone: (GMT-1000) Midway Island, Samoa (dropdown menu)

A red box highlights the form fields, and a red arrow points to the 'Business Email' field.

Here you will select the currency with which you are operating.



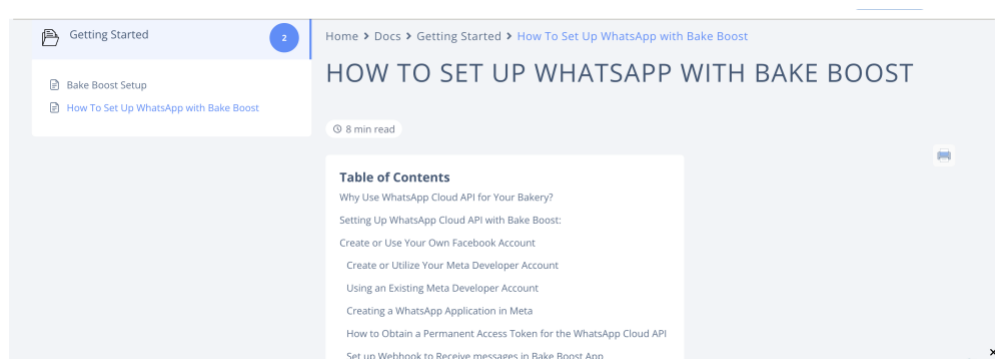
WhatsApp Business Integration:

(It's optional, you can skip it if you are not using it or want to set it up later)

Here you can set up your WhatsApp integration to boost if you want to handle your WhatsApp inquiries in the same place.

The Detailed documentation is available over this link to set up WhatsApp integration

<https://www.bakeboost.com/docs/how-to-set-up-whatsapp-with-bake-boost/>



As per the above steps, you need to enter details in the form below

BakeBoost Dashboard

Welcome, Liam James!
Let's grow your business today.

[Preview My Shop](#)

Getting Started 40% Complete

- ☒ Enter your Account Details
- ☐ Enter your Business Details
- ☒ Choose your Preferences
- ☒ Connect your customers through WhatsApp
- ☐ Setup your e-commerce subdomain

[Skip for now](#)

Setup WhatsApp cloud API Integration [help ?](#)

Whatsapp Access Token *
Enter your Whatsapp Access Token

Whatsapp Phone Number *
Enter your Whatsapp Phone Number

Whatsapp Phone Number ID *
Enter your Whatsapp Phone Number ID

Whatsapp Account ID *
Enter your Whatsapp Account ID

[Next Step >](#)

If you want to skip, you can update these later.

BakeBoost Dashboard

Let's grow your business today.

Getting Started 40% Complete

- ☒ Enter your Account Details
- ☐ Enter your Business Details
- ☒ Choose your Preferences
- ☒ Connect your customers through WhatsApp
- ☐ Setup your e-commerce subdomain

[Skip for now](#)

Setup WhatsApp cloud API Integration [help ?](#)

Whatsapp Access Token *
Enter your Whatsapp Access Token

Whatsapp Phone Number *
Enter your Whatsapp Phone Number

Whatsapp Phone Number ID *
Enter your Whatsapp Phone Number ID

Whatsapp Account ID *
Enter your Whatsapp Account ID

[Next Step >](#)

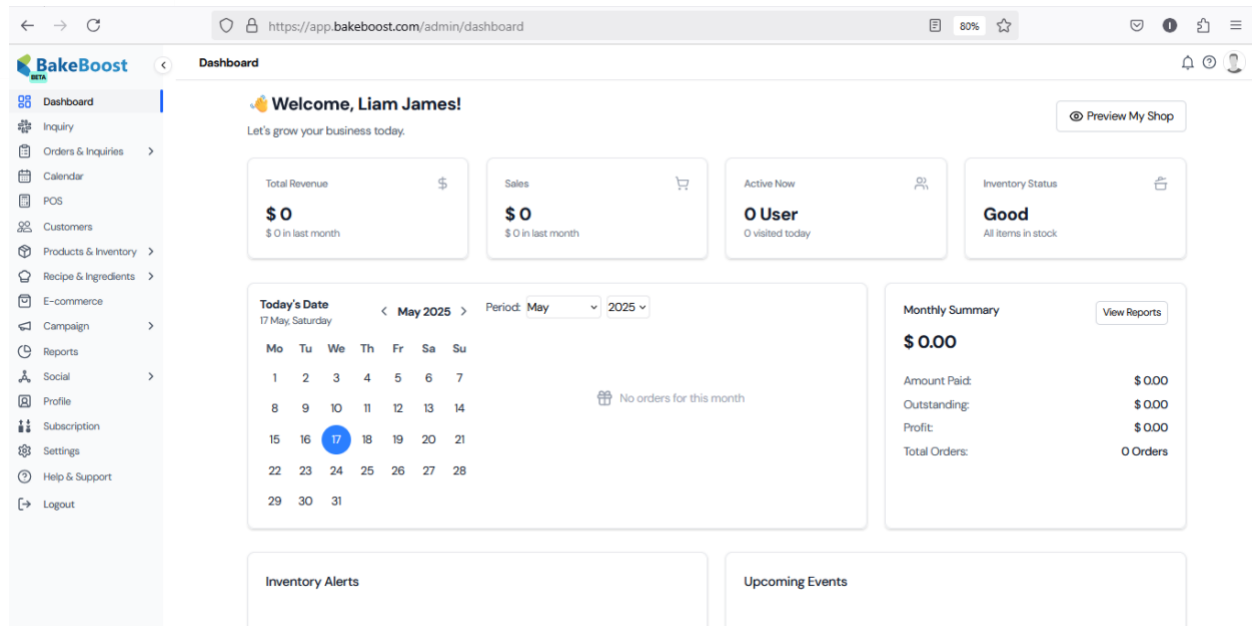
Are you sure?
This will skip all onboarding steps and you can complete them later. -

[Cancel](#) [Skip onboarding steps](#)

Total Revenue \$0 Sales \$0 Active Now 0 User Inventory Status Good

Dashboard

This is your dashboard, and it gives you a quick outlook of your business



From the left side menu, let's start with Profile

First target is to head over to the Profile page and update your profile:

Profile:

First, you should update your profile

Details from this page will be printed on the Invoices and any other documents you will send or email.

- Business name
- Logo
- Business email
- Business address
- Business Phone Number

The screenshot shows the 'Profile' page in the BakeBoost app. The left sidebar contains a menu with options: Dashboard, Inquiry, Orders & Inquiries, Calendar, POS, Customers, Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile (selected), Subscription, Settings, Help & Support, and Logout. The main content area is divided into two sections: 'Personal Information' and 'Business Information'.

Personal Information:

- Profile Picture:** A field with a 'Choose File' button.
- Bakers World:** A section header.
- Email:** alimodel99@gmail.com
- Full Name:** Bakers World
- Phone:** +1 (705) 715-4670
- City:** Barrie
- Country:** Canada

Business Information:

- Business Logo:** A field with a 'Choose File' button.
- Business Name:** Bakers World
- Business Slogan:** The best Cakes in Town
- Address:** 940 Lockhart Drive
- City:** Barrie
- State:** Ontario
- Zip:** L4M 3B1
- Business Email:** bworl@bakersworld.ca
- Website:**
- Business Mobile Number:** +1
- Time Zone:** (GMT-11:00) Midway Island, Samoa

A 'Save' button is located at the bottom right of the form.

Now let's move to the settings page

Settings:

This section is divided into multiple areas:

- Currency
- Hourly Rates
- Tax rates
- Printer settings
- Payment Gateways
- Order receiving Dates and times
- Block out dates
- Email configurations
- WhatsApp settings
- Your cake shop's Terms & Conditions
- Your Cake Shop Privacy Policy

Settings

General
Change general information of your settings

Currency
CAD - Canadian Dollar

Hourly Rate
25 \$

Tax Rates:
5% - GSTHST
[Add Tax Rate](#)

POS Printer Configuration
Configure your POS printer settings for receipt printing

- 1 Connect Your Printer**
Ensure your POS printer is connected and powered on
- 2 Enter Printer Details**
Input your printer name and select the appropriate paper size
- 3 Test Print**
Send a test print to verify the configuration

For troubleshooting and detailed setup instructions, visit our [printer setup guide](#).

Printer Name
Select printer name

Paper Size
A4
[Test Print](#)

Payment Gateways
This is the payment gateway section for receiving...

[Cancel](#) [Save](#)

Currency:

If your currency is not available, drop a message to support@bakeboost.com

Settings

General
Change general information of your settings

POS Printer Configuration
Configure your POS printer settings for receipt printing

- 1 Connect Your Printer**
Ensure your POS printer is connected and powered on
- 2 Enter Printer Details**
Input your printer name and select the appropriate paper size
- 3 Test Print**
Send a test print to verify the configuration

For troubleshooting and detailed setup instructions, visit our [printer setup guide](#).

Currency
USD - US Dollar

- USD - US Dollar
- CAD - Canadian Dollar
- EUR - Euro
- AED - United Arab Emirates Dirham
- AFN - Afghan Afghani
- ALL - Albanian Lek
- AMD - Armenian Dram
- ARS - Argentine Peso
- AUD - Australian Dollar

Hourly Rates:

Enter your hourly rates to be used in the Recipe Item

Settings

General
Change general information of your settings

Currency
CAD - Canadian Dollar

Hourly Rate
25 \$

Tax Rates:

Define your own Tax rates with the codes

Tax Rates:
Add Tax Rate

Printer Name
Select printer name

Paper Size
A4

Add Tax ✕

Tax Rate *
Tax Rate %

Tax Type *
Select...

No taxType available

+ Add new taxType

Tax Rates:
Add Tax Rate

Printer Name
Select printer name

Paper Size
A4

Add Tax ✕

Tax Rate *
Tax Rate %

Tax Type *
gsthst X

GST/HST

+ Add new taxType

Printer settings:

If you are using specific printers at your outlet, you can configure them according to your requirements.

POS Printer Configuration

Configure your POS printer settings for receipt printing

- 1 Connect Your Printer**
Ensure your POS printer is connected and powered on
- 2 Enter Printer Details**
Input your printer name and select the appropriate paper size
- 3 Test Print**
Send a test print to verify the configuration

For troubleshooting and detailed setup instructions, visit our [printer setup guide](#).

Printer Name

Select printer name

Paper Size

A4

Test Print

Payment Gateways:

This feature is still in development

Order Receiving Dates:

With these settings, you can control the order taking on the commerce

Order Receiving Dates

Set up the days and times when you'll be accepting orders

<input checked="" type="checkbox"/> Sunday	10:00 AM	5:00 PM
<input checked="" type="checkbox"/> Monday	09:00 AM	5:00 PM
<input checked="" type="checkbox"/> Tuesday	09:00 AM	5:00 PM
<input checked="" type="checkbox"/> Wednesday	09:00 AM	5:00 PM
<input checked="" type="checkbox"/> Thursday	09:00 AM	5:00 PM
<input checked="" type="checkbox"/> Friday	09:00 AM	5:00 PM
<input checked="" type="checkbox"/> Saturday	10:00 AM	5:00 PM

ⓘ Orders outside these hours will be processed the next business day

Blocked Order Dates:

You can add multiple locked dates, and your customers will not be able to place orders or send inquiries for those dates.

Blocked Order Dates

Block specific dates when you won't be accepting orders

Select Date to Block

Select a date

Reason (Optional)

e.g., Holiday, Maintenance, etc.

Block Date

Currently Blocked Dates

May 29th, 2025

Customers won't be able to place orders on these dates

Email Setup Made Easy

To configure email for invoices & communications:

1. Go to the **Settings** tab
2. Find **Email Configuration**
3. Follow the simple setup steps

Get professional emails running in minutes!

The screenshot shows the BakeBoost admin interface. The left sidebar contains navigation links: Dashboard, Inquiry, Orders & Inquiries, Calendar, POS, Customers, Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile, Subscription, Settings (highlighted), Help & Support, and Logout. The main content area is titled 'Settings' and features a red-bordered box around the 'Email Configuration' section. This section includes instructions for setting up email notifications and fields for SMTP Host, SMTP Outgoing Port (465), SMTP Username, and SMTP Password (masked with dots). Below this is the 'WhatsApp Cloud API Configuration' section, which includes fields for 'WhatsApp Access Token' and 'WhatsApp Access Token' (repeated). A 'Save' button is visible at the bottom right of the settings area.

If you need to get these settings from your email provider, detailed instructions are [available on this link](#)

WhatsApp Business API configuration:

Follow the steps outlined in the application and the detailed online documentation. You need to have your phone number set up for WhatsApp Business, and any associated charges or costs must be covered as part of your WhatsApp Business account.

This screenshot shows the 'WhatsApp Cloud API Configuration' section of the BakeBoost admin interface. It includes a list of steps for setting up the API: 1. Create a Meta Developer Account, 2. Create a Meta App, 3. Add WhatsApp product, 4. Set up WhatsApp Business Account, 5. Get API credentials, and 6. Configure Webhook. The 'Configure Webhook' step provides a callback URL and a verify token. To the right of these instructions are input fields for 'Whatsapp Access Token', 'Whatsapp Phone Number', 'Whatsapp Phone Number ID', and 'Whatsapp Account ID'. A 'Save' button is located at the bottom right of the configuration area.

Terms & Conditions

Here you can specify your own cake shop or store terms & conditions and Privacy Policy

Terms and Conditions

Add terms and privacy policy here. These will appear on invoices and e-commerce pages for customers.

Terms & Conditions

All cancellation requests must be submitted a minimum of three business days prior to your scheduled pick up. Once preparation and baking has commenced, there are no refunds provided for cancellations or modifications. However, at its sole discretion, Cakes may grant cancellation and/or full or partial refunds after orders are baked depending on circumstance. For order cancellation or modification requests, please contact our Customer Service Team by

Privacy Policy

we are committed to the highest privacy

Microsoft Outlook

Cancel

Save

You are now done with the settings.

Let's move to each Feature available in the Bake Boost application.

Inquiry

All inquiries received via WhatsApp will be displayed here. This is the WhatsApp Inquiry form. You can update it at any time and handle your inquiries here, responding to them from the same page.

This form will not appear until you have completed setting up your WhatsApp according to the guide available here.

<https://www.bakeboost.com/docs/how-to-set-up-whatsapp-with-bake-boost/>

The screenshot shows the BakeBoost admin interface. On the left, a sidebar menu lists various sections: Dashboard, Inquiry (highlighted with a red box), Orders & Inquiries, Calendar, POS, Customers, Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile, Subscription, Settings, Help & Support, and Logout. The main content area is titled 'Inquiry' and contains a warning box with the text: 'Ensure that these requirements are met: Created Whatsapp Business account, Setup Webhook properly on facebook developer account, Pass "https://app.bakeboost.com/bakeboost_webhook" this url as webhook callback url and your user email "trfanofc@gmail.com" as Verify token, Fill below field with correct value'. Below the warning box are four input fields: 'Whatsapp Access Token', 'Whatsapp Phone Number', 'Whatsapp Phone Number ID', and 'Whatsapp Account ID'. A blue 'Save' button is located at the bottom of the form.

The guidance on setting up WhatsApp is also available in

Settings:

Inquiry

Orders & Inquiries >

Calendar

POS

Customers

Products & Inventory >

Recipe & Ingredients >

E-commerce

Campaign >

Reports

Social >

Profile

Subscription

Settings

Help & Support

WhatsApp Cloud API Configuration

Follow these steps to configure the WhatsApp Cloud API

- Create a Meta Developer Account**
Go to developers.facebook.com and sign up for a developer account if you don't have one
- Create a Meta App**
In the Meta Developers dashboard, create a new app and select "Business" as the app type
- Add WhatsApp product**
In your app's dashboard, click on "Add Product" and select "WhatsApp"
- Set up WhatsApp Business Account**
Follow the prompts to set up or connect your WhatsApp Business Account
- Get API credentials**
Locate your WhatsApp Business API phone number ID and access token in the app settings
- Configure Webhook**
In the WhatsApp settings, set the following:
 Callback URL: https://app.bakeboost.com/bakeboost_webhook
 Verify Token: bakeboost@gmail.com

For detailed API documentation and integration guides, visit the [WhatsApp Cloud API documentation](#)

Whatsapp Access Token

Whatsapp Phone Number

Whatsapp Phone Number ID

Whatsapp Account ID

Orders & Inquiries

From this Orders and Inquiries menu, you can manage your inquiries and keep them on record for future reference.

Two ways to manage inquiries

1. Manual creation of an inquiry (maybe you got it on the phone, or Facebook, etc.)
2. Inquiries coming from your Inquiry Page

Manual Creation of Inquiry:

The screenshot shows the BakeBoost admin dashboard. On the left is a sidebar menu with options like Dashboard, Inquiry, Orders & Inquiries, and various product and campaign management tools. The 'All Inquiries' option under 'Orders & Inquiries' is highlighted with a red box. The main content area is titled 'All Inquiries' and features a search bar, a 'Filter' dropdown, and a 'Create Inquiry' button (indicated by a red arrow). Below these is a table with columns for Customer, Mobile Number, Product Category, Event Date, and Final Status. The table currently shows 'No results.' At the bottom, there are pagination controls showing '0 of 0 row(s) selected', 'Rows per page' set to 10, and 'Page 1 of 1'.

