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

Table of Contents

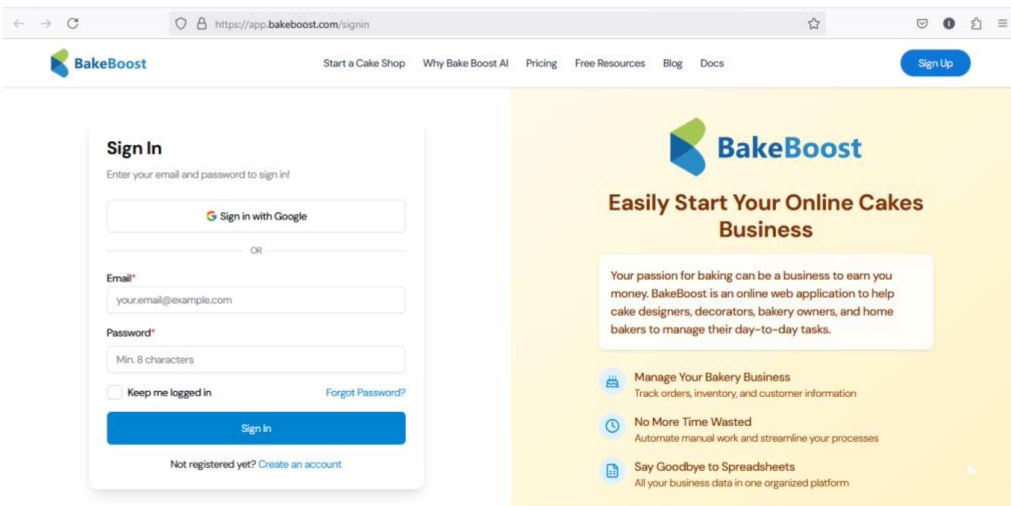
How to Sign Up, Login

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

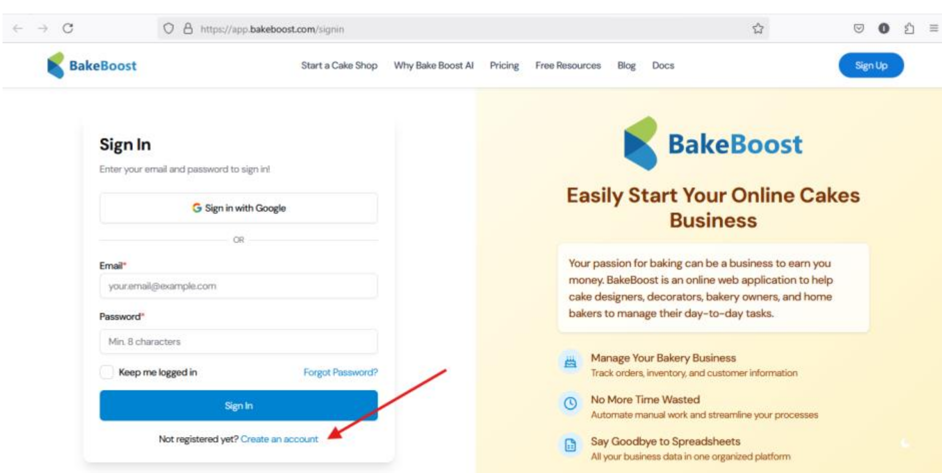
Two ways to register with Bake Boost:

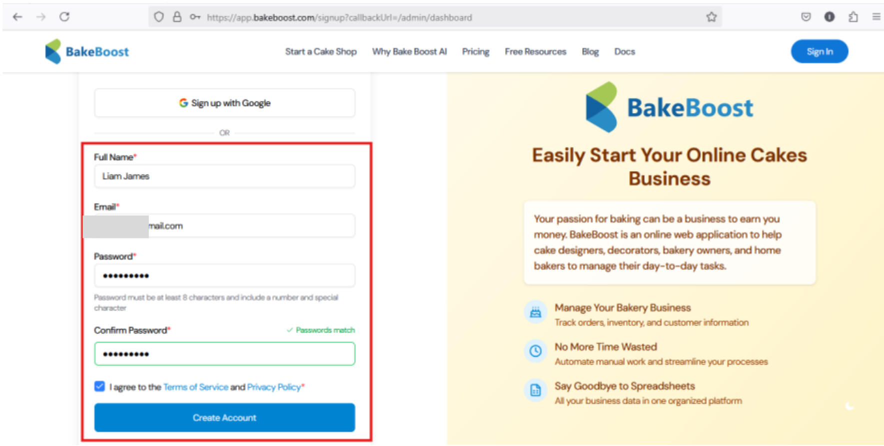
1. **Sign up with your Google account if you have one**
2. **Or sign up with your email ID**

Already registered? Log in here.

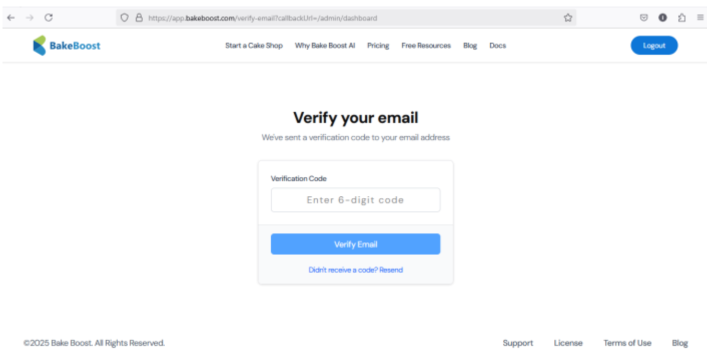


If you are a new user, you can create a new account from here:

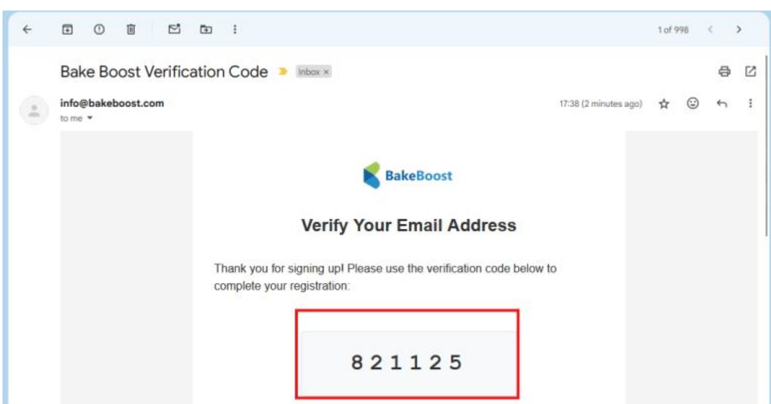


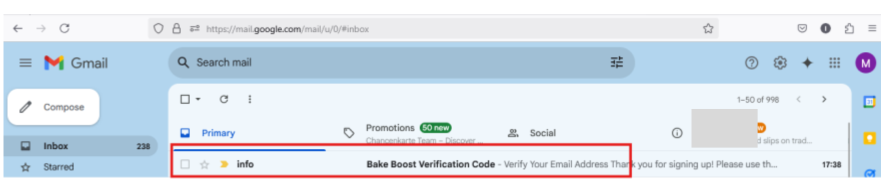


You will receive a 6-digit code to verify your account.

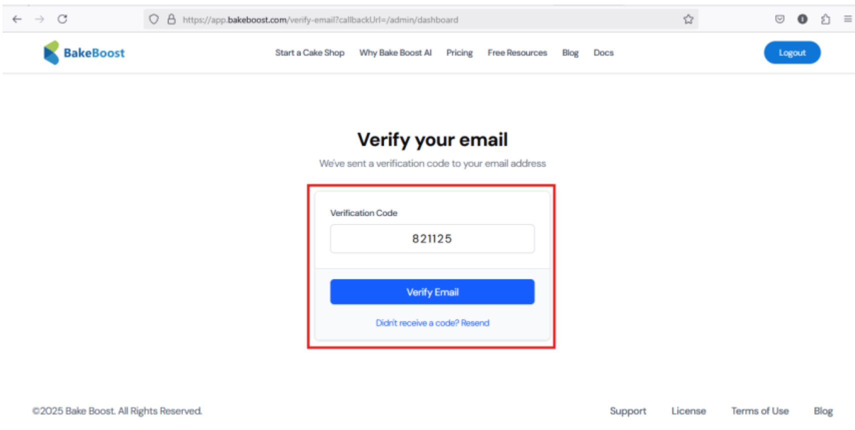


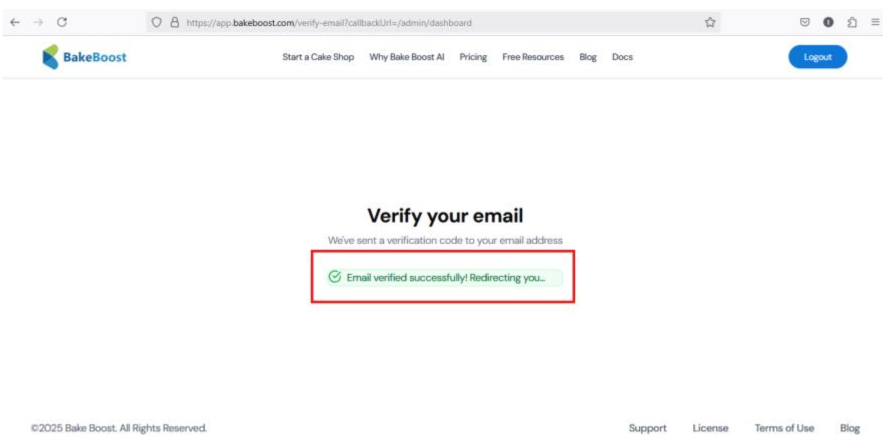
You will receive an email like this below:



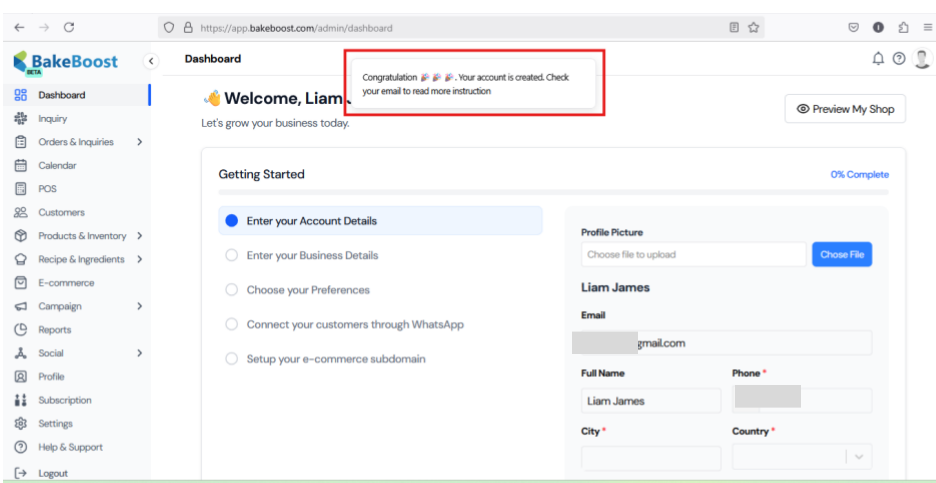


Enter the code and verify your account:

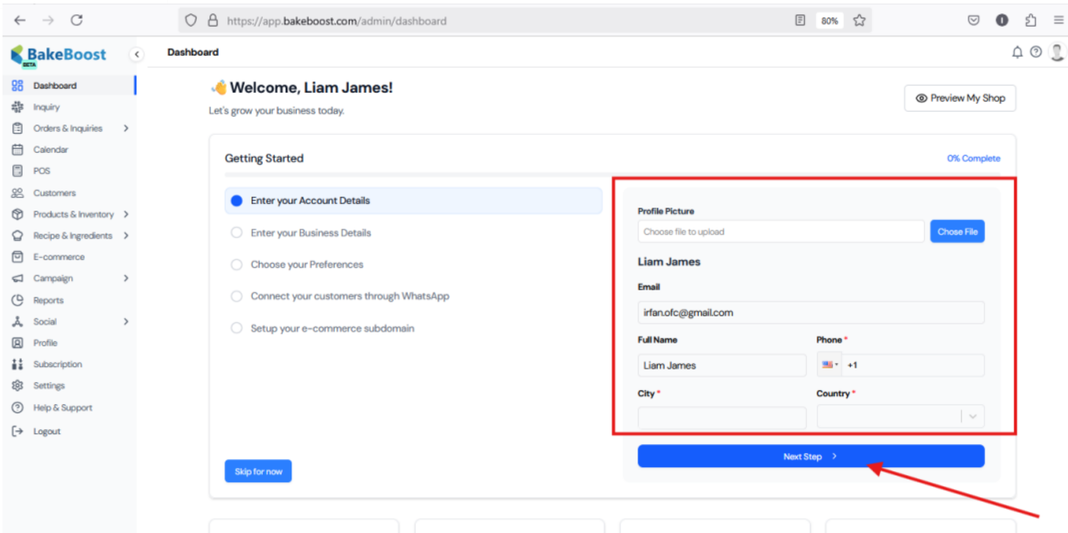




Congratulations: You have successfully registered.

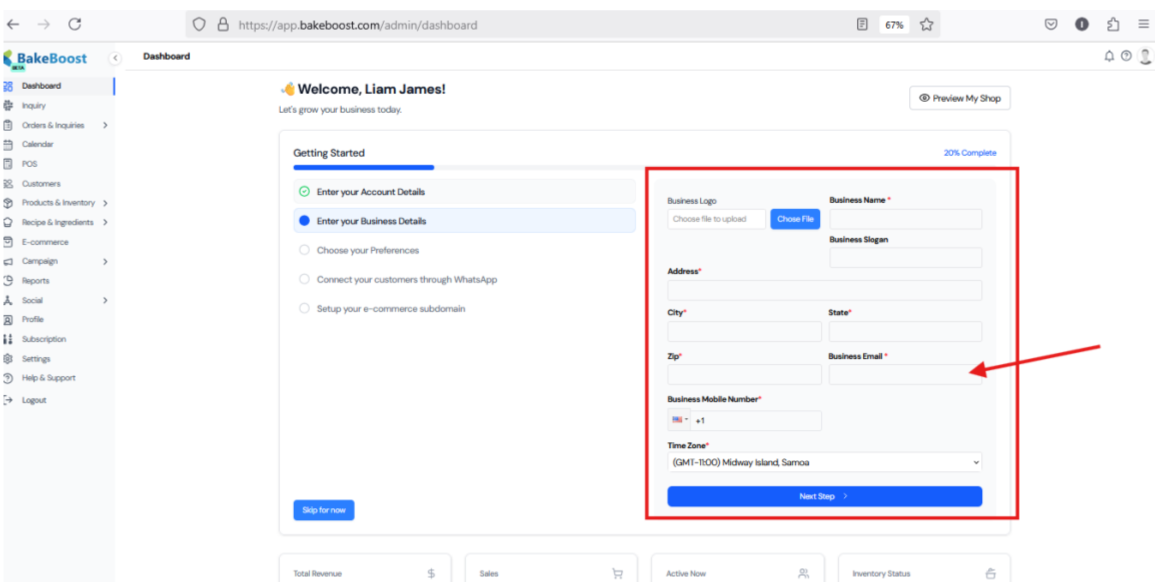


Here you can enter your profile details and then move to the next step:

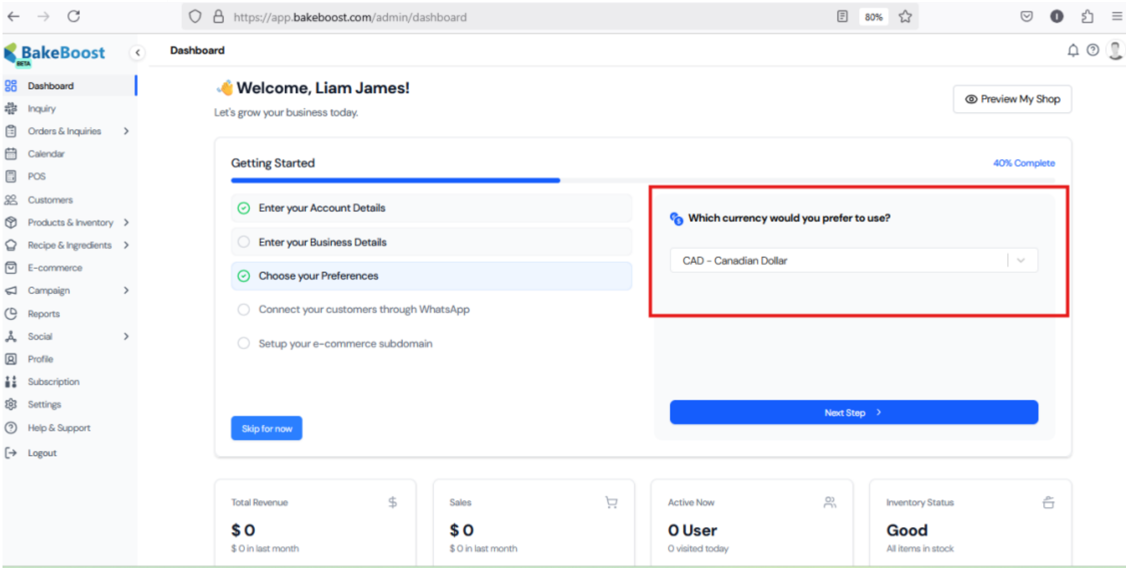


At the second step, you will enter your business details along with the logo file, etc.