If the inquiry is from an existing customer, you can select and save or create a customer.

Manage Inquiries with One Click!

From the **Final Status** tab, easily update any inquiry to:

- ✓ **In Process** - Actively working on
- ✓ **Convert to Order** - Turn into confirmed business
- ✓ **Closed** - Completed successfully
- ✓ **Lost** - Didn't proceed (data saved for future)

Stay organized and never miss follow-up opportunities!

Boost Conversions with Thoughtful Follow-Ups!

Save customer inquiries with their event dates, then reach out before the date to check if they'd like to proceed. This personal touch shows you care and often brings back pending orders!

Create Inquiry ×

Create a new inquiry for

Details

3 tier wedding cake from Mrs. Alice

Social channel Select ▼

Customer Channel Link

Expected date mm / dd / yyyy 📅

Expected time --:-- --

Event date mm / dd / yyyy 📅

Descriptions

Internal note

Final status Select ▼

Assigned to

Close Create

Inquiries coming from your Inquiry Page

Inquiries coming from your Inquiry Page *(you will have the steps later in this document, on how to set up)*

Inquiry #cmb2bl6b ×

Customer Information		Event Details	
Name Raimy Klein	Contact Number 738739973	Event Type Birthday	Event Date May 30th, 2025
Email klein@gmail.com	Mobile Number N/A	Event Theme 1st birthday	Expected Date N/A
Email ID (Secondary) N/A	Address sweet home	Servings 20	Expected Time N/A
Mailing List Yes	Social Channel N/A		

Order Details		Internal Information	
Cake Type layer	Product Category N/A	Final Status In Progress	Assigned To N/A

Cancel Edit

Full Inquiry Control

Easily edit or delete inquiries anytime using the **"Manage Inquiries"** option. Keep your records clean and up to date with just one click!

← → ↺ <https://app.bakeboost.com/admin/all-inquiries> 🔖 ⭐ 🔔 ⚙️ 👤

BakeBoost < **All Inquiries** 🔔 ⚙️ 👤

📊 Dashboard
📋 Inquiry
📦 Orders & Inquiries ▼
 📅 All Inquiries
 ⚙️ Inquiry Settings
 📦 Orders
 📅 Calendar
 📋 POS
 👤 Customers
 📦 Products & Inventory >
 📋 Recipe & Ingredients >
 📦 E-commerce
 📋 Campaign >
 📋 Reports
 👤 Social >
 📋 Profile
 📋 Subscription

🔍 Search inquiries... 🔄 ⬇️ ⚙️ Create Inquiry 📋

<input type="checkbox"/>	Customer ↑↓	Mobile Number ↑↓	Product Category	Event Date ↑↓	Final Status ↑↓	
<input type="checkbox"/>	John Lee	07996578923		28-05-2025	In process	...

0 of 1 row(s) selected. Rows per page 10 Page 1 of 1 << < > >>

Two Ways to Add Customers:

- 1- **Customer Tab** - Create customer profiles directly
- 2- **Inquiry Tab** - Automatically add when creating new inquiries

Build your client database effortlessly!

Create Inquiry

Create a new inquiry for

Connect Customer

Customer not selected

No customer available

+ Add new Customer

Mobile Number

Product category

Select_

Details

3 tier wedding cake from Mrs. Alice

Social channel

Select

Customer Channel Link

Expected date

mm / dd / yyyy

Expected time

--:-- --

Event date

mm / dd / yyyy

Descriptions

Close

Create

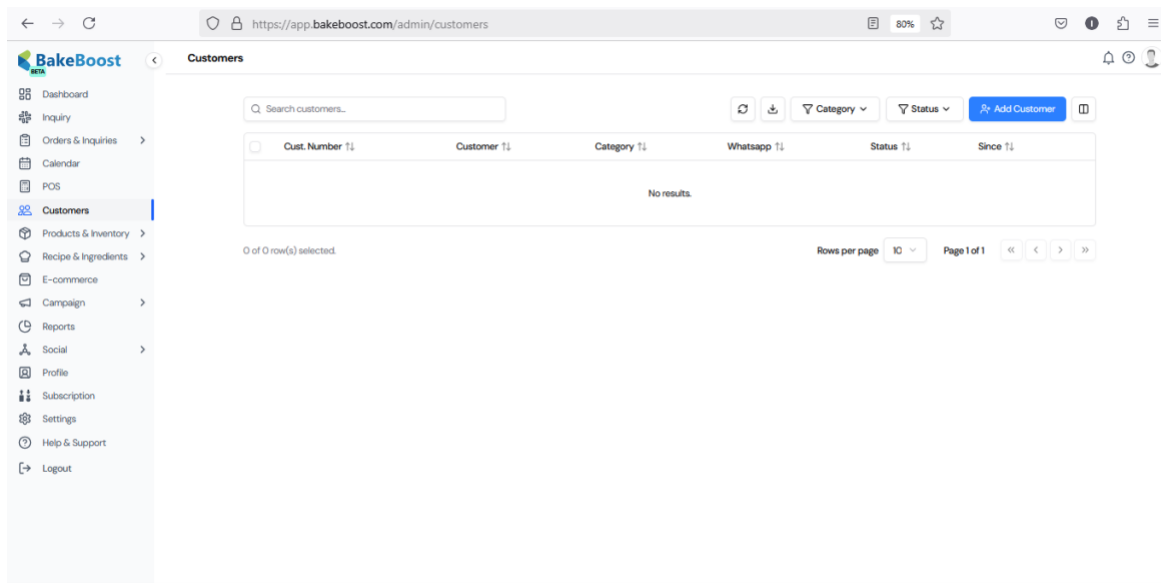
Customer Management Made Easy

Bake Boost – the everything app for bakers

Use the Customer tab to:

- ◆ Create new customer profiles
- ◆ Search by name or category (Platinum/Gold/Silver/Bronze)
- ◆ Filter active/inactive customers
- ◆ Export complete customer data

Categorize customers by purchase value for smarter marketing!



Customer Profile Management

Store complete customer details in one place:

- Full name (First + Last)
- Primary Mobile / WhatsApp number
- Email address
- Multiple contact numbers

Smart Customer Categorization

Easily segment your customers by:

- **Purchase Value:** Platinum, Gold, Silver, Bronze, or any Overseas gift for someone in your area.

Plus:



Assign unique customer IDs (For example, your bakery name is Sweet Bakers, you can start this sequence SB-01, SB-02, SB-03)



Track buying patterns at a glance

Pro Tip: Use categories for targeted promotions!

Flexible Delivery / Shipping Options

Easily save alternate shipping addresses when customers order gifts! Use the **"Different Shipping Address"** option to:

- Store multiple addresses in customer records
- Save PIN locations for future deliveries
- Quickly access saved addresses for repeat orders

Never ask for the exact address twice!

The screenshot shows the 'Create Customer' form with the following sections:

- Personal Information:** First Name (John), Last Name (Lee), Whatsapp Number (+1 (584) 343-569), Customer Category (Diamond), Unique Number (LIA-02).
- Contact Details:** Email, Mobile Number 1 (+1), Mobile Number 2 (+1).
- Billing Address:** Name, Mobile Number (+1 (584) 343-569), Address, Town, City, Country (Select...).
- Shipping Address:** A checkbox labeled 'Same as billing address' is checked.

A red box highlights the '+ Add another shipping address' button at the bottom left, with a red arrow pointing to it from the right. At the bottom right are 'Close' and 'Save' buttons.

Create Customer

Name

Mobile Number

House/street/block

Town

City

County

Google map location

[+ Add another shipping address](#)

[Close](#) [Save](#)

Your Complete Customer Hub

All customer profiles appear here with powerful search tools to:

- **Find** customers by name, category, or status
- **Filter** active/inactive clients
- **Download** complete customer data
- **Organize** with custom categories

Every customer detail at your fingertips!

BakeBoost Customers

Search customers...

Category Status Add Customer

<input type="checkbox"/>	Cust. Number ↑↓	Customer ↑↓	Category ↑↓	Whatsapp ↑↓	Status ↑↓	Since ↑↓	
<input type="checkbox"/>	LIA-01	Wesly Nort	Platinum	15847856975	Active	May 17, 2025	...

0 of 1 row(s) selected. Rows per page: 10 Page 1 of 1

Customer Contacts upload

Our Target solution is to provide you with the option to import master data from Excel/CSV templates, making it available to everyone and allowing them to organize their data for import into Bake Boost.

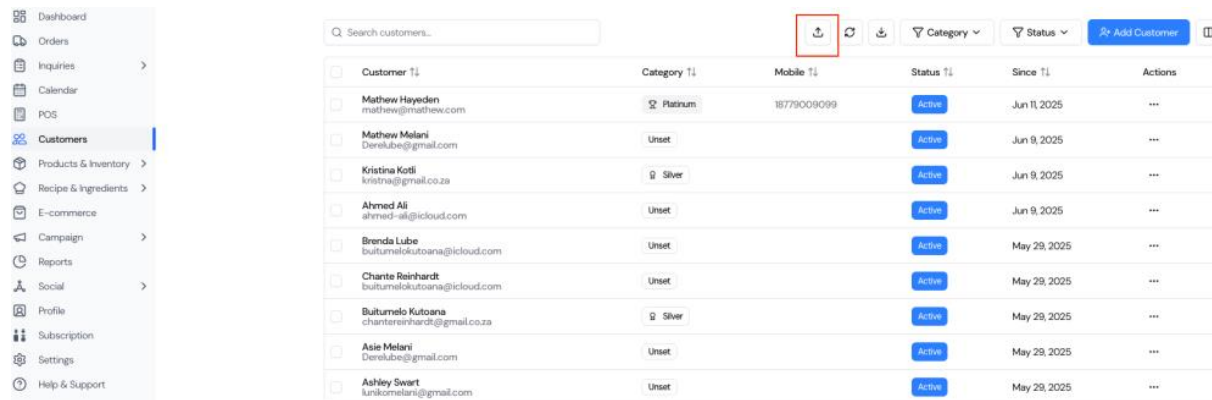
As of this update, our focus is on supporting Master Data, which includes your contacts/customers, Products, and Ingredients. No transactional data, such as your order history from the last two or five years, can be loaded.

You may have old data to upload to the Bake Boost app. To import or upload from any other application, follow the process below. The prerequisite is that you have the data in CSV format.

Customer contacts Upload/Import to Bake Boost

Go to your Customers Menu

and click on the Import Button



The screenshot shows the Bake Boost app interface. On the left is a sidebar menu with options: Dashboard, Orders, Inquiries, Calendar, POS, Customers (highlighted), Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile, Subscription, Settings, and Help & Support. The main area displays a 'Customers' list. At the top of this list is a search bar and a toolbar with icons for import, refresh, export, filters, and a 'Add Customer' button. The 'Import' icon (a square with a downward arrow) is highlighted with a red box. Below the toolbar is a table of customers.

Customer	Category	Mobile	Status	Since	Actions
<input type="checkbox"/> Mathew Hayden mathew@mathew.com	Platinum	16779009099	Active	Jun 11, 2025	...
<input type="checkbox"/> Mathew Molani Danelube@gmail.com	Unset		Active	Jun 9, 2025	...
<input type="checkbox"/> Kristina Kotli kristina@gmail.co.za	Silver		Active	Jun 9, 2025	...
<input type="checkbox"/> Ahmed Ali ahmed-ali@icloud.com	Unset		Active	Jun 9, 2025	...
<input type="checkbox"/> Brenda Lube butumelokutoana@icloud.com	Unset		Active	May 29, 2025	...
<input type="checkbox"/> Chante Reinhardt butumelokutoana@gmail.com	Unset		Active	May 29, 2025	...
<input type="checkbox"/> Butumelo Kutoana chantereinhardt@gmail.co.za	Silver		Active	May 29, 2025	...
<input type="checkbox"/> Asie Melani Danelube@gmail.com	Unset		Active	May 29, 2025	...
<input type="checkbox"/> Ashley Swart lunkomelani@gmail.com	Unset		Active	May 29, 2025	...

It will open this Form and in this form download the Sample File:

Import Data
×

Upload File

Download Sample

Drop your CSV or Excel file here, or click to browse

Choose File No file chosen

Expected Columns

Note: Your CSV/Excel file should use these exact column names (case-sensitive):

Required (1 columns)

firstName

Optional (8 columns)

lastName

email

customerWhatsappNumber

customerCategory

mobileNumber

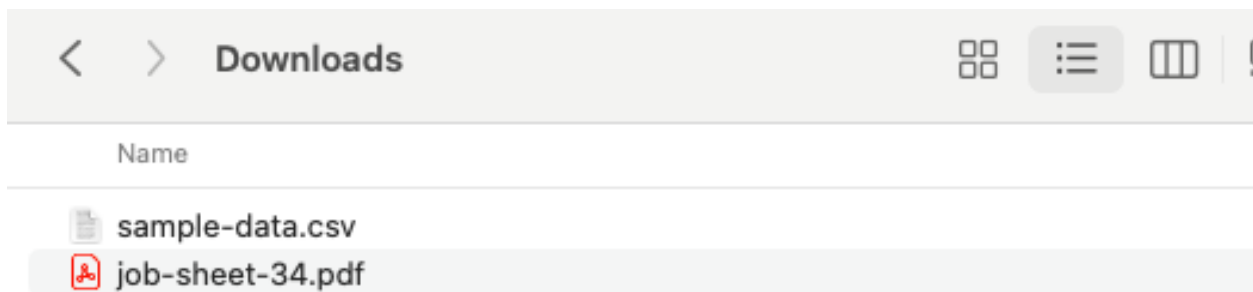
gender

ageGroup

internalNotesOrPersonalInformation

View column details ▾

Once you download the Sample file, it will prompt you to save it to your local desktop/laptop.



Open this 'sample-data.csv' file in Microsoft Excel and it will look like below:

	A	B	C	D	E	F	G	H	I	J	K
1	firstName	lastName	email	customerWhatsappNumber	customerCategory	mobileNumber	gender	ageGroup	internalNotesOrPersonalInformation		
2	Sample First Name	Sample Last Name	Sample Email	Sample WhatsApp Number	Sample Category	Sample Mobile Number	Sample Gender	Sample Age Group	Sample Notes		
3	Mathew	Hayeden	mathew@mathew.com	18779909099	Platinum	18779009099					
4	Mathew	Melani	Dereube@gmail.com	664760830							
5	Kristina	Kotli	kristna@gmail.co.za	745780784	Silver						
6											
7											
8											
9											

This file is vital to use as it is, key things to remember.

- Do not change the name of the columns
- Do not change the position of the columns
- Do not delete the First header row

You can remove the rows from 2-5. This is sample data to show you what it will look like when you upload your data.

Now you need to copy the columns of your data into the respective data columns

- First Name into the 'firstName' column
- Last name into the 'LastName'
- email into the 'email'
- Phone number into the 'customerWhatsappNumber'
- Similarly, fill in the other columns with your actual data

Your file should look like this, and now it is ready to be uploaded in the Bake Boost App

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	firstName	lastName	email	customerWhatsappN	customerCategory	mobileNumb	gender	ageGroup	internalNotesOrPersonalInformation					
2	Rickit	Pendessy	rickitrendessy1@gm	48025238679										
3	Matt	Ksaro	mattlimpasto2020@	48025273867										
4	Sirini	Ngongor	sirinfonkamr@yaho	8562641907										
5	Frank		co_valdes@rc623-5											
6	Kayli		nnakai33@gn	4591										
7	Matt		son3@yahoc	0996										
8	Morr		0x@yahoo.com											
9	Lisa		ez51@hotmail	2067										
10	Cam		.ca@yahoo.c 347-2											
11	Ange		a.parrish21@gmail											
12	Katie		msyck@gma	9635										
13	Jubil		trinitie@gma	7601										
14	Taylc		tr@gmail.com	4357										
15	Tish		ngebrew@gn 623-6											
16	Jenn		entable@gma	2905										
17	Chef		on.luxcatering 480-5											
18	Rhor		ttmom@gma 480-2											
19	Vivia		avison88@gmail.co											
20	Can		@chefsshari	7028										

Now, come back to the Customer and Import feature:

Import Data
×

Upload File
Download Sample

Drop your CSV or Excel file here, or click to browse

Choose File No file chosen

Expected Columns

Note: Your CSV/Excel file should use these exact column names (case-sensitive):

Required (1 columns)

firstName

Optional (8 columns)

lastName email customerWhatsappNumber customerCategory mobileNumber

gender ageGroup internalNotesOrPersonalInformation

View column details ▾

Click on Choose File and select your sample-file updated with the actual data.

Once you select the file, it will show you a list, and you click on the 'Import' button.

Import Data
×

Preview Import Data
Back to Upload

123 valid row(s)

First Name	Last Name	Email	WhatsApp Number	Category	Mobile
Rickit	Pendessy	rickitrendessyl@...	48025238679	-	-
Matt	Ksaro	mattimpasto20...	4802523867	-	-
Sirini		mr@y...	07	-	-
Frankie		_valdes...	808	-	-
Kayliyah		kai33...	91	-	-
Matt		on3@y...	96	-	-
Momo		@yah...		-	-
Lisa		51@hotmail...	7	-	-
Cameisha		@yaho...	698	-	-
Angelika		arrish21...	-	-	-

... and 113 more rows

Cancel
Import 123 Row(s)

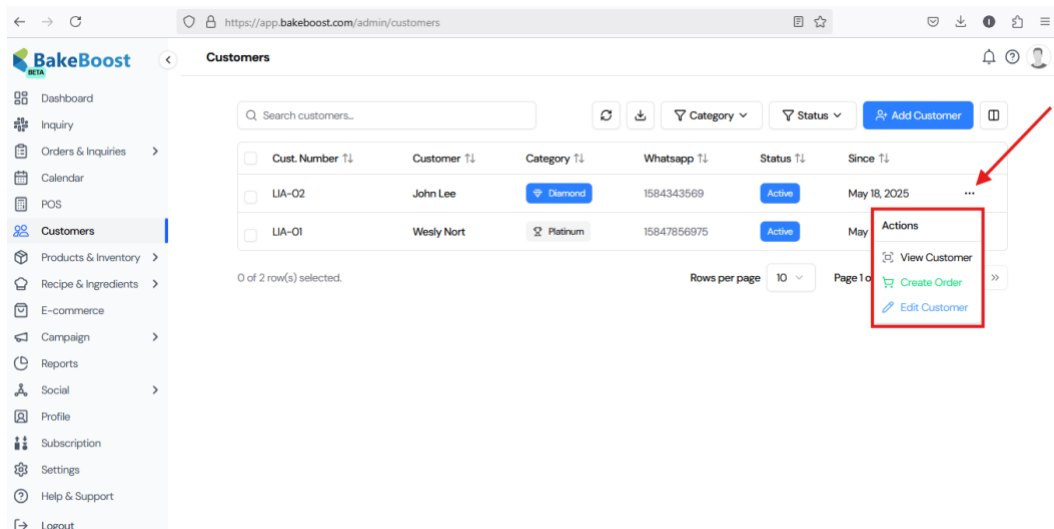
If you have a large data file, we suggest breaking it into smaller files, and you can upload them multiple times to the application. This will help you avoid errors and make the upload process smoother.

Quick Customer Actions

Click the **(3-dot menu)** beside any customer to:

- **View** full customer details
- **Edit** profile information
- **Create** a new order instantly

Manage customers faster with one-click access!



Order Management

This is an **"Orders Overview"** page from an order management system. It displays a summarized list of orders with essential details in a tabular format. Here's a description based on the fields shown:

◆ Header Options

- **Search users:** A search bar to find orders by customer name or user ID.
- **Filter:** Allows advanced filtering of the order list.
- **Create order:** Button to initiate a new order.

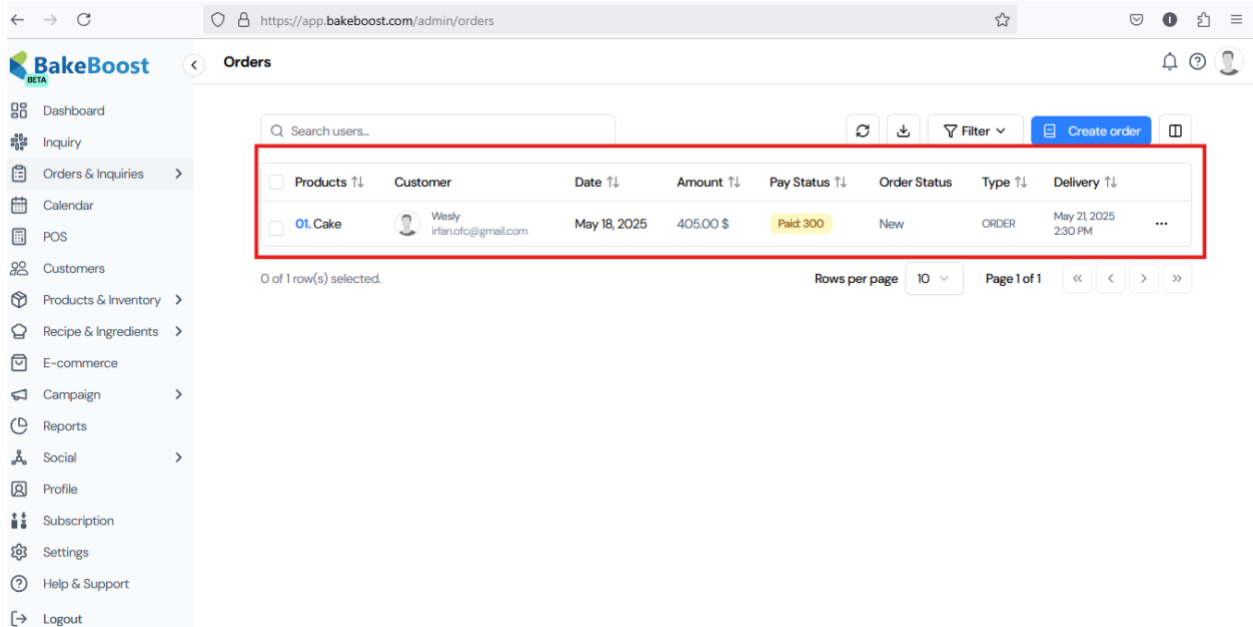
- **Refresh, Download, and More Options:** Includes actions to refresh data, export orders, or apply additional settings.

◆ **Order List Table Columns**

1. **Products:** Displays product count or reference name.
Example: 01. Cake (likely indicates the first product in the order is a cake).
2. **Customer:** Displays the customer's name along with an avatar or profile icon.
Example: Wesley
3. **Email will also show under the customer's name**
4. **Date:** The date when the order was placed.
Example: May 18, 2025
5. **Amount:** Total amount of the order.
Example: 405.00 \$
6. **Pay Status:** Payment details, including the amount paid.
Example: Paid: 300 (indicates partial payment)
7. **Order Status:** Status of the order.
Example: New
8. **Type:** Indicates the type of entry, such as ORDER.
9. **Delivery:** Scheduled delivery date and time.
Example: May 21, 2025 - 2:30 PM

◆ **Pagination and Row Settings**

- **Rows per page:** Set to show 10 rows.
- **Page navigation:** Indicates current page (Page 1 of 1) with navigation controls.



When you add or update the customer

New Order Form

This is a **"New Order"** interface screen. Here is a breakdown of the interface, organized by the available fields.

◆ Order Overview (Left Panel)

- **Customer:** Dropdown to select an existing customer.
- **Type:** Pre-filled as "Order" (types like quote, order, etc. can be chosen).
- **Order No:** Numeric field for the order number (e.g., "01").
- **Delivery Date/Time:** A date and time picker to schedule delivery.
- **Event:** Select the event type from the dropdown (e.g., Birthday, Anniversary).
- **Theme:** Text field to describe the theme of the order (e.g., Elegant, Cartoon, Floral).

◆ Order Details (Right Panel)

- **Delivery Type:** Dropdown to select type of delivery (e.g., Home delivery, Collected / Pick-up).

- **Order Status:** Dropdown, default set to "New" (other statuses may be In Progress, Completed, etc.).
- **Deliver to:** Enter the delivery address in the text area.
- **Instructions:** Enter special instructions from the customer in the text area.
- **Message on Board/Card:** Text area for custom messages for cards or cake boards.

◆ Image Uploads

- **Choose a file to upload:** Field to attach a reference image (e.g., design inspiration, message card layout).

◆ Order Product's Information (Bottom Left Section)

- **Search product:** Field to search and select products to include in the order.
- **Quick Add:** Button to quickly add products.
- **Add Item:**
 - Add Product
 - Recipe Item

◆ Other Information (Optional) (Bottom Right Section)

- **Add attribute:** Option to enter any other custom attributes relevant to the order.

◆ Action Buttons (Bottom Center)

- **Cancel:** Discard the order.
- **Save order:** Save the current order details.
- **Proceed to Pay:** Move to the payment step.

Order Overview

Customer: Wesley Nort

Type: Order

Order No: 01

Delivery Date / Time: 05/21/2025, 02:30 PM

Event: Birthday

Theme: Carbon

Order Details

Delivery Type: Self Pickup from Outlet

Order Status: New

Instructions: Pink color rather than blue as its for baby girl

Message on Board/Card: Happy Birthday Iha

Image Uploads

1 file uploaded

Order Product's Information

Select products to include into this order

Search product:

Product Name	Quantity	Price (CAD)
No selected products		

Total Items: 0

Subtotal: CAD 0.00

Discount: 0.00 CAD

Shipping / Delivery: 0.00 CAD

Total: CAD 0.00

Other Information (Optional)

Other attributes

Buttons: Cancel, Save order, Proceed to Pay

Quick Add Any Product

Use the **Quick Add** option to create instantly:

- One-time items (not in your catalog)
- Popular products like:
 - Cakes | Cookies | Cupcakes
 - Donuts | Cake Pops | Toppers

Perfect for custom/special orders!

Order Overview

Customer: Amelia Arthur

Type: Order

Order No: 13

Date / Time: dd/mm/yyyy, --:-- --

Event: Birthday

Theme: Enter details about the theme of the order

Order Details

Delivery Type: Select

Order Status: New

Deliver to: 3178 Higginsville Road, BON 2S0, Waverley, Canada

Instructions: Enter instruction provided by the customer

Message on Board/Card: Enter Message on Board/Card, Message on Board, Message on Card

Image Uploads

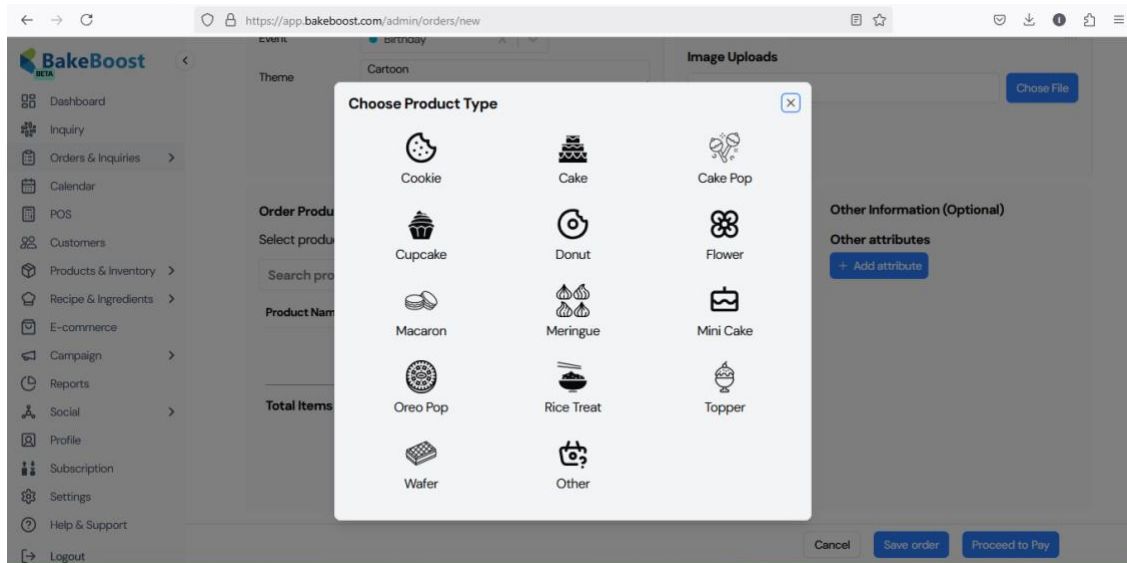
Choose file to upload

Order Product's Information

Add items to include into this order

+ Add Item + Quick Add

Item	Qty	Price (\$)

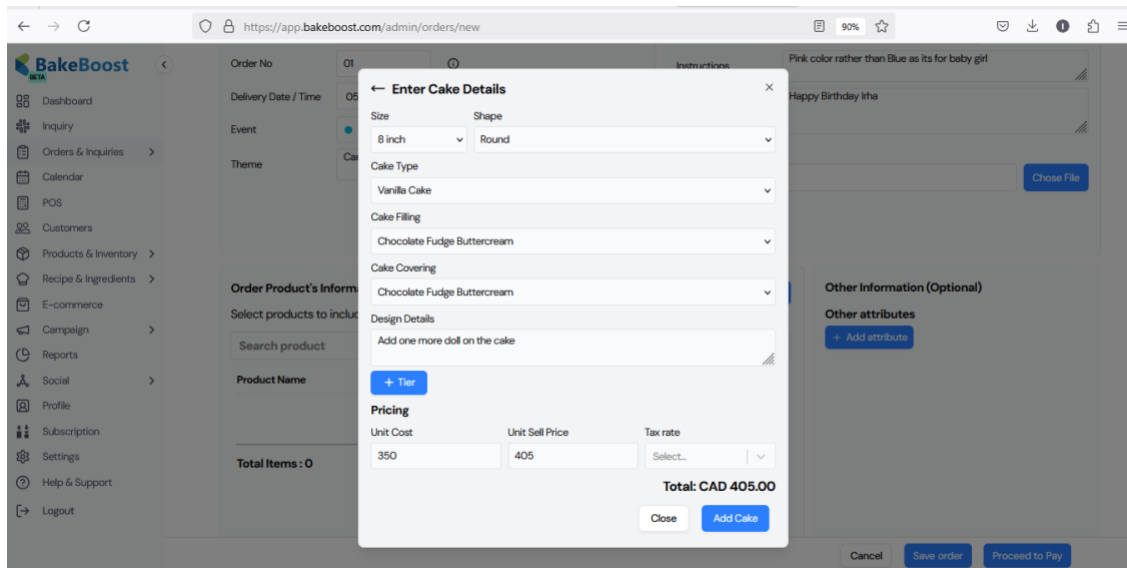


Custom Cake Ordering

Add precise cake details in seconds:

- **Size & Shape**
- **Type & Filling**
- **Covering** (Fondant/Fresh Cream)
- **Custom Design Notes**

Perfect for capturing every special request!



Finalize Custom Cake Orders

All custom cake details appear here for your review before payment. Verify every specification, then click **"Save"** at the bottom to confirm.

Cake - [Edit](#)

Size: 8

Shape: Round

1

+

\$ 180.00

Total Items : 1

Subtotal :

\$ 180.00

Discount : 0.0

\$ 0

Shipping cost: 0.0

\$ 0

Total :

\$ 180.00

Gross Profit: ⓘ

\$ 114.61

Your profit amount is not included in any print outs or PDFs.

[How is this calculated?](#)

Job Sheet Details

[Job Sheet](#)

Job sheet will be generated as a PDF with all order details, customer information, products, tasks, and special instructions.

⚠ Save the order first to enable job sheet generation.

Other Information (Optional)

Internal note

Note

Other attributes

Cancel

Proceed to Pay

Save order

After saving the Order, you will be taken to the main Orders dashboard.

Click the three dots > View Order

Q Search users...










↺

↻

Filter

Create order

☰

<input type="checkbox"/> Products ↑↓	Customer	Date ↑↓	Amount ↑↓	Pay Status ↑↓	Order Status	Type ↑↓	Delivery ↑↓	
<input type="checkbox"/> 13. Cake	 Amelia amelia@gmail.com	May 26, 2025	180.00 \$	Unpaid	New	ORDER	Jun 6, 2025 11:34 AM	...
<input type="checkbox"/> 12. Hulk cake	 Jacob bakeboost@gmail.com	May 25, 2025	39.02 \$	Unpaid	New	ORDER	<div>Actions</div> <div>Edit Order</div> <div>View Order</div> <div>Print Invoice</div> <div>Refund order</div> <div>Delete order</div>	
<input type="checkbox"/> 11. Rainbow Cake +1 more products	 Amelia amelia@gmail.com	May 25, 2025	170.00 \$	Unpaid	New	ORDER		
<input type="checkbox"/> 10. Cake	 Jacob bakeboost@gmail.com	May 25, 2025	175.00 \$	Unpaid	New	ORDER		
<input type="checkbox"/> 09. Rainbow Cake	 Jacob bakeboost@gmail.com	May 14, 2025	50.00 \$	Unpaid	New	ORDER		
<input type="checkbox"/> 08. Rainbow Cake	 Amelia amelia@gmail.com	May 14, 2025	50.00 \$	Paid: 1	Delivered	ORDER	May 14, 2025 5:57 AM	...
<input type="checkbox"/> 07. Cake	 Amelia amelia@gmail.com	May 14, 2025	70.00 \$	Paid: 30	New	ORDER	May 29, 2025 5:21 PM	...
<input type="checkbox"/> 06. Chocolate Fudge C...	 Jacob bakeboost@gmail.com	May 14, 2025	58.00 \$	Unpaid	New	ORDER	May 24, 2025 9:03 AM	...
<input type="checkbox"/> 05. Red Velvet Cake	 Jacob bakeboost@gmail.com	May 13, 2025	49.99 \$	Paid: 20	New	ORDER	May 30, 2025 9:32 PM	...
<input type="checkbox"/> 04. Birthday Cake	Not selected	Apr 10, 2025	170.00 \$	Paid	Delivered	POS	Apr 10, 2025 8:33 AM	...