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



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



WhatsApp Business Integration:

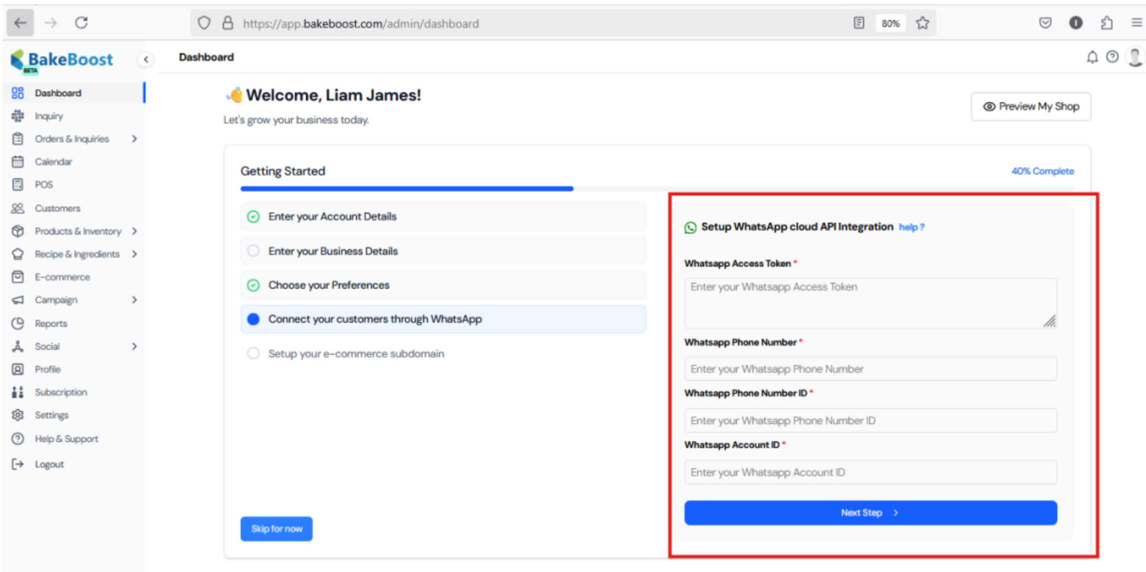
(It's optional, you can skip it if you are not using it or want to set it up later)

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

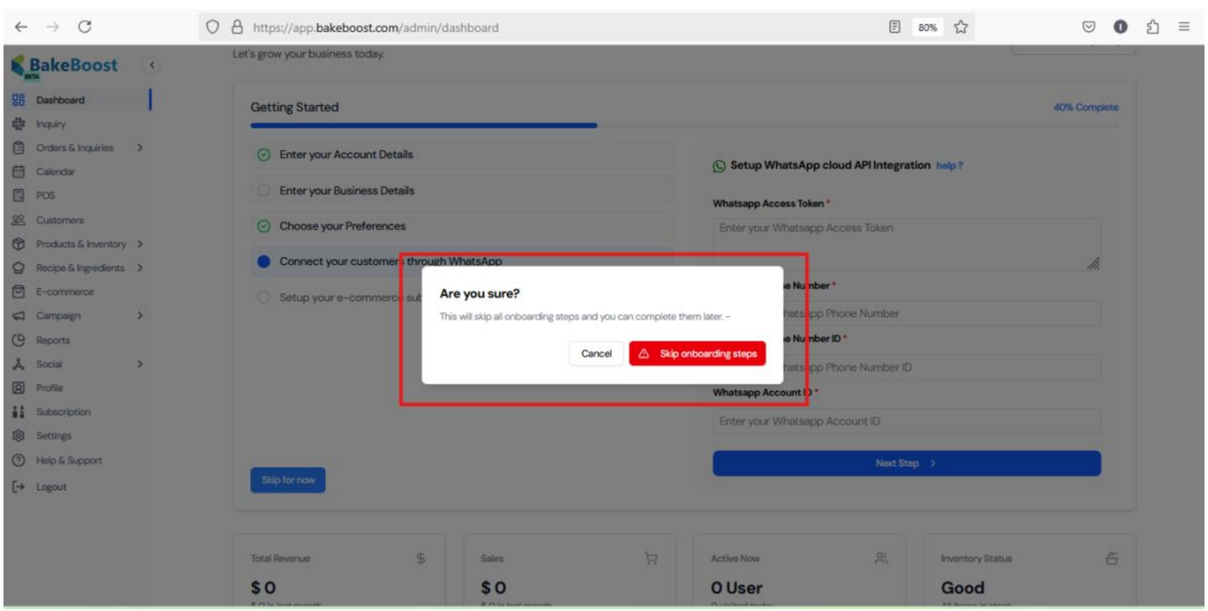
The Detailed documentation is available over this link to set up WhatsApp integration

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

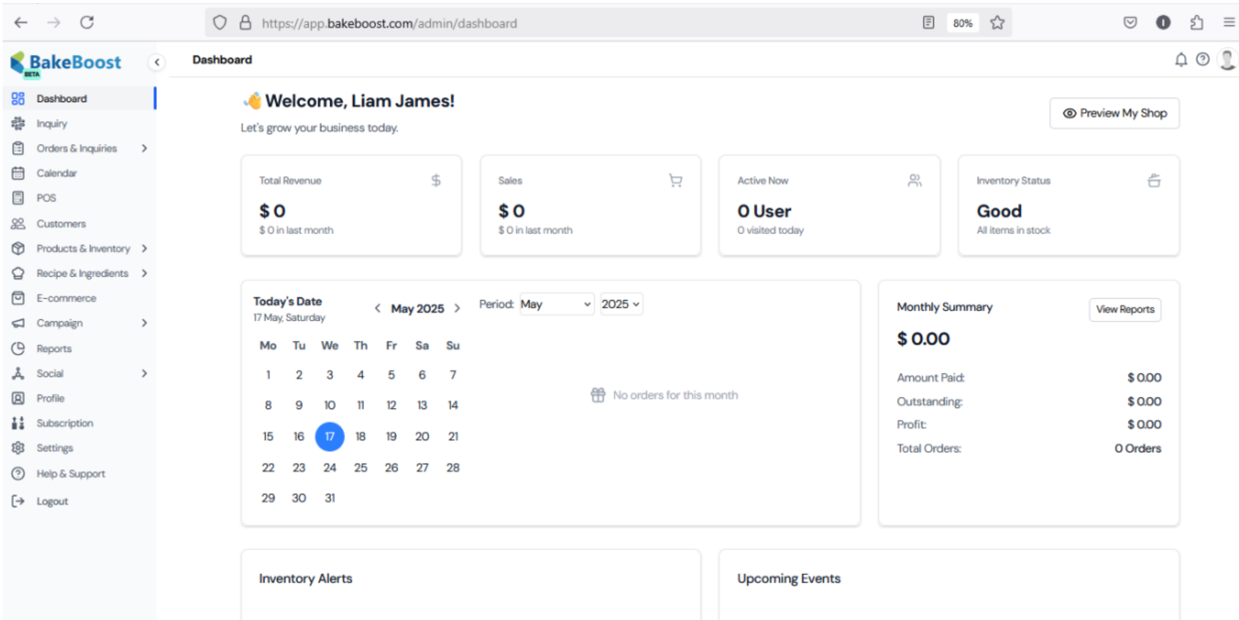


If you want to skip, you can update these later.



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

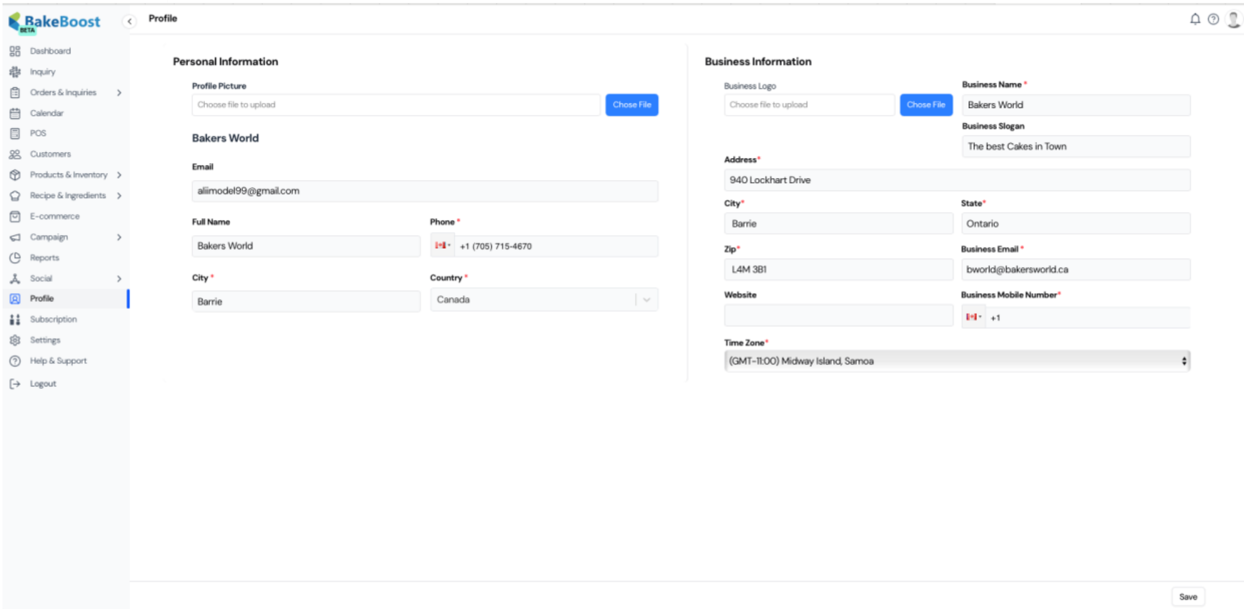
First target is to head over to the Profile page and update your profile:

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

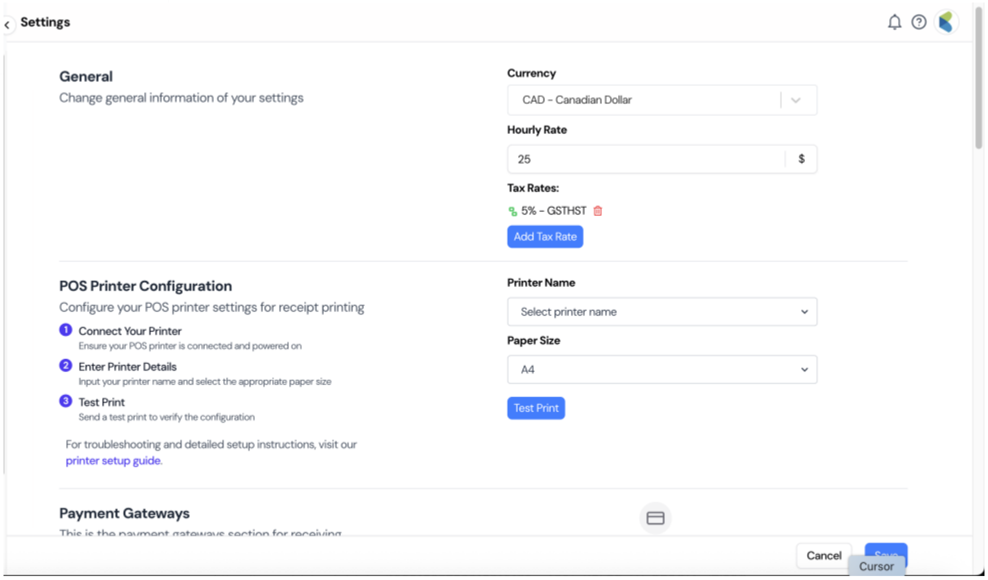


Now let's move to the settings page

Settings:

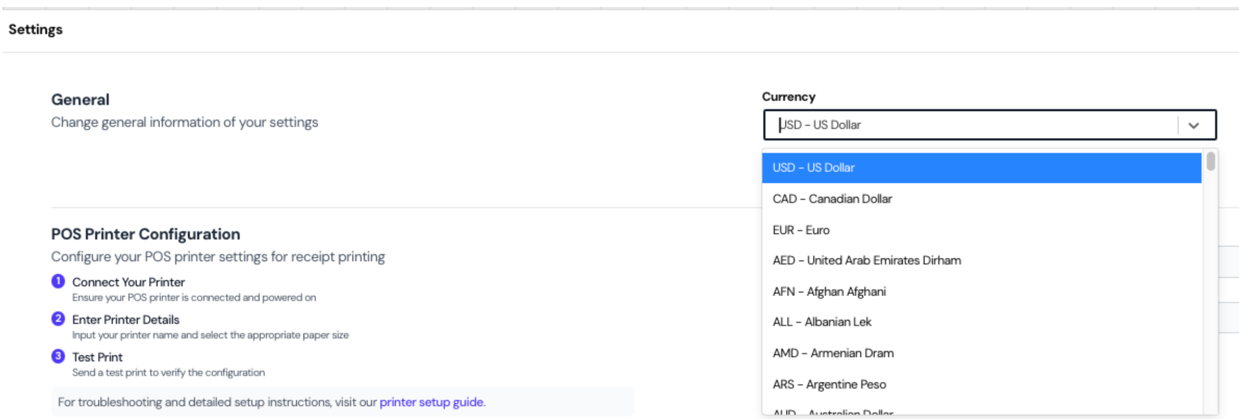
This section is divided into multiple areas:

- 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



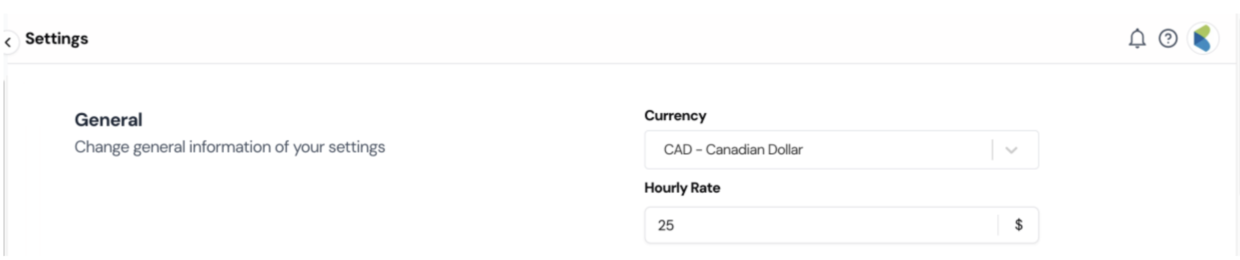
Currency:

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



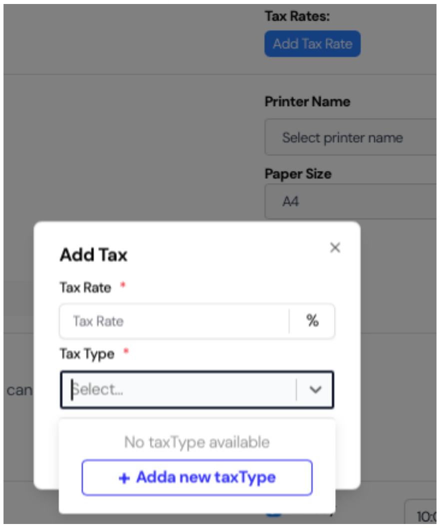
Hourly Rates:

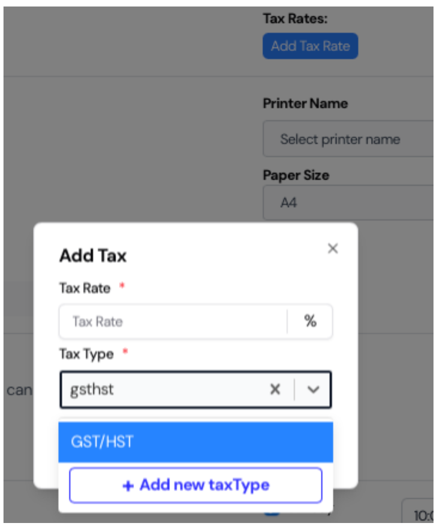
Enter your hourly rates to be used in the Recipe Item



Tax Rates:

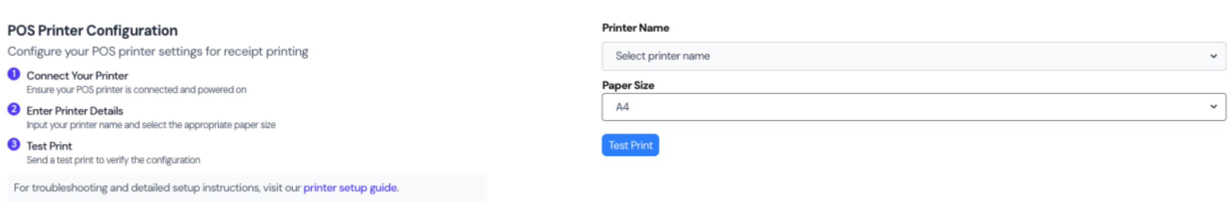
Define your own Tax rates with the codes





Printer settings:

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

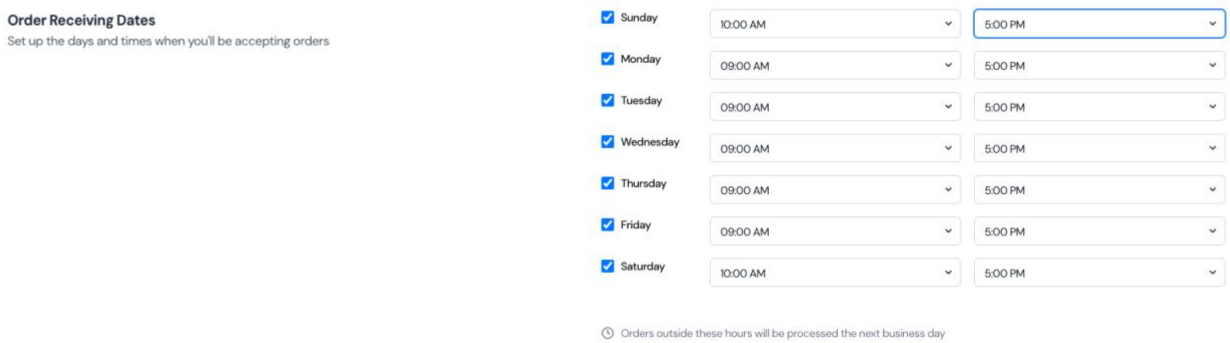


Payment Gateways:

This feature is still in development

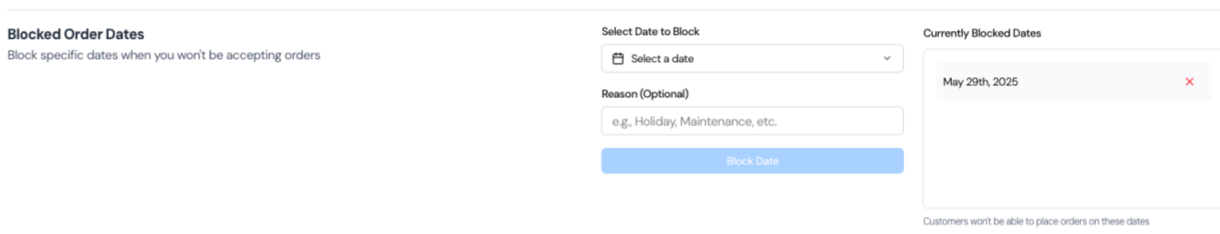
Order Receiving Dates:

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



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.