View Order:

On this page, you can record your Payments, schedule payments, download an invoice, send an email, or download Job sheet details.

Items included in this order

Item	Qty	Price (\$)
Cake - View Size: 8 Shape: Round	x1	\$ 180.00
Total Items :1		Subtotal: \$ 180.00 Discount: \$ 0 - \$ 0 Shipping cost: \$ 0 \$ 0 Total: \$ 180.00
		Gross Profit: ⓘ \$ 114.61 <small>Your profit amount is not included in any print outs or PDFs.</small> How is this calculated?

[Invoice](#)
[Email](#)
[Add Payment](#)

Scheduled Payments [+ Add](#)

No scheduled payments found.
[Add your first payment](#)

Job Sheet Details (View Mode) [Job Sheet](#)
 Job sheet available for order #13
 Click the download button to generate the latest job sheet PDF

Order Tasks [+ Add](#)
 No tasks found for this order.
[Add your first task](#)

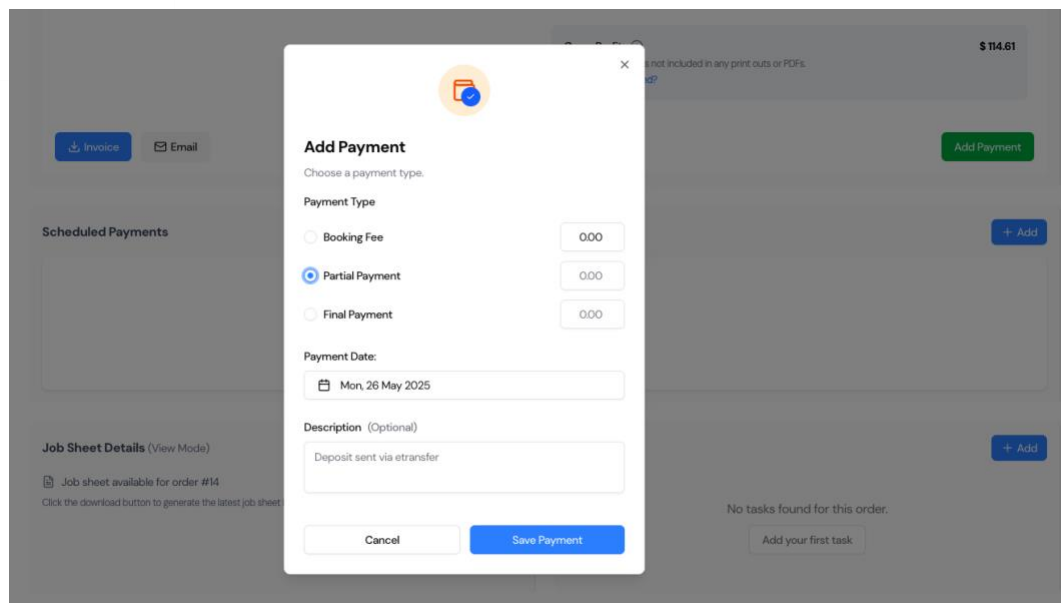
Order Log (View Mode)

Other Information (Optional)
 Internal note

From the view Orders.

You can send an email, download the invoice, or schedule payments.

Add payments:



Scheduled Payments + Add			
Type	Due Date	Value	Actions
Partial Payment	Mon, 26 May 2025 pending	\$50.00	✉ ✓ ✎ 🗑
Final Payment	Thu, 29 May 2025 pending	\$200.00	✉ ✓ ✎ 🗑

Once you click the check mark, the payment will be marked as paid.

Scheduled Payments + Add			
Type	Due Date	Value	Actions
Partial Payment	Mon, 26 May 2025 paid	\$50.00	✉ ✓ ✎ 🗑
Final Payment	Thu, 29 May 2025 pending	\$200.00	✉ ✓ ✎ 🗑

You can also send the email.

Email Invoice Customization

When emailing invoices:

1 -Template Options

- Use the default template

- Fully customize the message

2-Payment Integration

- Shows Stripe/PayPal links
- Add other payment methods

3 -Attachments

- Include additional files

4 -Send

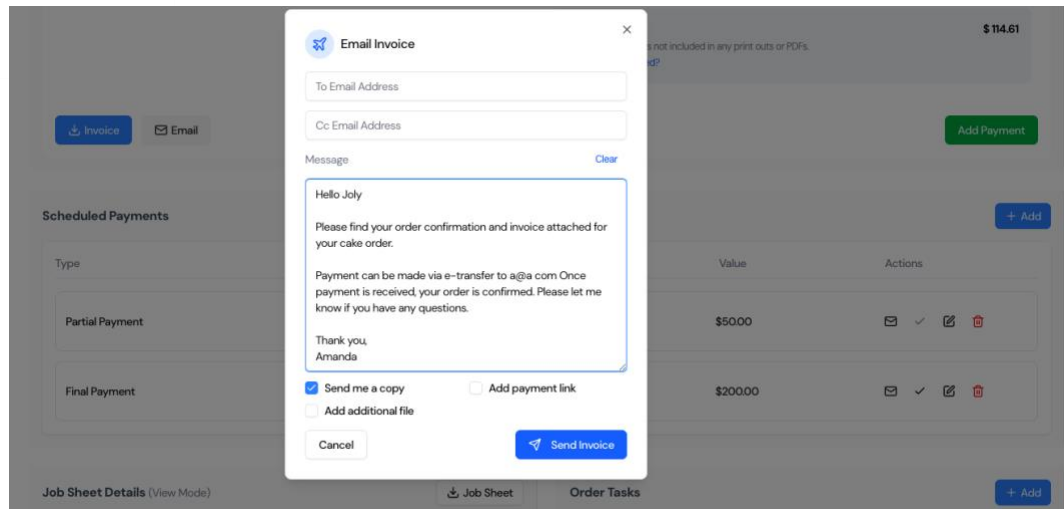
- Review & click "**Send Invoice**"

Professional, flexible invoice delivery!

Key Benefits:

- ✓ **Branded communication**
- ✓ **Payment convenience** for customers
- ✓ **Document attachment** capability
- ✓ **One-click sending**

The screenshot displays the 'Email Invoice' interface. On the left, a sidebar shows 'Invoice' and 'Order #01'. The main area contains the email composition form. At the bottom, two red boxes highlight key features: the left box contains checkboxes for 'Send me a copy' and 'Add additional file', along with a 'Choose files' button and a 'Cancel' button; the right box contains the 'Add payment link' section, which includes a 'Select payment gateway' dropdown and radio buttons for 'Stripe' and 'PayPal'.



Payment Integration:

This is still in development for Stripe and Square

Quick Order Actions

Click the **⋮ (3-dot menu)** on any order to:

- **Edit** order details
- **View** complete order information
- **Print** invoice
- **Process** refunds
- **Delete** orders

Manage all orders with just one click!

The screenshot shows the BakeBoost admin interface. On the left is a sidebar with navigation options: Dashboard, Inquiry, Orders & Inquiries, Calendar, POS, Customers, Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile, Subscription, Settings, Help & Support, and Logout. The main area is titled 'Orders' and contains a search bar, a 'Create order' button, and a table of orders. The table has columns for Products, Customer, Date, Amount, Pay Status, Order Status, Type, and Delivery. One order is listed: '01. Cake' by 'Wesly irfan.ofc@gmail.com' for \$405.00, with a 'Paid: 300' status. Below the table, it says '0 of 1 row(s) selected.' and 'Page 1 of 1'. A red box highlights the 'Actions' menu for the selected order, which includes 'Edit Order', 'View Order', 'Print Invoice', 'Refund order', and 'Delete order'. A red arrow points to the Actions menu.

The other workflow of making payments and printing out the invoice is still available

Edit Order:

In the edit functionality, you can make record payments

The screenshot shows the 'Edit Order' form in the BakeBoost admin interface. The form is divided into several sections. At the top, it says 'Add items to include into this order'. Below this is a table with columns 'Item', 'Qty', and 'Price (\$)'. The table contains one item: '01. Cake' with a quantity of 1 and a price of \$45.80. Below the table is a summary section with the following items: 'Subtotal: \$45.80', 'Discount: 0.00 \$', 'Shipping cost: 0.00', 'GST: (0%) \$0.00', and 'Total: \$45.80'. Below the summary is a 'Gross Profit' section with a value of \$25.00 and a note: 'Your profit amount is not included in any print outs or PDFs. How is this calculated?'. Below the Gross Profit section is an 'Order conversations' section with a message input field and a 'Send' button. To the right of the 'Order conversations' section is an 'Other Information (Optional)' section with an 'Internal note' field and an 'Add attribute' button. At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Proceed to Pay'.

Click on proceed to pay:

Payment Processing

When you click "**Proceed to Pay**", you'll see:

- **Cash** or **Card** payment options
- **Online payment** integrations (set in Settings)
- **Partial payments** accepted (remaining balance shown)

Flexible payment solutions for every customer!

The screenshot shows the BakeBoost admin interface. A modal titled "Select Payment Mode" is open over the "New Order" screen. The modal displays the "Total Payment" as CADs 405.00. It has two tabs: "Cash" and "Card". Under the "Cash" tab, there is a "Cash Tended" section with a text input "Enter the amount" and a dropdown arrow. Below this are two buttons: "Remaining cash (CAD)" and "Return cash (CAD)", both showing "0.00". There is also a "Remark" section with a text input "Enter details about the payment" and a "Choose File" button. At the bottom of the modal, there is an "Attachments" section with a text input "Choose file to upload" and a "Choose File" button. The modal has "Cancel" and "Save Order" buttons at the bottom. The background "New Order" screen shows a sidebar with navigation links like Dashboard, Inquiry, Orders & Inquiries, Calendar, POS, Customers, Products & Inventory, Recipe & Ingredients, E-commerce, Campaign, Reports, Social, Profile, Subscription, Settings, Help & Support, and Logout. The main content area shows "Order Overview" with fields for Customer, Type, Order No, Delivery Date / Time, Event, and Theme. There is also a section for "Order Product's Information" and "Other Information (Optional)" with a "Proceed to Pay" button.

You can also record Credit card payments, attach receipts, etc.

Invoice Preview & Actions

When printing invoices, you'll see:

- **Full order details** (customer info, payments, discounts)

- **Two options:**



Print a physical copy



Email directly to the customer

Professional invoices in one click!

Invoice
Order #14

Bake Boost
Everything App for Bakers
940 Lockhart Drive, St. Catharines

Order: #14
Date: May 26, 2025 4:37 PM

Customer Details
Jacob Liam
12892738498

Shipping Address
St. Catharines,

Item	Qty	Price	Amount
Cake	1x	CAD 140	CAD 140.00
Cupcake	1x	CAD 38	CAD 37.80
Cake Pop	1x	CAD 21	CAD 20.80
Cookie	1x	CAD 47	CAD 47.00
Cake	1x	CAD 39	CAD 39.02
Subtotal:			CAD 284.62
Total:			CAD 284.62
Paid:			CAD 0.00
Remaining:			CAD 284.62
To be paid:			CAD 284.62

Thank you for your order!
We hope you enjoy your treats!

Follow us on social media: @bakeboost

Email

Print

Refund:

If you need to make refunds for the order, you must follow the refund process.

Order Number: 16

Order Product's Information
Select products to refund

Product	Qty	Price (\$)
<input checked="" type="checkbox"/> Cake	1	46.80

Total Items : 1 Subtotal : \$ 46.80

Discount : - \$ 0

Shipping / Delivery : \$ 0

Total : \$ 46.80

Paid : \$ 0

Remaining : \$ 46.80

Refund Information

Product	Qty	Price (\$)
Cake	1 +	46.80

Total Items : 1 **Total : \$ 46.80**

Refund Mode : Cash

Reason of refund request *

Customer cancelled the order

Comment *

Payment is being refunded

Refund mode

Cash

Close Reject Confirm

Order Management Made

Use the **View Order** option to:

- ◆ **Quickly check** all order details
- ◆ **Process refunds** seamlessly
- ◆ **Make edits** if changes are needed

All essential order actions in one place!

Key Benefits:

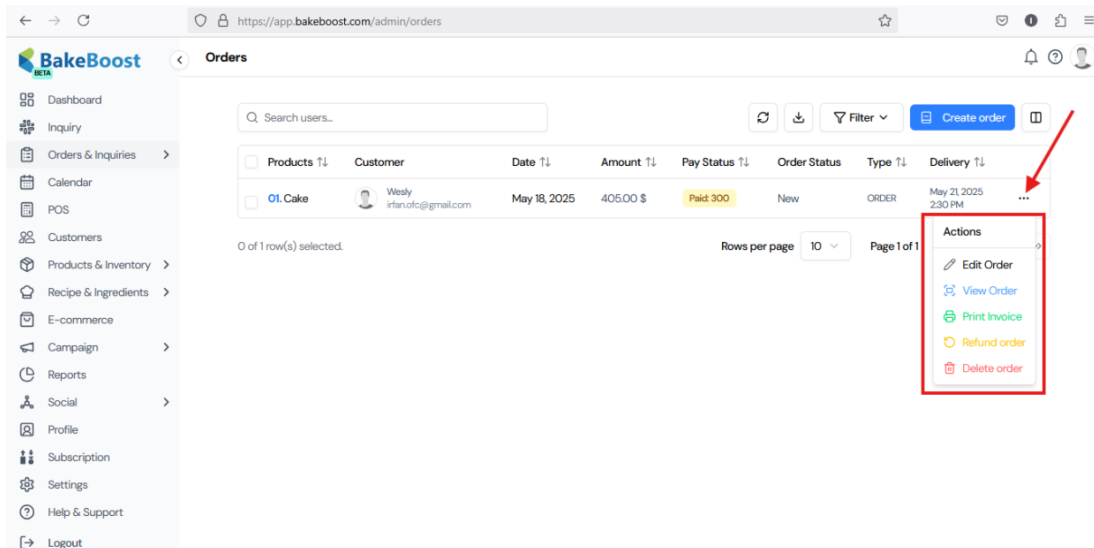
- ✓ **Instant access** to order information
- ✓ **Flexible order adjustments**
- ✓ **Streamlined workflow**

"Handle modifications and refunds without leaving the order view!"

Perfect for:

- Customer service requests
- Last-minute order changes

- Daily order management



Products

You can create different types of products:

Product Types in Bake Boost

- **Standard Product:**

This product is a single SKU with its own inventory. Used for standalone items with no variations.

- **Variant Product:**

This is a group of similar products that have different attributes like size, color, or flavor. Each variant is a unique SKU with its own inventory.

- **Recipe**

This product is based on the recipe you created in the application.

- **Composite Product:**

This product is made up of specified quantities of one or more other products. A composite product is a single SKU, but it consumes the inventory of the individual products used to make it (ingredients or bundled items).

Comparison of Product Types

The table below highlights the differences between Standard, Variant, Recipe, and Composite product types to help bakers choose the right setup for their offerings.

Understanding the types of products you can create in Bake Boost is key to efficiently managing your bakery's offerings. The table below breaks down each type in a simplified way - focusing on purpose, structure, and use cases.

Product Type	What It Is	When to Use	Key Characteristics	Example
Standard	A single product with its own inventory and pricing.	You sell a specific product without variations.	<ul style="list-style-type: none"> • One SKU • Individual inventory • Fixed price 	Classic Chocolate Cake
Variant	A product with multiple versions based on attributes.	You sell a base product in different flavors or sizes.	<ul style="list-style-type: none"> • One parent product • Multiple SKUs • Separate pricing/inventory per variant 	Vanilla Cake in Small, Medium, and Large
Recipe	A product built using ingredients (recipes) and non-edibles (supplies).	You want to calculate real production costs based on materials and time.	<ul style="list-style-type: none"> • Based on recipes & supplies • Calculated cost • Overhead included 	Wedding Cake using Vanilla Base + Board
Composite	A bundle of existing products sold as a single offering.	You sell sets or combos (e.g., party boxes, gift packs).	<ul style="list-style-type: none"> • Combines multiple products • Single SKU • Tracks inventory of components 	Rainbow Cake + Cupcakes Party Pack

The screenshot displays the 'Product Overview' and 'Product Details' sections of the Bake Boost app. The 'Product Overview' section on the left includes a 'Category' dropdown, a 'Name' text field, a 'Tag' dropdown, 'Supplier Information' with 'Supplier' and 'Supplier code' fields, 'Product options' with 'Stockable', 'Sell on e-commerce', and 'Sell on POS' checkboxes, a 'Product featured video URL' field, and an 'Image Uploads' section with a 'Choose file to upload' button and a 'Upload File' button. The 'Product Details' section on the right includes a 'Product Type' dropdown (Standard, Variant, Recipe, Composite), 'Product Information' with 'Product code' and 'Product expiry date' fields, 'Stock status' and 'Stock quantity' fields, 'Pricing' with 'Unit of measure', 'Weight/Volume', 'Supply Price (\$/kg)', 'Hours', 'Overhead Cost (\$/kg)', 'Hourly Rate (\$/CAD per hour)', 'Regular Price (\$/kg)', 'Markup', 'Discount', 'Tax Rate', and 'Total' (CAD 0.00). Below these sections is a 'Product description' field with a rich text editor and a 'Description for order and invoice' field. At the bottom, there are 'Allergens' and 'Dietary' sections with checkboxes for various allergens and dietary preferences.