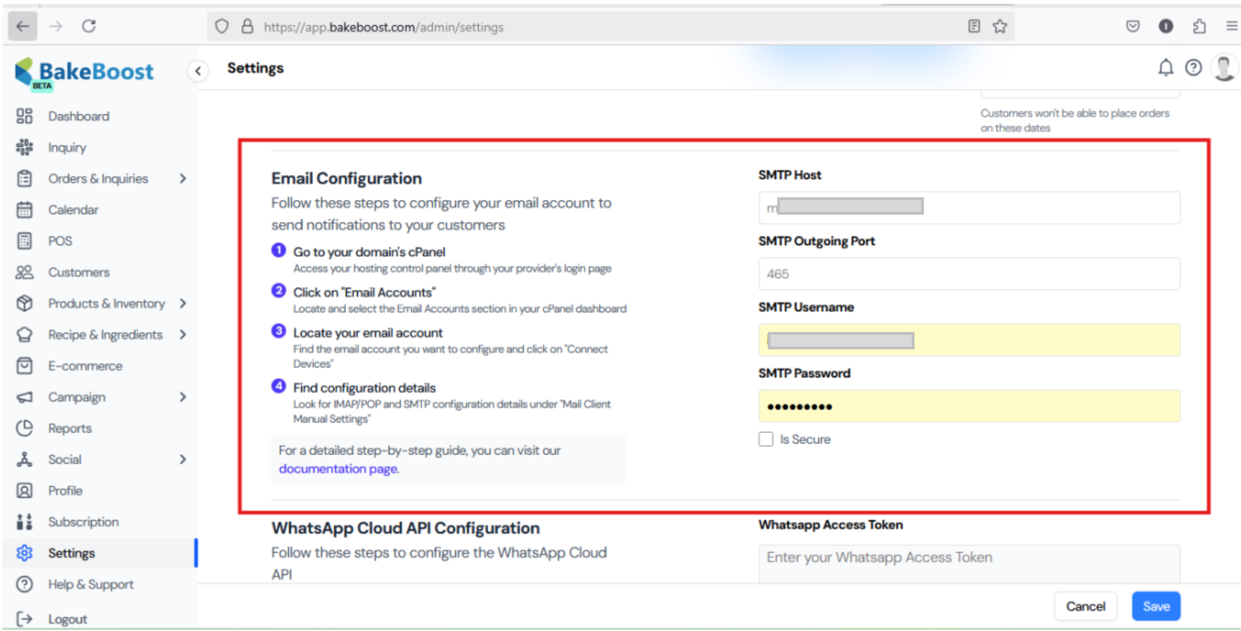


Email Setup Made Easy

To configure email for invoices & communications:

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

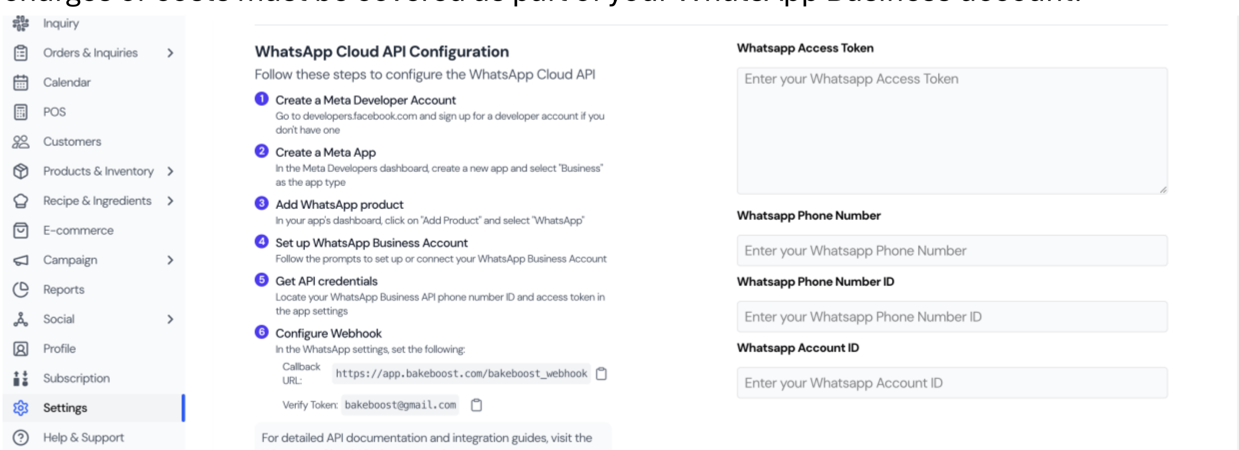
Get professional emails running in minutes!



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

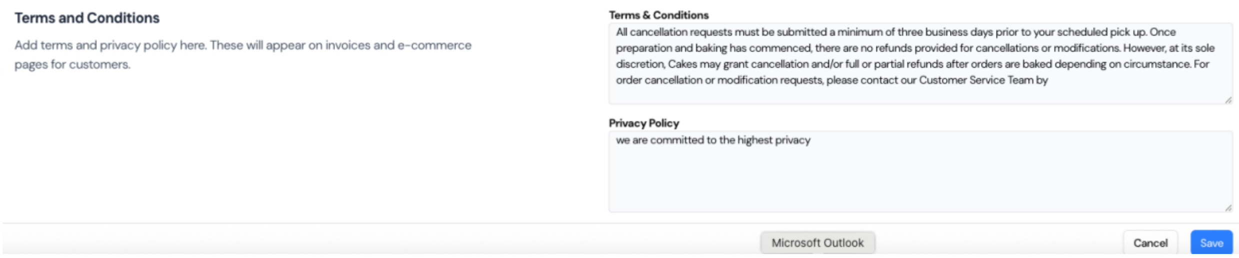
WhatsApp Business API configuration:

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.



Terms & Conditions

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



You are now done with the settings.

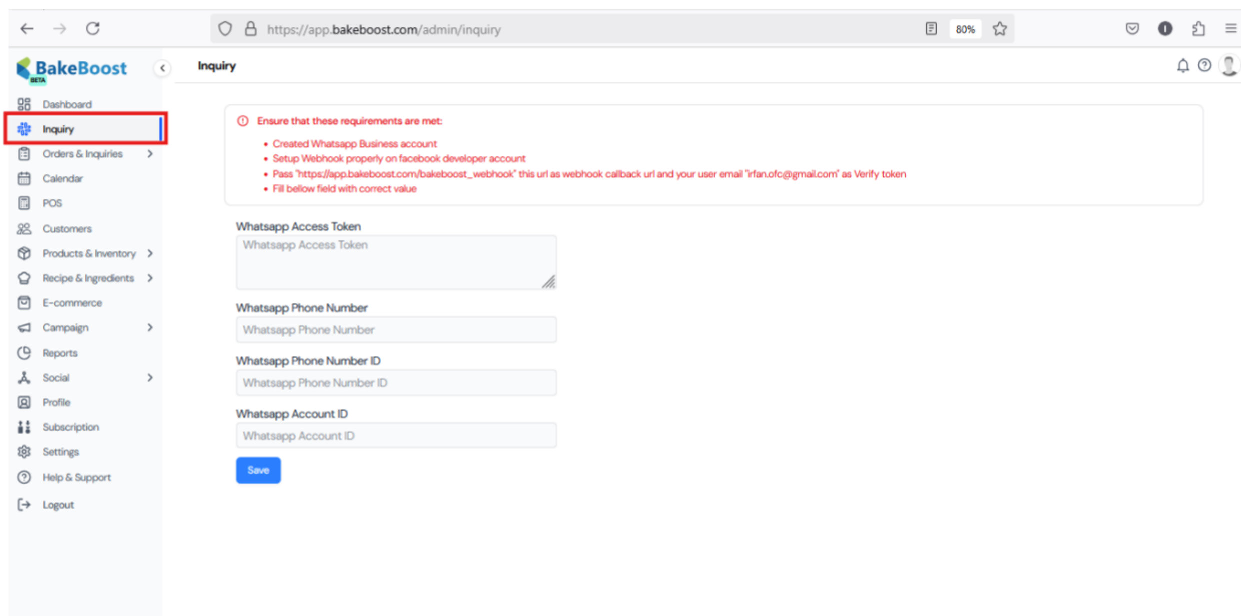
Let’s move to each Feature available in the Bake Boost application.

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.