Product Overview Section

- **Category:**

Select the appropriate category for the product (e.g., Cakes, Cookies, Breads). Helps organize and filter products.

- **Name:**

Enter the product name (e.g., Chocolate Fudge Cake). This name appears in your store and POS.

- **Tags:**

Select or create relevant tags (e.g., “Best Seller”, “Holiday”, “Eggless”) to make the product easier to search or filter.

- **Supplier:**

Select the supplier for the product. This is helpful for inventory and ordering management.

- **Supplier Code:**

Add the supplier's internal code or ID for the product (optional).

- **Stockable:**

Toggle this ON if this product should be tracked in inventory.

- Sell on E-commerce:

Toggle this ON if the product should appear on your online store.

- Sell on POS:

Toggle this ON to make the product available for in-store (POS) sales.

- Product/Intro Video URL:

Paste a link to a product video hosted externally (e.g., YouTube, Vimeo). Great for tutorials or product showcases.

- Image Uploads:

Click “Choose File” to upload one or more product images (JPG/PNG recommended).

Product Details Section

- Product Type:

Choose one: Standard (single product), Variant (e.g., size or flavor variants), Recipe (used in recipes), Composite (combo products).

- Product Code:

Enter a unique SKU or internal code (e.g., CHC-001).

- Product Expire Date:

Optional: Set an expiry date for perishable items.

- Stock Status:

Choose from available stock status options (e.g., In Stock, Out of Stock).

- Stock Quantity:

Set the current quantity available in inventory.

- Unit of Measure:

Choose how the product is measured (e.g., pcs, kg, dozen).

- Weight/Volume:

Optional: Enter the weight or volume (e.g., 1.2 kg).

- Supply Price :

The cost price of the item to you, for profitability calculation.

- Hours:

Enter production time required (if applicable).

- Overhead Cost :

Add any indirect cost (labor, rent) associated with the item.

- Regular Price :

The price at which you sell this product to customers.

- Markup:

Optional: Add a percentage or amount markup over cost.

- Discount:

Enter discount amount (optional). Will reflect in pricing.

- Tax Rate:

Select the applicable tax category (default: Tax).

- Total :

Automatically calculated total based on the above inputs.

Product Description Section

- Product Description:

Write a rich-text description that will appear on the product page. Use this space to highlight features, flavors, ingredients, etc.

Product description

AI Assistant: your sales with Bakeboost AI. Craft irresistible descriptions that captivate your buyers!

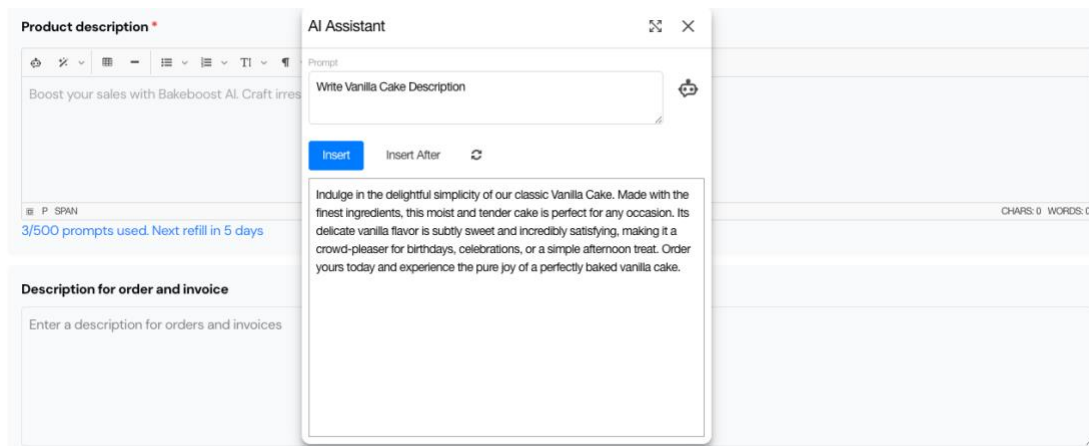
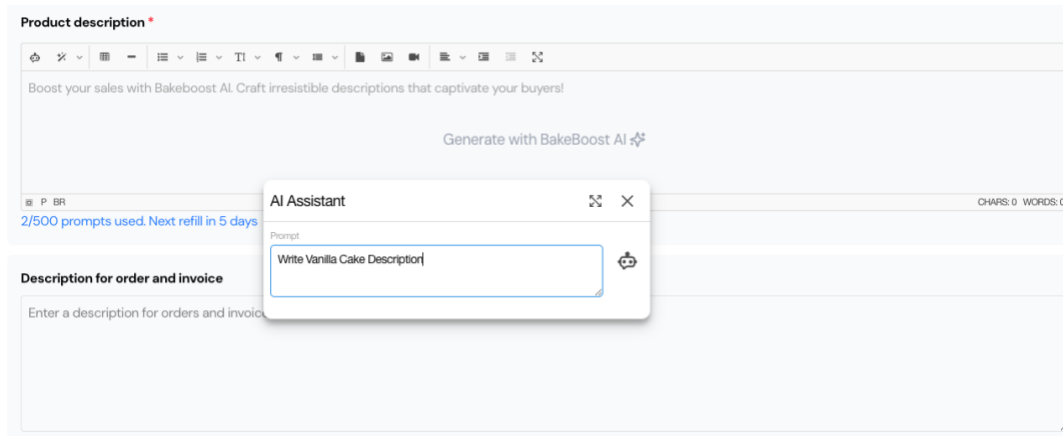
Generate with BakeBoost AI

2/500 prompts used. Next refill in 5 days

Description for order and invoice

Enter a description for orders and invoices

Use the Bake Boost AI Assistant for product description and writing that suits your brand and SEO friendliness.



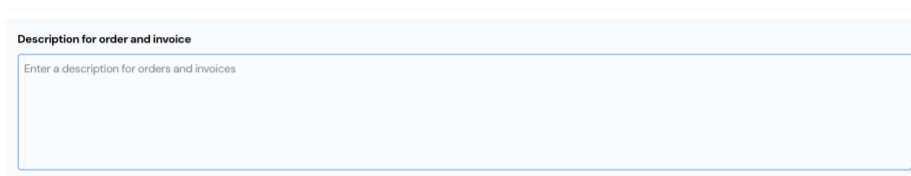
- Word Limit Indicator:

Shows prompts used out of the 500-prompt AI description assistant limit (resets every month).

Order & Invoice Description

- Description for Order and Invoice:

Very Important: An internal note or product description that appears on invoices or packing slips, a Job sheet.



Allergens Section

- Allergen Checkboxes:

Tick all that apply: Milk, Eggs, Fish, Shellfish, Tree Nuts, Peanuts, Wheat, Soybeans, Sesame. Helps inform customers and maintain compliance.

Dietary Labels Section

- Dietary Checkboxes:

Tick all that apply: Vegan, Vegetarian, Gluten Free, Dairy Free, Organic, Kosher, Keto, Paleo, Whole30, Local, Low/No Carb. This improves customer searchability and transparency.

Variant Product

A Variant Product is a group of similar products that share the same base but differ in one or more attributes, such as flavor, size, or color. Each variant has its own SKU, price, and inventory tracking.

When to Use a Variant Product

- The base product is the same (e.g., Cake)
- Variants differ by characteristics like Flavor (Vanilla, Chocolate, Red Velvet) or Size (Small, Medium, Large)
- You want to manage pricing, stock, and sales for each variant independently

How to Set Up a Variant Product

1. Select 'Variant' as Product Type

Go to the Product Details section and choose 'Variant' from the Product Type options.

2. Define the Variant Attribute

In the Product Variants section:

- Choose an attribute like Flavor or Size
- Enter possible values (e.g., Vanilla, Chocolate, Red Velvet)
- Press Enter/Tab after each value to confirm

Example: Attribute is Flavor with values: Vanilla, Chocolate, Red Velvet

Product type (U) Standard **Variant** Recipe Composite

Pricing

Unit of measure: lb - Pound, Weight/Volume: 6, Supply Price (CAD): 0.00

Hours: 1, Overhead Cost (CAD): 10

Hourly Rate: 25 CAD per hour

Regular Price (cost)*: 35.00

Markup: 50, CAD

Discount: Enter discount, \$

Tax Rate: Tax

Total: CAD 85.00

Product Variants

Variant Attribute (e.g. Size): Choose attribute, Value (e.g. Small, Medium, Large): Press Enter/Tab to separate values

3 variants will be added

Variant Name	Code	Regular price	Markup	Discount	Sales price
> Product Name / Vanilla	XXX-013	65.00	50	0.00	115
> Product Name / Chocolate	XXX-014	65.00	50	0.00	115
> Product Name / Red Velvet	XXX-015	65.00	50	0.00	115

3. Add Details for Each Variant

Each variant appears in a list with editable fields:

- Code: Unique product code (SKU) for tracking
- Regular Price: Base price before markup or discount
- Markup: Profit margin added to the base price
- Discount: Optional amount or percentage off
- Sales Price: Auto-calculated based on price, markup, and discount

Variant	Code	Regular Price	Markup	Discount	Sales Price
Product / Vanilla	XXX-013	35.00	50	0.00	85.00
Product / Chocolate	XXX-014	50.00	50	0.00	100.00
Product / Red Velvet	XXX-015	40.00	50	0.00	90.00

💡 The system calculates the final Sales Price using Regular Price + Markup – Discount.

4. Add Product Description

Write a compelling product description that applies to the whole variant group.

Example: "Indulge in the delightful simplicity of our classic Vanilla Cake. Made with the finest ingredients, this moist and tender cake is perfect for any occasion..."

5. Finalize Other Fields

- Upload an image that represents the product group
- Add stock status, weight/volume, overhead cost, and tax details
- Toggle if it should appear on e-commerce or POS

Key Benefits of Using Variants

- Easier product management for similar items
- Independent inventory tracking per variation
- Customer-friendly selection experience in your store
- More accurate profit calculations per product

Recipe Product

A Recipe Product consists of multiple ingredients (recipes) and materials (supplies) used to produce a finished product. This allows bakers to accurately track the cost of production based on real input quantities and calculate markup-based sales pricing.

When to Use Recipe Product

- You produce the item using other base recipes or ingredients
- You want to track the cost of goods based on ingredients and supply usage
- You need to manage the usage of packaging, boards, or materials along with edible items

The screenshot displays the 'Product Overview' and 'Product Details' sections of the Bake Boost app. The 'Product Overview' section includes fields for Category (Cakes), Name (Enter Product Name), Tags (Select...), Supplier Information (Supplier, Supplier code), Product options (Stockable, Sell on E-commerce, Sell on POS), Product video URL, and Image Uploads. The 'Product Details' section shows the Product Type set to 'Recipe', with tabs for Standard, Variant, Recipe, and Composite. It lists Recipes (7 vanilla, 1 unit, \$2.00) and Supplies (Board, 1 unit, \$2.00; Edible Paper A4, 1 unit, \$10.00). The Pricing section includes Unit of measure (lb - Pound), Weight/Volume (6), Supply Price (\$40), Hours (1), Overhead Cost (\$40), Hourly Rate (25 CAD per hour), Calculated Price (cost)* (4800), Markup (50), Discount (Enter discount), Tax Rate (Select...), and a Total of CAD 99.00. A Product description field at the bottom contains a sample text about a classic Vanilla Cake.

How to Set Up a Recipe Product

1. Select 'Recipe' as Product Type

In the Product Details section, select 'Recipe' from the Product Type options.

2. Add Recipes and Supplies

Use the provided fields to add:

- Recipes: pre-defined preparations like batter, frosting, fillings (e.g., Vanilla base)
 - Supplies: packaging, cake boards, edible prints, or any non-edible item used
- Specify the quantity of each item used per unit of the product.

3. Add Pricing Inputs

Set values for:

- Unit of Measure (e.g., lb - Pound)
- Weight/Volume (e.g., 6 lb)
- Hours (production time)
- Overhead Cost (rent, electricity, etc.)

The system calculates the Calculated Price (cost) by adding up all recipe, supply, and overhead costs.

4. Add Markup and Tax

Enter your desired markup percentage or value. You can also add any applicable discounts and set the tax rate.

Example: Cost is CAD 49.00 + 50% Markup → Final Total = CAD 99.00

5. Add Product Description and Image

Add a clear product description and upload an image representing the finished recipe-based product.

Benefits of Recipe Product Setup

- Accurate cost tracking based on real usage
- Centralized management of recipes and materials
- Supports both edible and non-edible components
- Enables smart pricing with automated calculations

Composite Product

A Composite Product is a bundle or combination of multiple products sold together as a single item. Each component within the composite product retains its own inventory tracking. The composite has its own SKU and is priced as a unified product.

When to Use Composite Product

- You want to sell a bundle of multiple products (e.g., cake + cupcakes) as one offering
- You want to track inventory for each item used in the bundle
- You need to calculate the total cost based on the sum of the component product costs

How to Set Up a Composite Product

1. Select 'Composite' as Product Type

In the Product Details section, select 'Composite' from the Product Type options.

2. Select Component Products

Use the search bar under 'Select products to include into the composite product' to add existing products that will be part of the bundle. Each item shows its price, and you can remove items anytime.

3. Add Overhead and Pricing

- Enter the number of hours for preparation
- Add any fixed overhead costs (e.g., packaging)
- The system calculates the Calculated Price (cost) from the total cost of individual

products + overhead

- Add desired Markup, Discount, and Tax Rate to determine the final total price

Example:

- Rainbow Cake = CAD 50.00
- Moist Chocolate Cupcakes = CAD 15.00
- Overhead = CAD 10.00
- Total Cost = CAD 65.00
- Markup 50% → Final Sale Price = CAD 115.00

The screenshot displays the 'Product Overview' and 'Product Details' sections of the Bake Boost app. The 'Product Overview' section includes fields for Category (Cakes), Name (Enter Product Name), Tag (Select...), Supplier Information (Supplier, Supplier code), Product options (Stockable, Sell on E-commerce, Sell on POS), Product video URL, and Image Uploads. The 'Product Details' section shows the 'Product Type' (Standard, Variant, Recipe, Composite) and a list of products to include in the composite product: Rainbow Cake (50.00 CAD) and Moist Chocolate Cupcakes (15.00 CAD), with a Total of 65.00 CAD. The Pricing section shows Hours (1.25 pH), Overhead Amount (\$10), Calculated Price (65.00), Markup (50), Discount (Enter discount), Tax Rate (Select...), and a final Total of CAD 115.00. Below these sections is a 'Product description' field with a rich text editor and a 'Description for order and invoice' field.

4. Finalize Description and Images

Enter a descriptive summary for the composite product. Upload images that best represent the full bundle offering.

Benefits of Composite Product Setup

- Ideal for bundling cakes, cupcakes, or treats
- Inventory for each component is automatically adjusted
- Streamlined product creation for special offers, gift boxes, or events
- Transparent pricing and margin calculation

All-in-One E-Commerce Domain Setup:

This feature enables everyone to have their store set up on the bake boost without going through external e-commerce platforms

Commerce Feature gives you an option to set up your store on the backend

You can have two things:

1. Dedicated your cake shop's online store
2. Custom Inquiry form

Why set up your domain here?

If you don't have an existing website or domain, BakeBoost lets you:

- ✓ **Create & activate** a custom domain instantly (e.g., *YourBakery.com*)
- ✓ **Skip technical hassles**—no need for separate hosting
- ✓ **Launch faster** with built-in SSL security

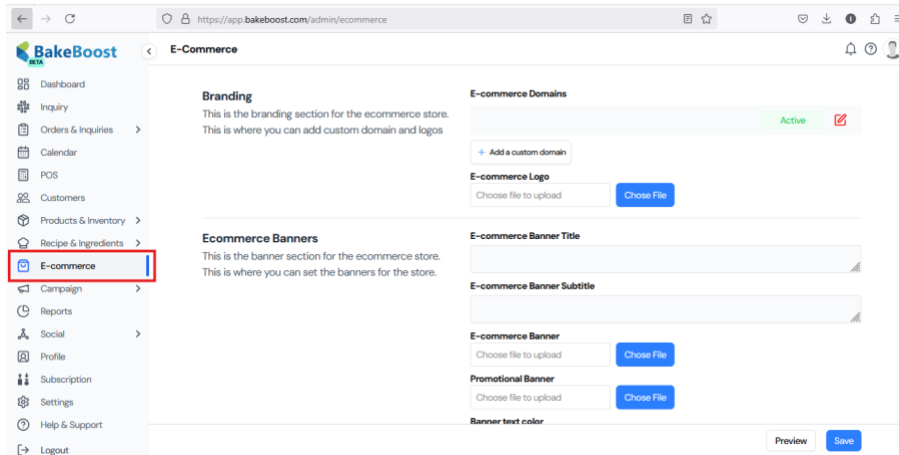
Perfect for bakers who want:

- A **professional online store**
- **Zero coding** requirements
- **Seamless integration** with orders/inventory

We plan to offer you the option to buy a domain from Bake Boost in the future. This feature is currently on the roadmap.