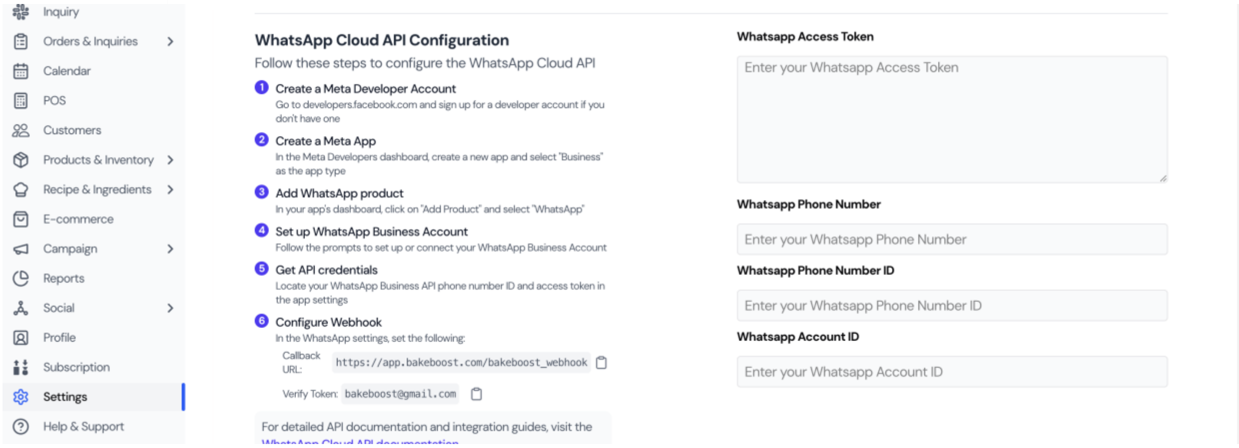
This form will not appear until you have completed setting up your WhatsApp according to the guide available here.

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



The guidance on setting up WhatsApp is also available in

Settings:



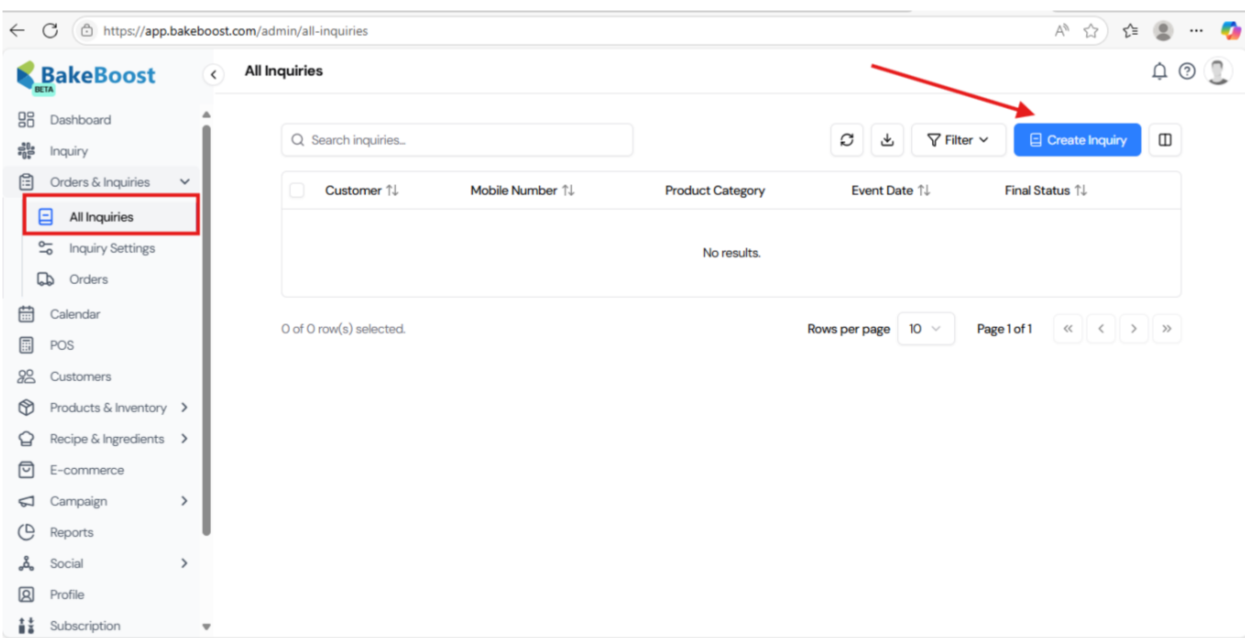
Orders & Inquiries

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

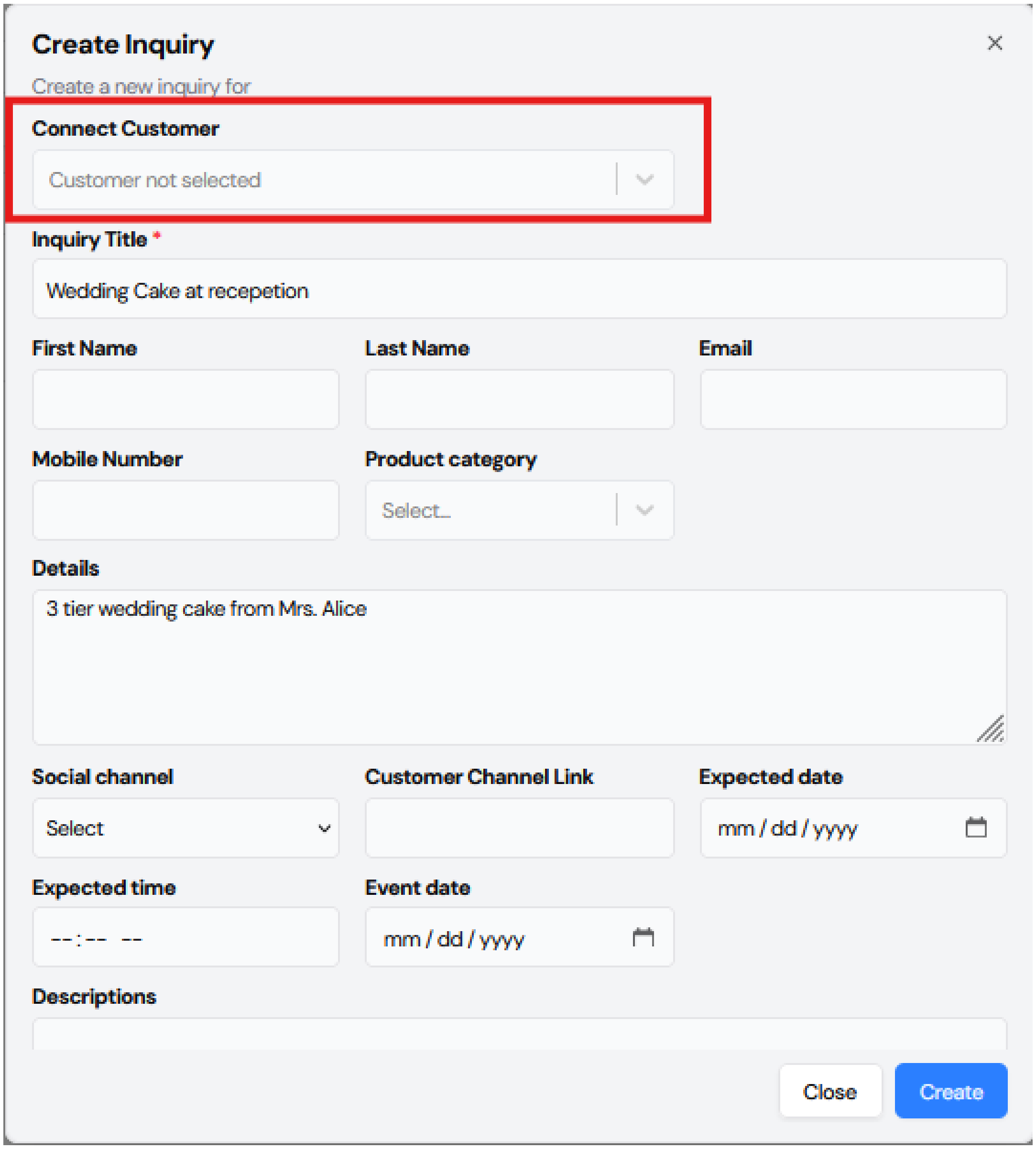
Two ways to manage inquiries

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:



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



Manage Inquiries with One Click!

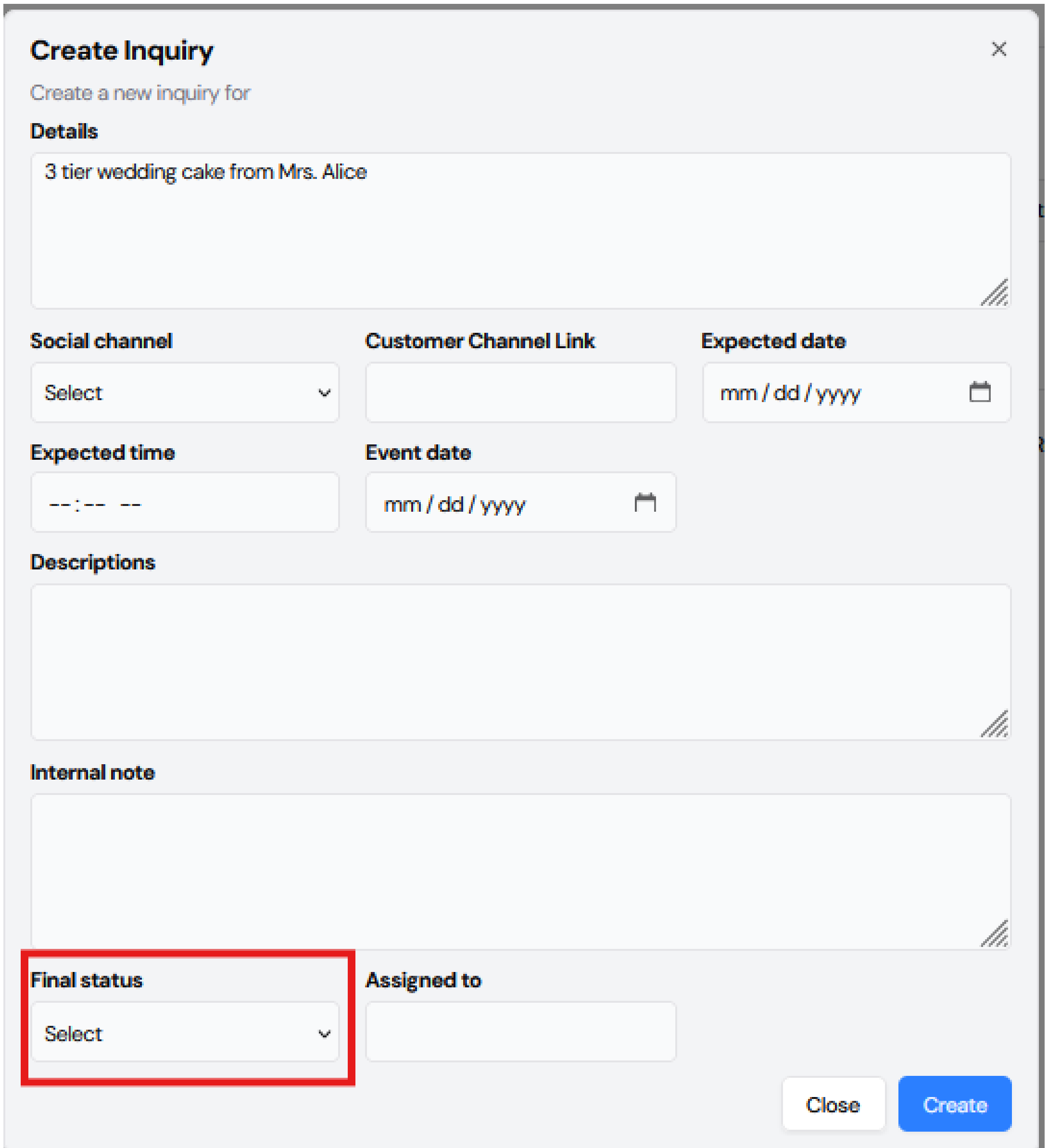
From the **Final Status** tab, easily update any inquiry to:

✅ **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!

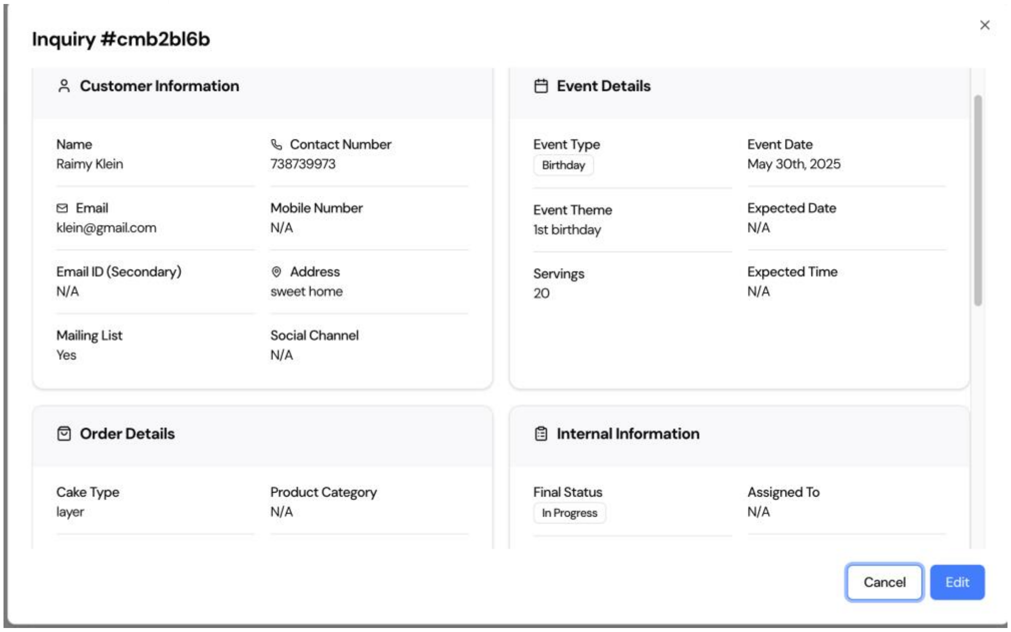
Boost Conversions with Thoughtful Follow-Ups!

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!



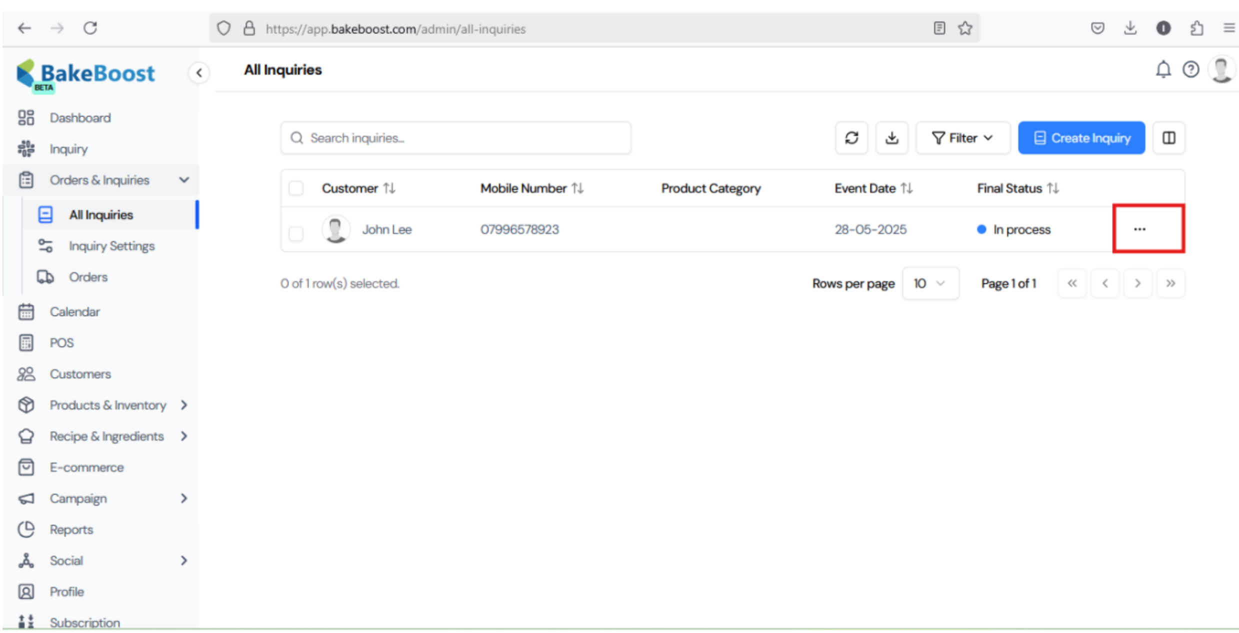
Inquiries coming from your Inquiry Page

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



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!