Currently, you will need to have your domain name available, which can be purchased from any domain provider.

"Your bakery's digital home, ready in minutes!" 🏠🍰



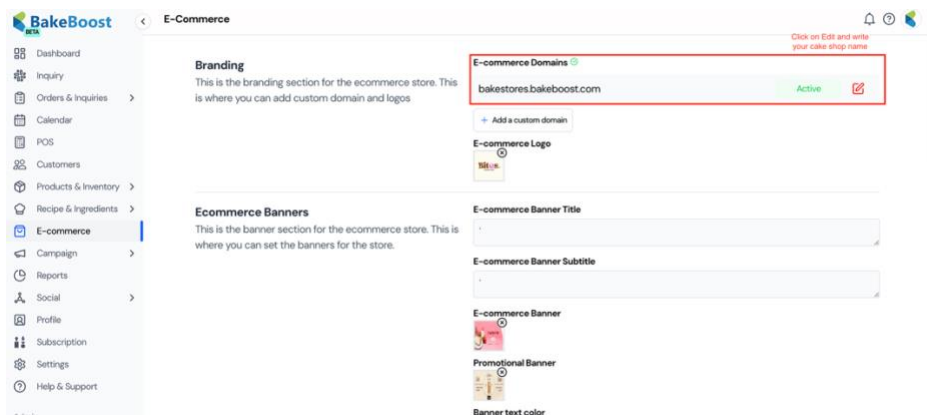
Click on the edit

Enter the name of your cake shop, and this will become your commerce page on the Bake Boost application. If you have your domain, you can configure it; otherwise, you can continue using the dedicated page on the Bake Boost application.

In the example below. You will be able to access your cake shop page.

<https://bakestores.bakeboost.com>

You can choose your logo and other settings as per your brand



Professional Storefront

- Your logo & banners are displayed
- Clean, mobile-friendly layout

Seamless Navigation

- Product categories visible
- Integrated search & filters

Customer-Friendly Features

- Secure checkout (Stripe/PayPal)
- Clear shipping/return policies

Example View:

📌 **Header:** Your bakery name + logo

📌 **Banner:** Promotional offers

📌 **Categories:** Cakes, Cookies, etc.

📌 **Footer:** Contact + About links

Payment Gateways

- Connect **PayPal** & **Stripe** for secure payments
- Supports multiple payment methods

Product Categories

- **Add/Manage** categories (e.g., Cakes, Cookies)
- **Upload icons** for visual appeal

Shipping Zones

- Set **zones** by country/region
- Configure **rates** (flat, weight-based, etc.)
- *No zones added yet* (start by clicking "+")

About Page

- Customize **store story/history**
- **Preview** before publishing

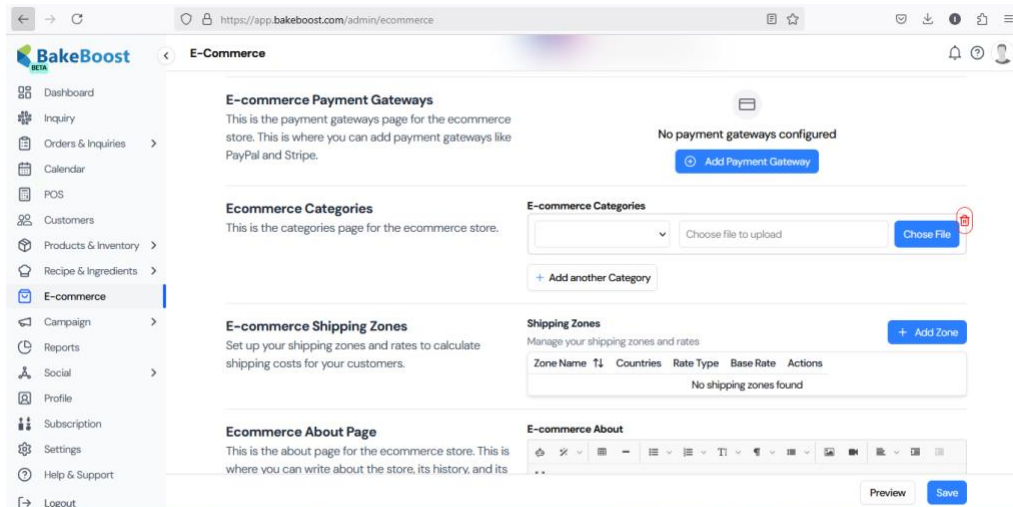
Quick Actions:

✓ **Save** after each section

✓ **Upload** category images

✓ **Test** payment gateways

"Launch your bakery's online store effortlessly!"

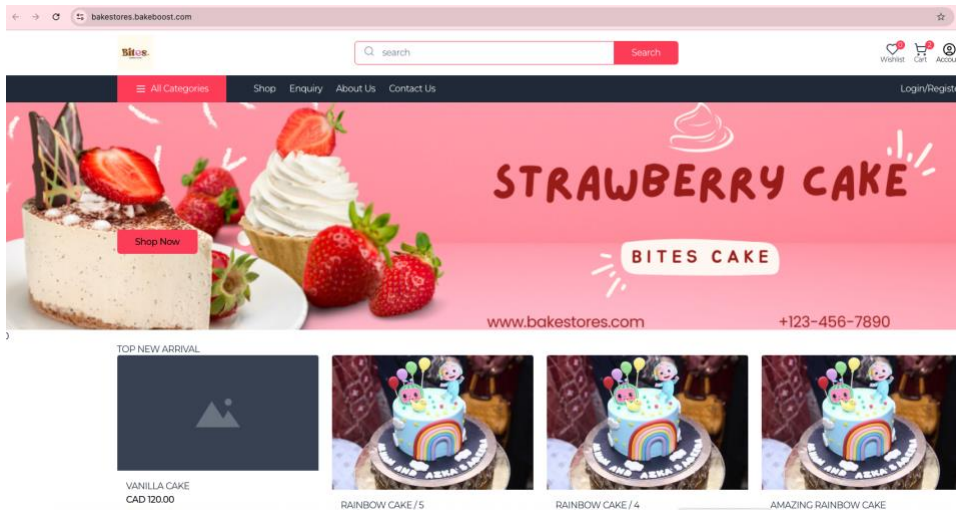


Now you can access your online store based on the name you have provided above while editing it

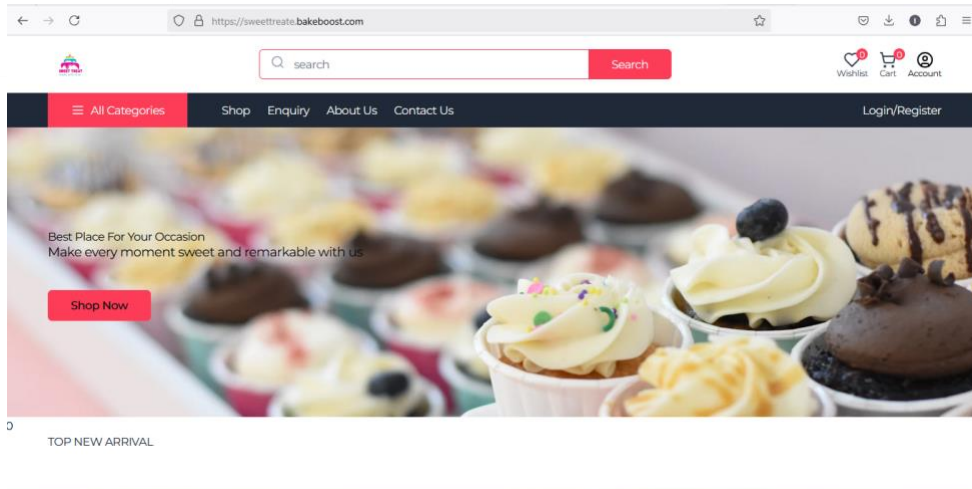
<cakeshopname>.bakeboost.com

Below example is

Bakestores.bakeboost.com



This example is stweetreat.bakeboost.com



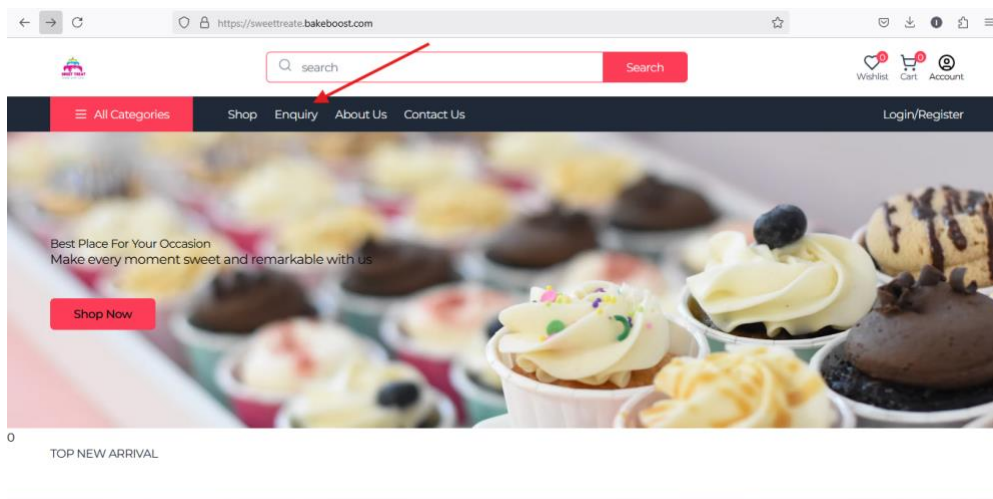
Custom Inquiry Form:

In the Menu, you can see that you also have an Enquiry form

Your tailored inquiry form is now active with:

- ✓ **Flexible fields** for customer requests
- ✓ **Seamless integration** with your workflow
- ✓ **Auto-saved data** for future follow-ups

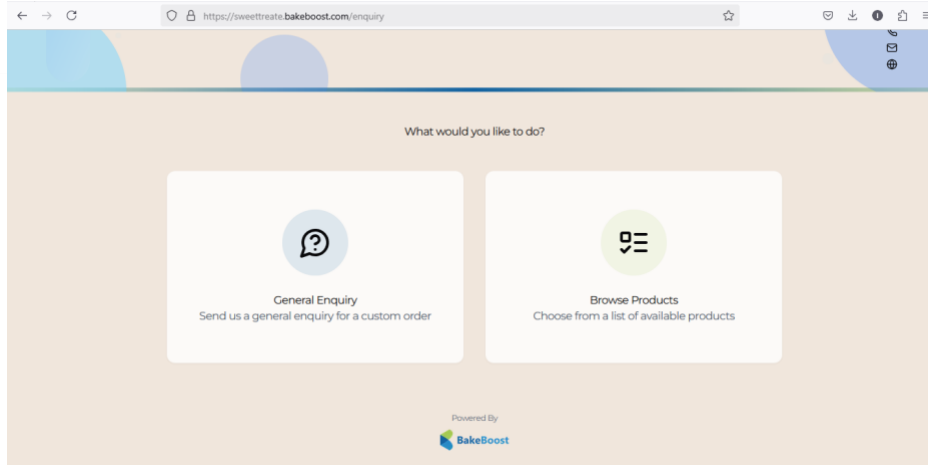
Start capturing leads effortlessly!



Or you can access directly

<yourcakeshop name>.bakeboost.com/enquiry

Sweettreat.bakeboost.com/enquiry



Custom Inquiry Form Overview

Your optimized inquiry form includes:

- ✓ All essential fields for complete customer requests
- ✓ Smart layout for easy data entry
- ✓ Responsive design (works on all devices)

Capture every detail while providing a smooth customer experience!

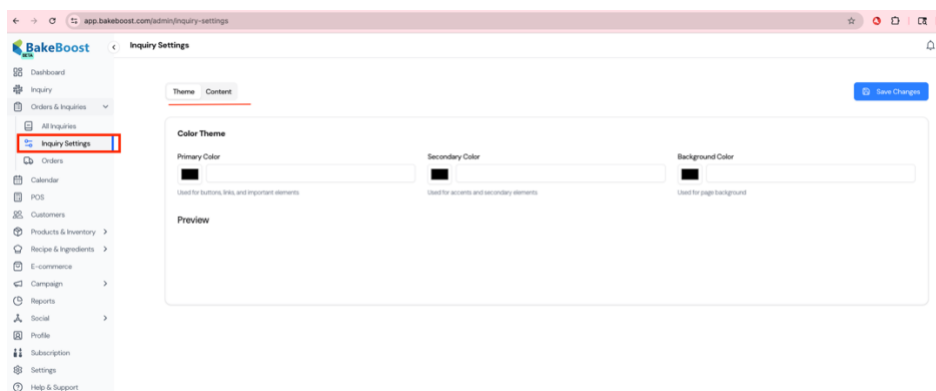
Key Features:

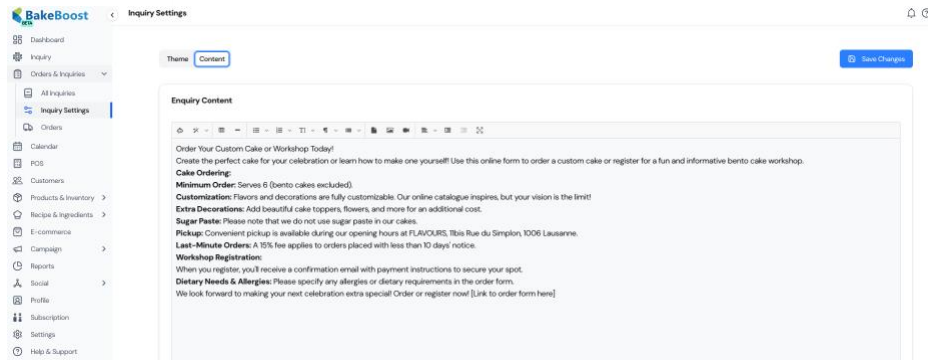
- Required fields are marked clearly
- Logical flow from contact to order specifics

"Turn inquiries into orders faster than ever!"

Settings of Enquiry form:

You can color the theme as per your color scheme, and update the content from the Inquiry settings





The Enquiry form:

← Enquiry Details

Hello! Please use this form to place your order or register for a bento cake workshop. I'll contact you shortly after your submission to confirm the details. **CAKES:** - Minimum order: serves 6 people (except for bento cakes) - Flavours and decorations are fully customizable — the catalogue is just a guide - Decorations (cake toppers, flowers, etc.) are available for an additional cost - Please note: I do not work with sugar paste - Pick-up available during opening hours at: FLAVOURS, Rue du Simplon 1006 Lausanne - A 15% fee applies to last-minute orders (less than 10 days' notice) **WORKSHOPS:** - You will receive a confirmation and payment instructions to finalize your reservation if you have any allergies or dietary needs, please note them in the box below. I look forward to baking for you! Thanks

Contact Details

First Name *

First Name

Last Name *

Last Name

Email Address *

Email Address

Contact Number *

Contact Number

Selected Products

Product selector component would go here

No products selected

Additional Information

Allergies

TESTING

Message

TESTIN

Please add me to your mailing list

Important Notice!

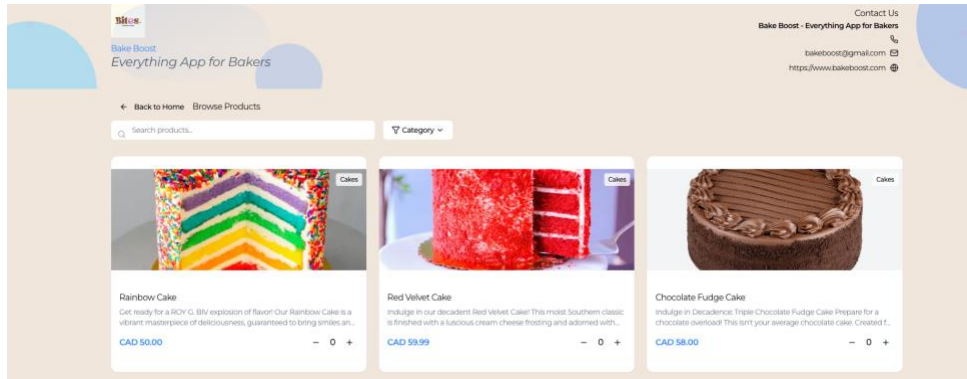
Submitting this form does not book your order. I will reply as soon as possible to let you know if I have availability for your requested date. For the workshops, you will receive an email with the payment information to confirm your spot.

Cancel

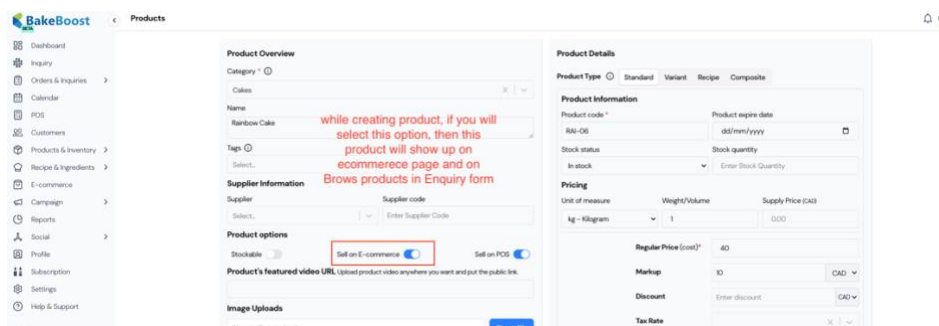
Submit Inquiry

Powered By
BakeBoost

Browse products:



To show products on e-commerce and the Enquiry form. While creating the Product, you will select the checkmark.



When a customer submits your custom inquiry form:

1-Instant Organization

- All inquiries automatically appear in your Inquiry Dashboard
- Complete details displayed (contact info, request specifics, timestamps)

2- Click Actions (: Menu)

- View full inquiry details
- Edit if updates are needed
- Delete outdated/spam inquiries

3-Workflow Integration

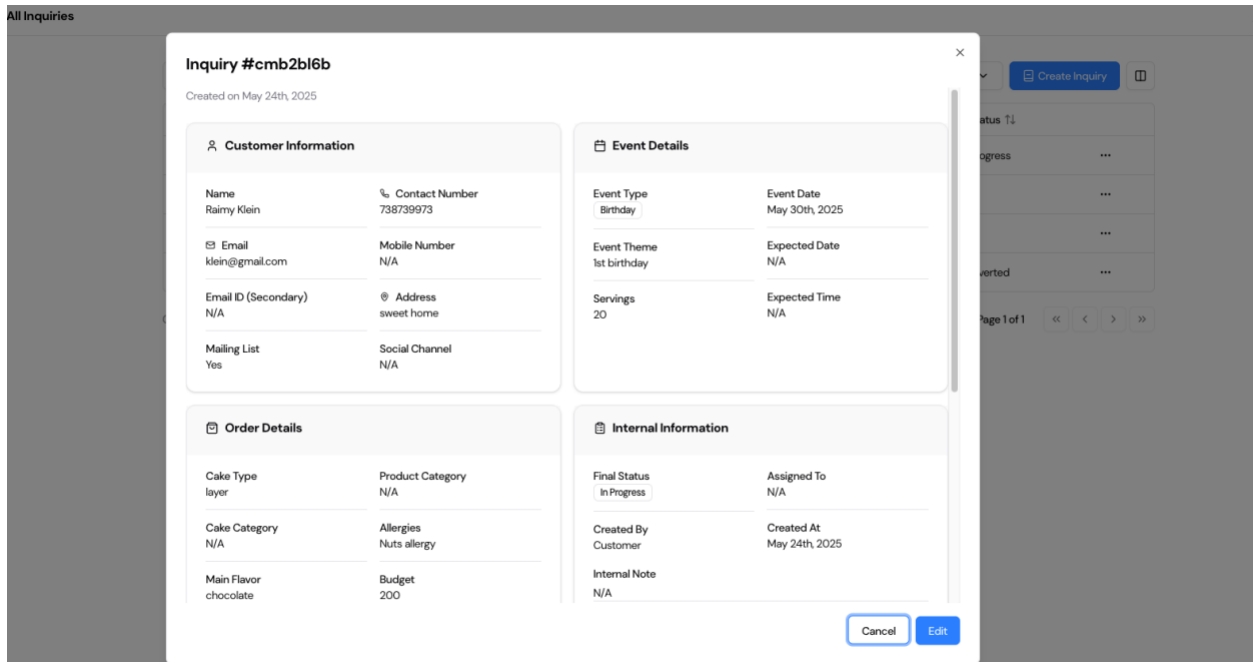
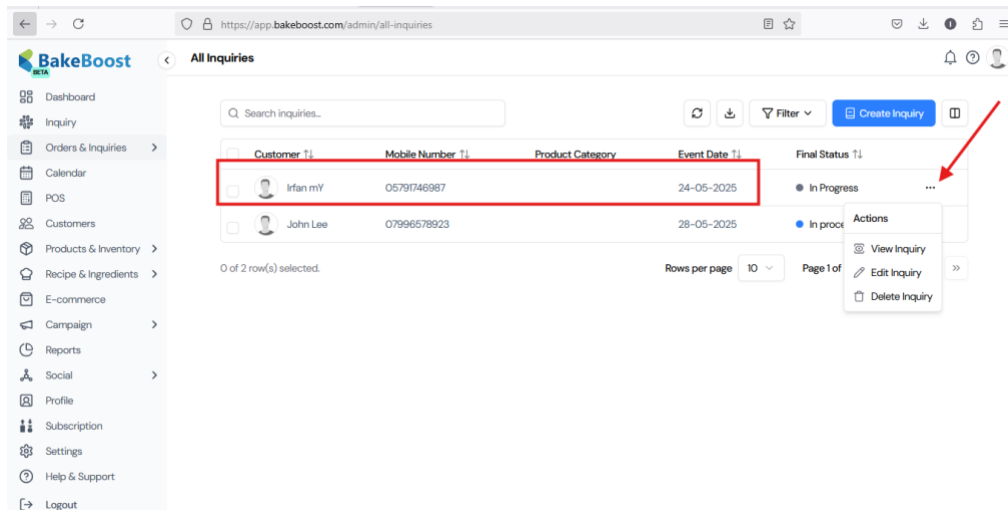
- Seamlessly convert inquiries to orders
- Track follow-up status (Pending/Processed)

Example Inquiry View:

◆ Customer: irfanmy

- ◆ Request: "birthday cake, fondant, delivery June 15"
- ◆ Status: in process (dark badge)

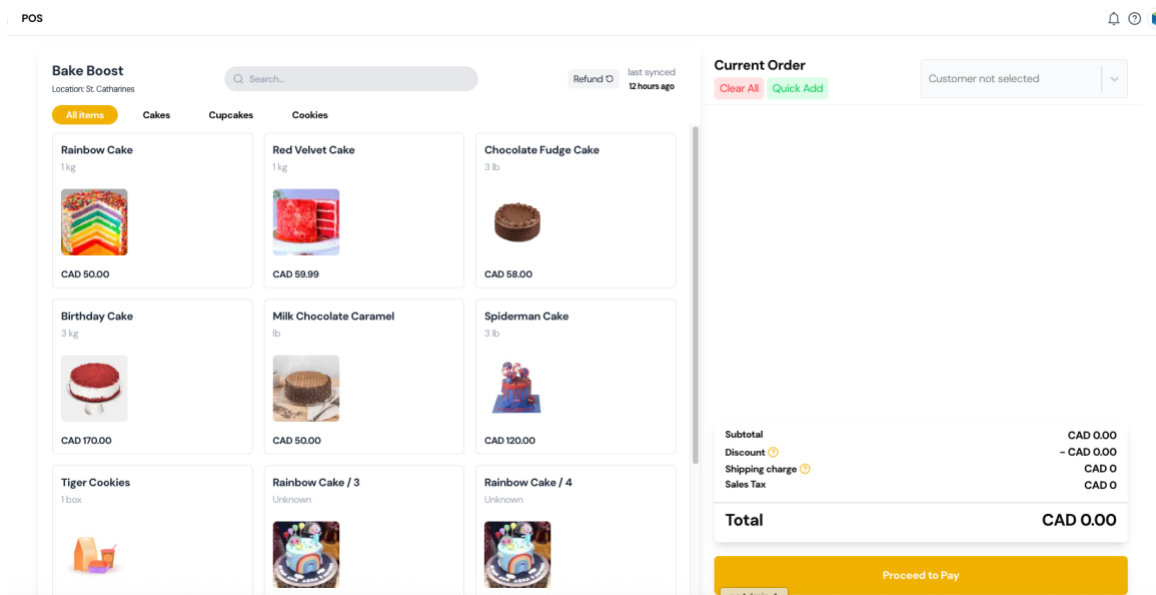
"Your bakery's inquiry-to-order pipeline – now perfectly streamlined!"



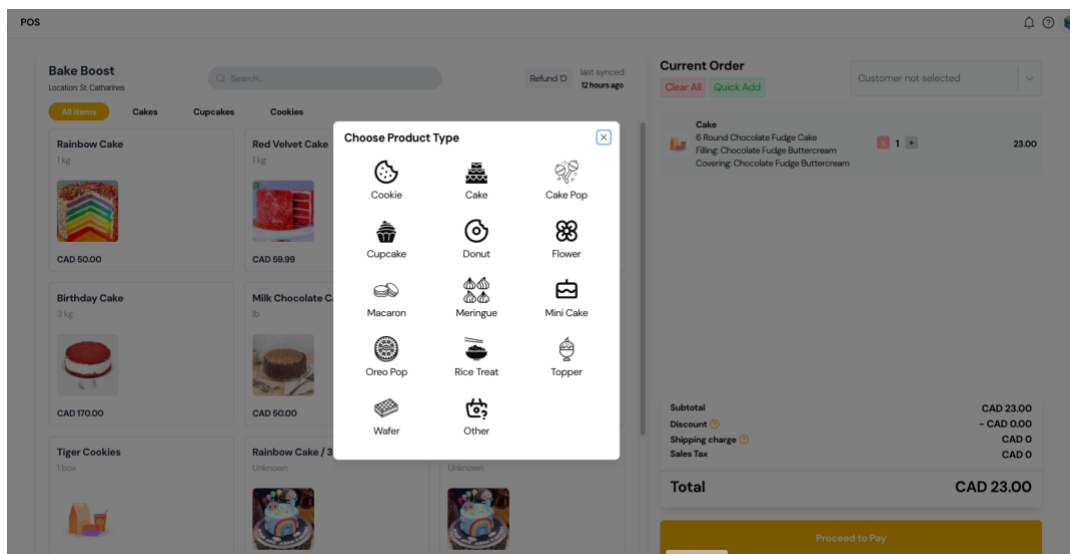
Point of Sale (POS)

This point-of-sale (POS) system is specifically tailored for bakers managing outlets or shops. It provides a convenient, in-store solution to optimize operations, from handling customer inquiries to processing orders efficiently.

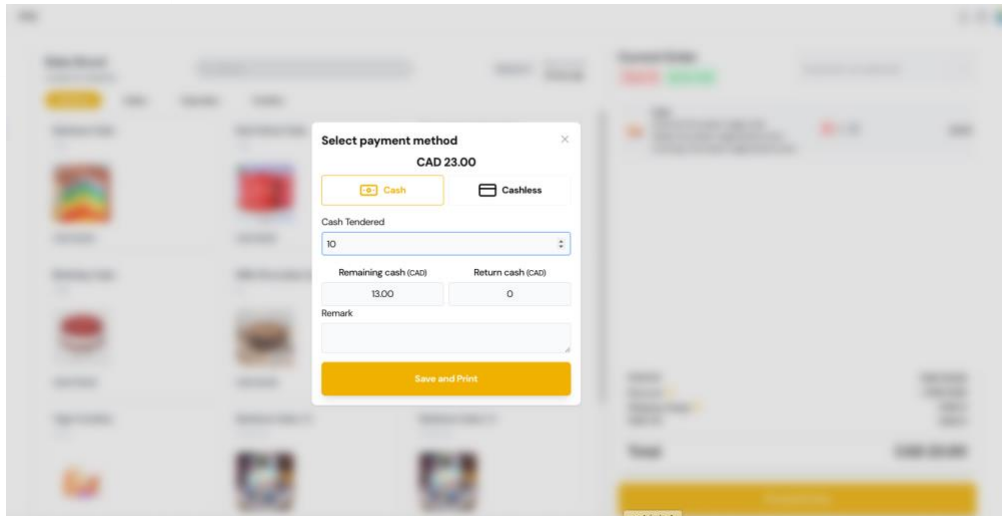
By integrating workflow automation with point-of-sale functionalities, bakers can ensure smooth transactions, better inventory management, and faster service, all vital for running a thriving bakery business.



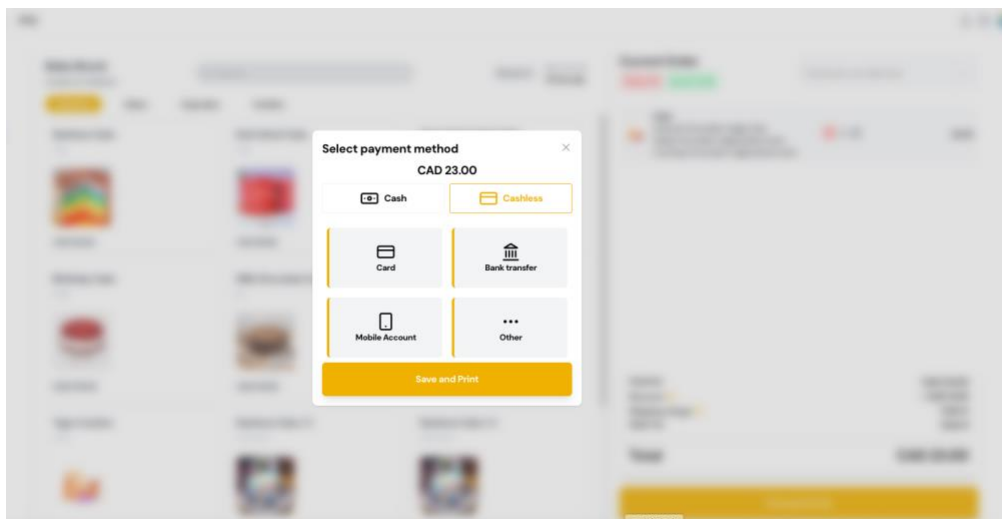
You can also add Quick add on the point of sale:



You can also select a customer if you know the customer is coming to the outlet to shop



You can record the mode of payment from different sources:



The image displays four screenshots of the 'Select payment method' screen in the Bake Boost app, arranged in a 2x2 grid. Each screen shows a transaction for CAD 23.00 with a 'Go back' link and two selection buttons: 'Cash' (with a coin icon) and 'Cashless' (with a card icon). The 'Cash' button is highlighted in yellow in all screenshots.

- Top-left screenshot:** The 'Name of bank' field is active. Below it are fields for 'Card Number' (displaying '0000 0000 0000'), 'Paid amount' (displaying '10'), and two summary boxes: 'Remaining (CAD)' (13.00) and 'Return (CAD)' (0). A 'Remark' field is at the bottom, followed by a yellow 'Save and Print' button.
- Top-right screenshot:** The 'Ref Number' field is active. It contains the same 'Card Number', 'Paid amount', and summary boxes as the first screenshot. The 'Remark' field is empty.
- Bottom-left screenshot:** The 'Name' field is active. It contains the same 'Card Number', 'Paid amount', and summary boxes. The 'Remark' field is empty.
- Bottom-right screenshot:** The 'Attributes' section is active, showing a '+ Add attribute' button. It contains the same 'Paid amount' and summary boxes. The 'Remark' field is empty.

You can save and print by defining different printers from the settings page, allowing you to select specific printers used at outlets or shops.

Invoice

Bake Boost
 Everything App for Bakers
 940 Lockhart Drive, St. Catharines
 Order: #17 Tel: +1 (555) 123-4567
 May 28, 2025 9:34 PM

ITEMS
Cake
 6 Round Chocolate Fudge Cake
 Filling: Chocolate Fudge Buttercream
 Covering: Chocolate Fudge Buttercream

1x	23	23.00
----	----	-------

Subtotal: CAD 23.00
Total: **CAD 23.00**
 Paid: CAD 10.00
Remaining: **CAD 13.00**
To be paid: **CAD 13.00**
Pay Mode: **Cash**

Thank you for your order!
 bakestores.bakeboost.com
 17057154670

Close

Print

Campaign / Marketing:

Using the Campaign Management Feature

The Campaign Management feature allows bakers to easily create, manage, and promote special campaigns (e.g., for holidays, events, or new product launches) to attract customers and boost sales.