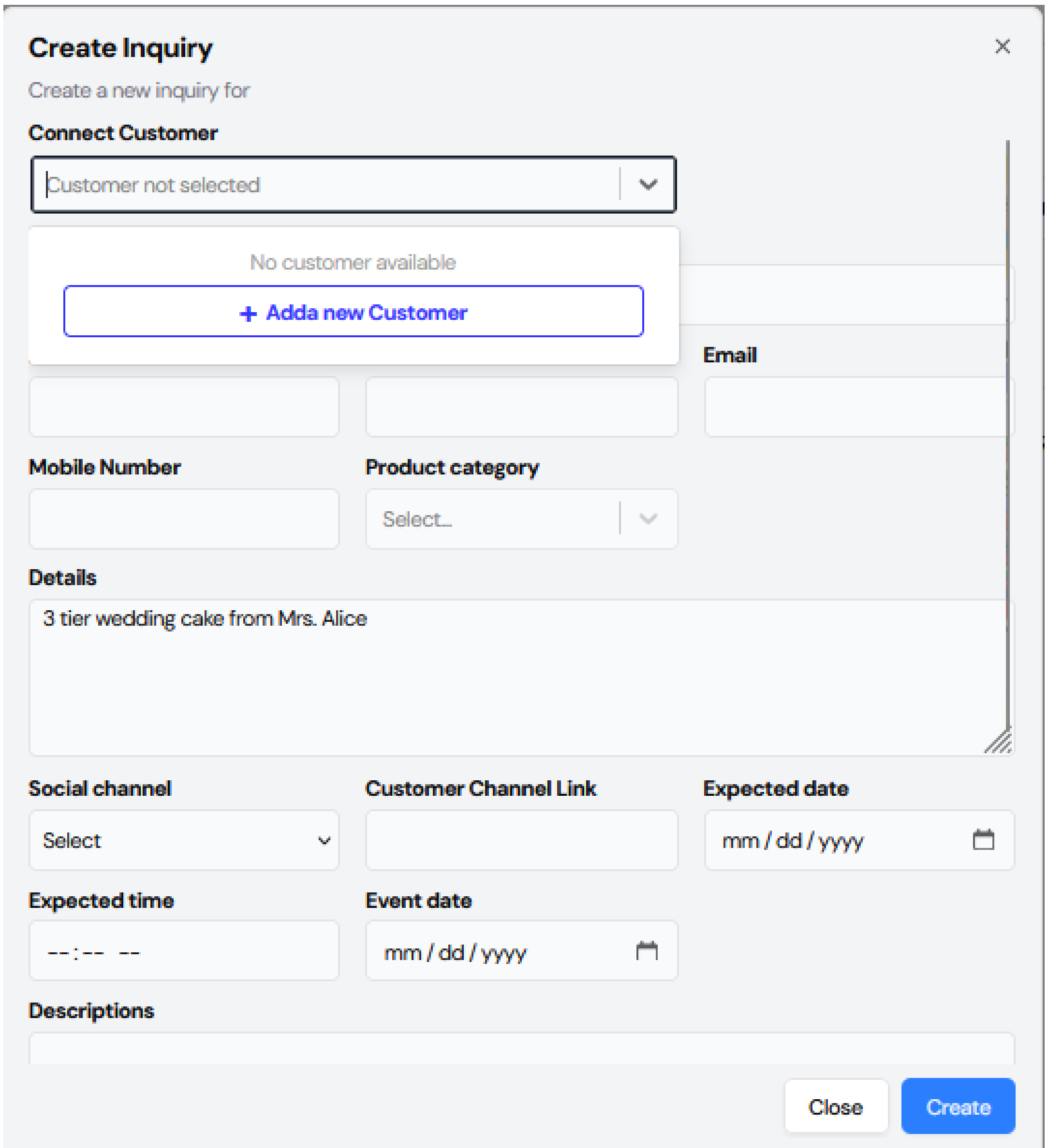


Two Ways to Add Customers:

1- **Customer Tab** - Create customer profiles directly

2- **Inquiry Tab** - Automatically add when creating new inquiries

Build your client database effortlessly!



Customer Management Made Easy

Use the Customer tab to:

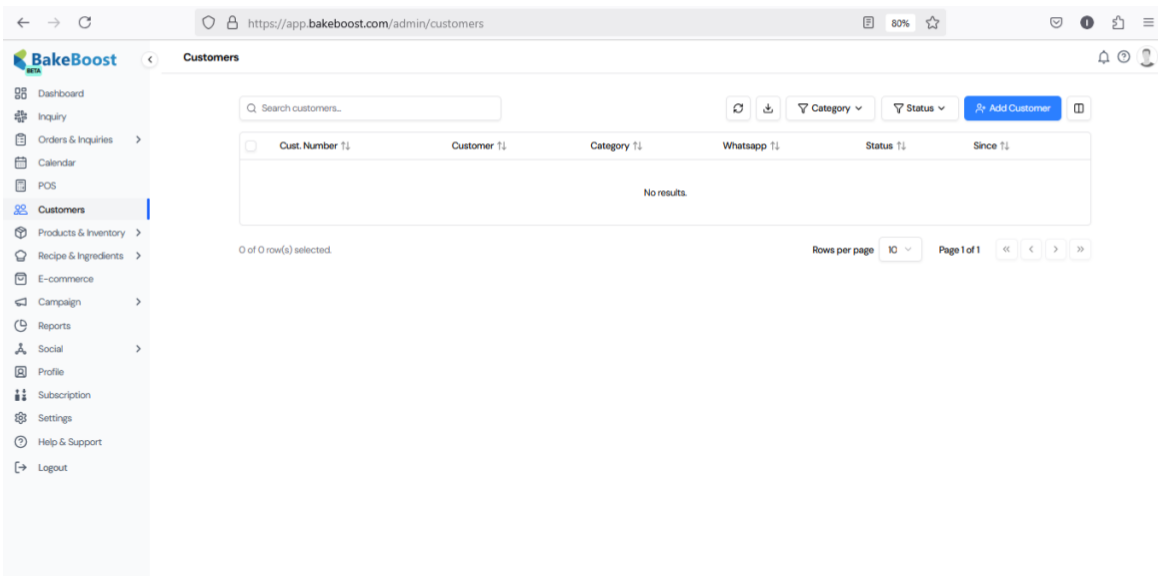
🔷 Create new customer profiles

🔷 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

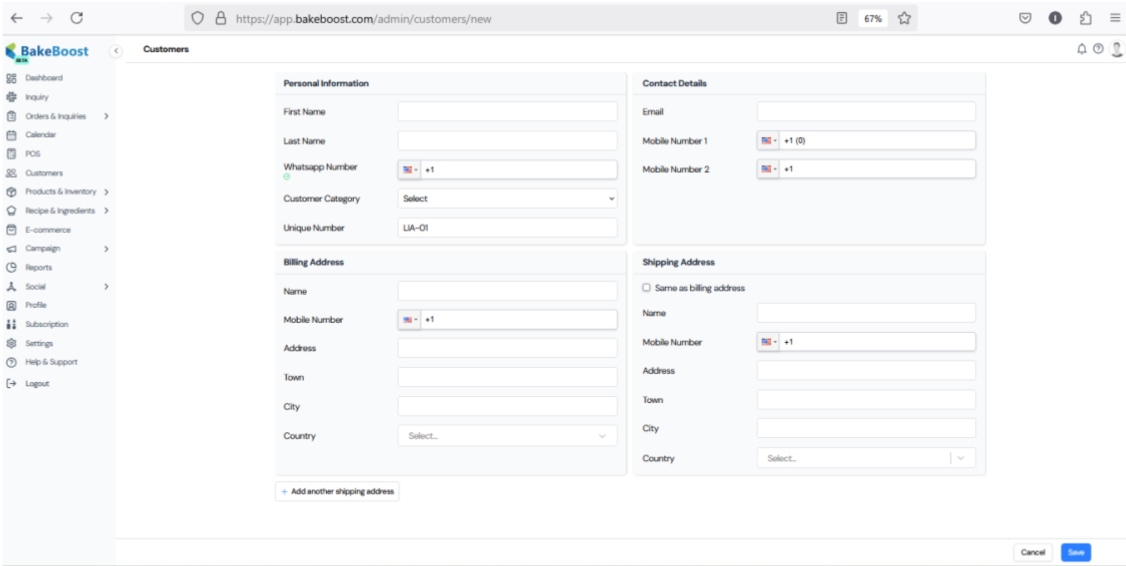
Store complete customer details in one place:

• Full name (First + Last)

• Primary Mobile / WhatsApp number

• Email address

• Multiple contact numbers



Smart Customer Categorization

Easily segment your customers by:

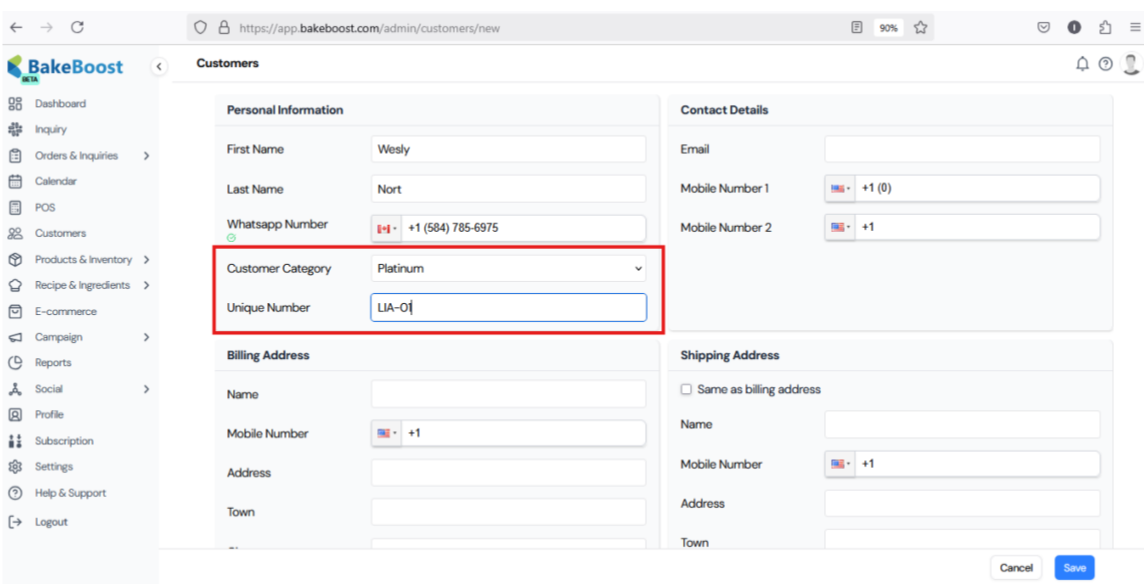
• **Purchase Value**: Platinum, Gold, Silver, Bronze, or any Overseas gift for someone in your area.

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!