It gives you an option to send an emails to your customers/contacts

Example in this guide: Mother's Day Campaign

1. Access Campaign Management

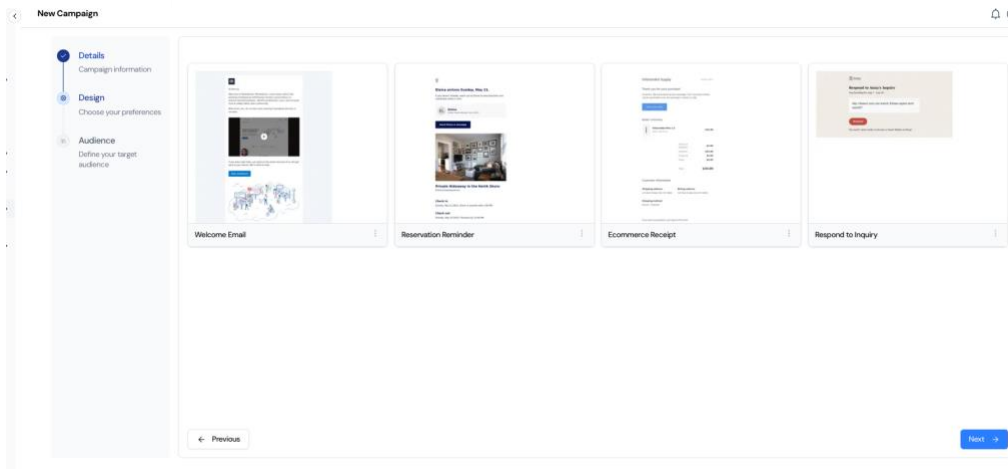
Open the Bake Boost app. Navigate to the Campaigns tab from the bottom menu.

2. Create a New Campaign

'Create New Campaign'.

3. Choose a Template

Select a ready-made template (e.g., 'Mother's Day Special'). Templates include attractive designs and suggested text.

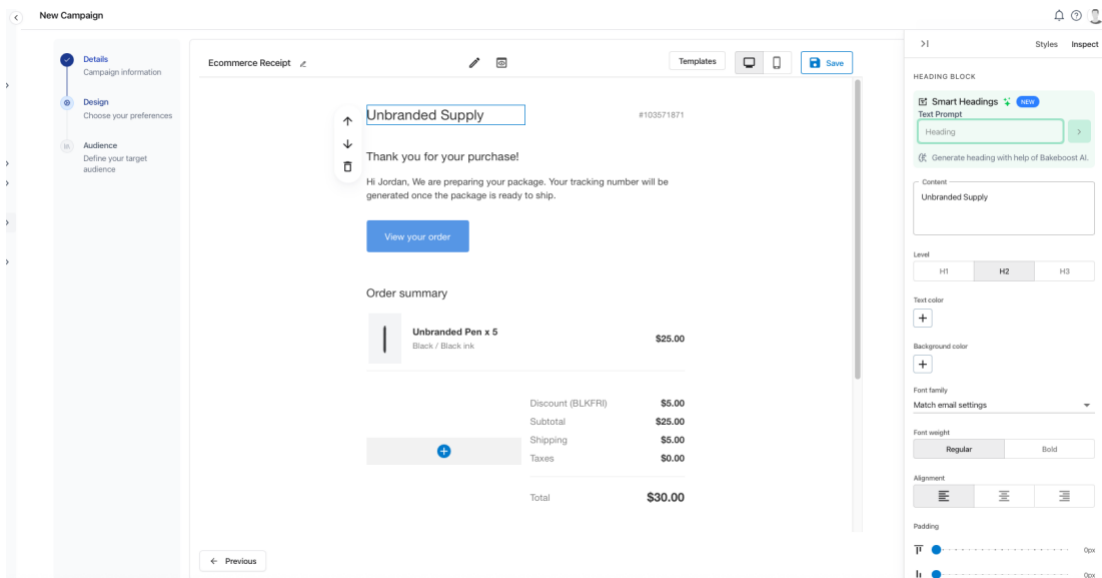


4. Customize Campaign Content

Edit campaign content:

- Headline
- Description
- Promo Code (optional)
- Campaign Image

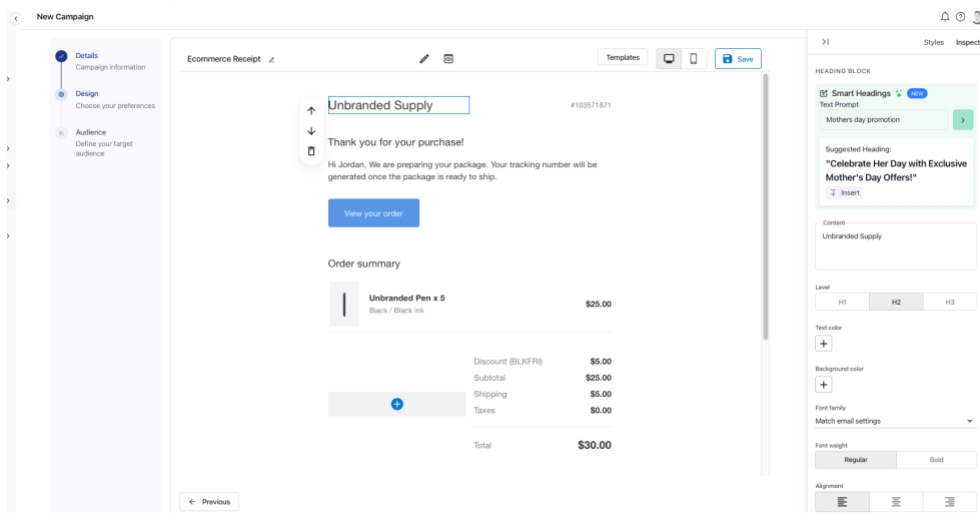
The writing can utilize Bake Boost **AI features** to create content based on the prompt.



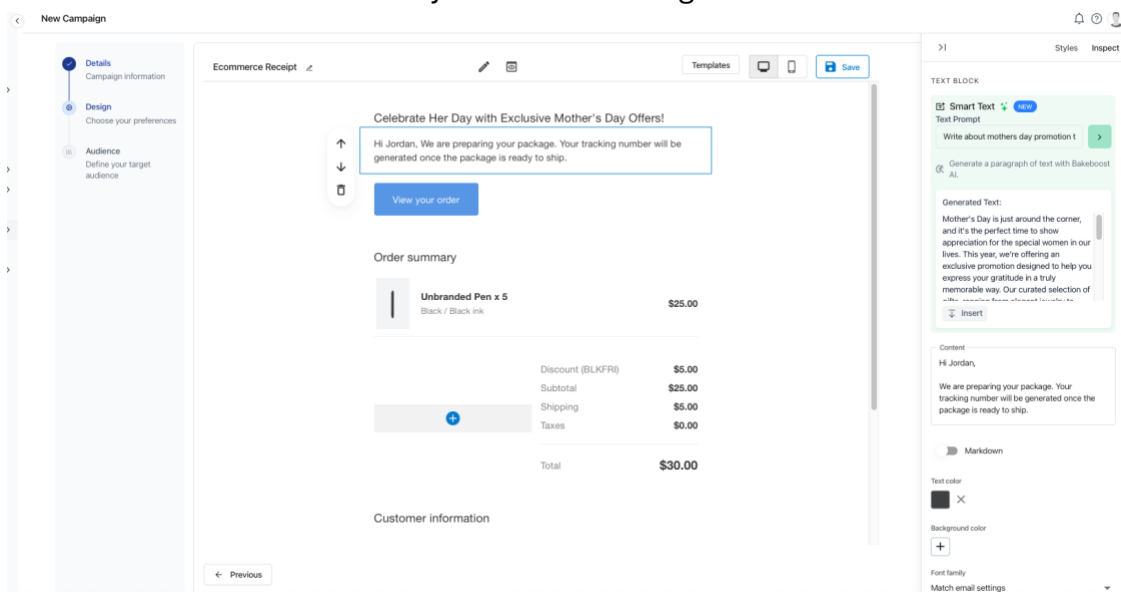
Example Prompt:

“Mother’s Day Promotion”

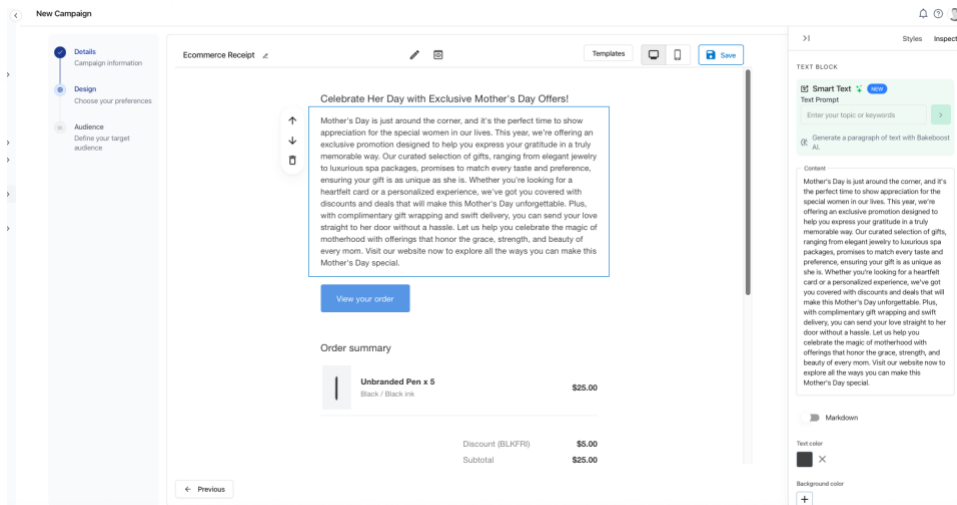
The AI responded with the suggested heading: **"Celebrate Her Day with Exclusive Mother's Day Offers!"**



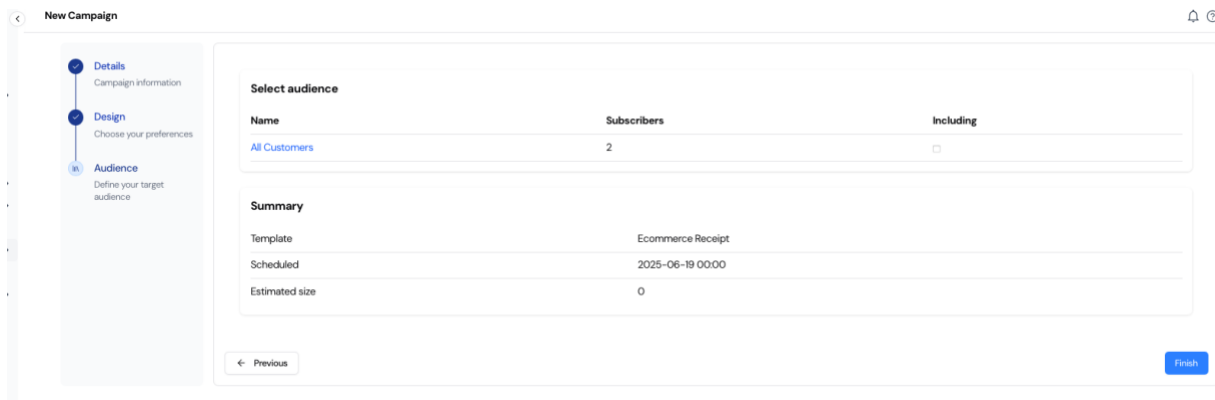
You can now also write the body of the email using the AI.



Example:



Preview your campaign before publishing. Make sure the design and text look great!



5. Publish the Campaign

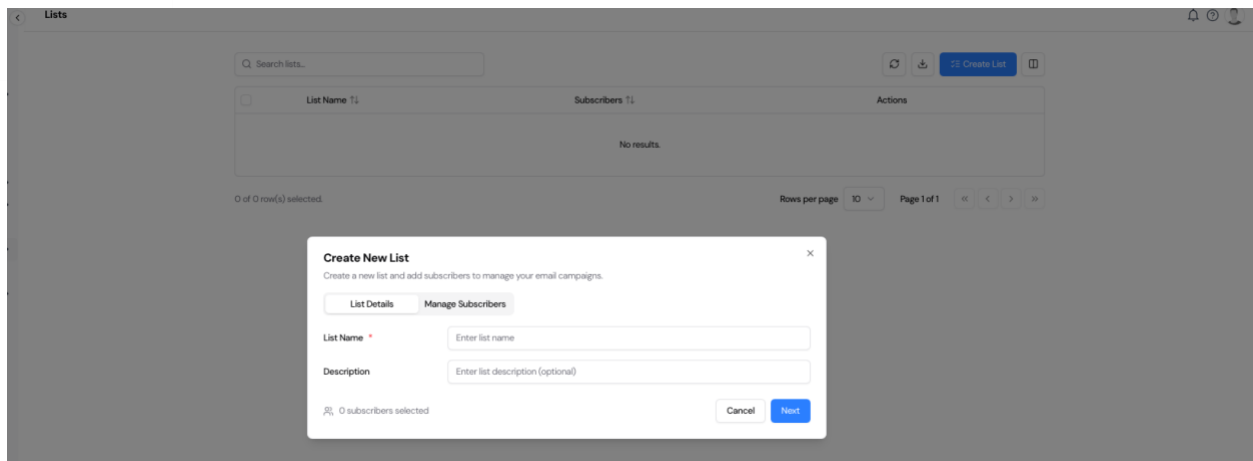
Once you 'Publish,' your campaign/email will be scheduled according to the schedule.

Summary

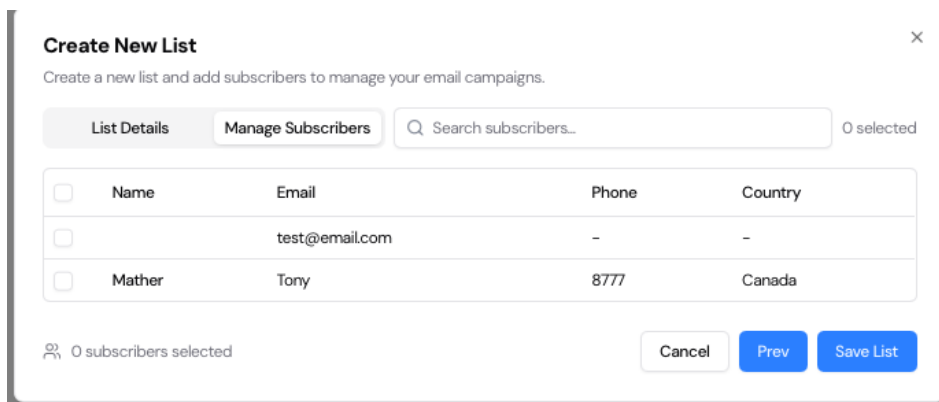
- ✓ Simple setup with templates
- ✓ Attractive campaigns for special occasions
- ✓ Performance tracking
- ✓ Helps bakers boost sales & customer engagement

Lists:

To maximize the effectiveness of your email campaigns, you can segment your subscriber list based on demographics, interests, purchasing behavior, or engagement level. This allows for targeted messaging that resonates with different groups, whether promoting seasonal offers, new product launches, or exclusive benefits.



Manage existing subscribers to assign them to the list:



Subscriber:

Subscribers are the cornerstone of your email campaigns. Every customer contact has the potential to become a subscriber, creating a seamless bridge between your business and your audience.

You can easily import and integrate new emails or contacts into your subscriber list, ensuring every interaction is an opportunity to grow your reach.

Whether adding contacts manually or uploading a batch of emails, the process is designed for simplicity and efficiency. With a robust subscriber base, your targeted messaging can resonate powerfully across demographics, interests, and behaviors, driving engagement and boosting sales.

Subscribers

Q Search subscribers...

Filter Add Subscriber

<input type="checkbox"/>	Name T1	Email T1	Phone T1	Country	List
<input type="checkbox"/>		test@email.com		-	All Customers
<input type="checkbox"/>	Mather	Tony	8777	Canada	All Customers

0 of 2 row(s) selected

Rows per page 10 Page 1 of 1

Addition of contacts as subscriber:

Add New Subscriber

Add a new subscriber to your mailing list

Import from CSV/XLSX

Name *

Email *

Phone

Country

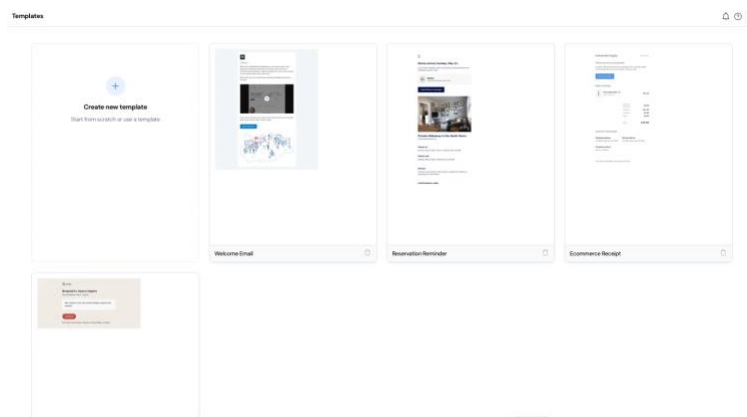
List *

Cancel Save

Templates:

You can also customize templates to align with your brand identity, incorporating your logo, color scheme, and typography to create a cohesive look.

This ensures that every campaign reflects your unique style and helps reinforce brand recognition among your audience.



Still work in progress for the remaining features to be added in this guide: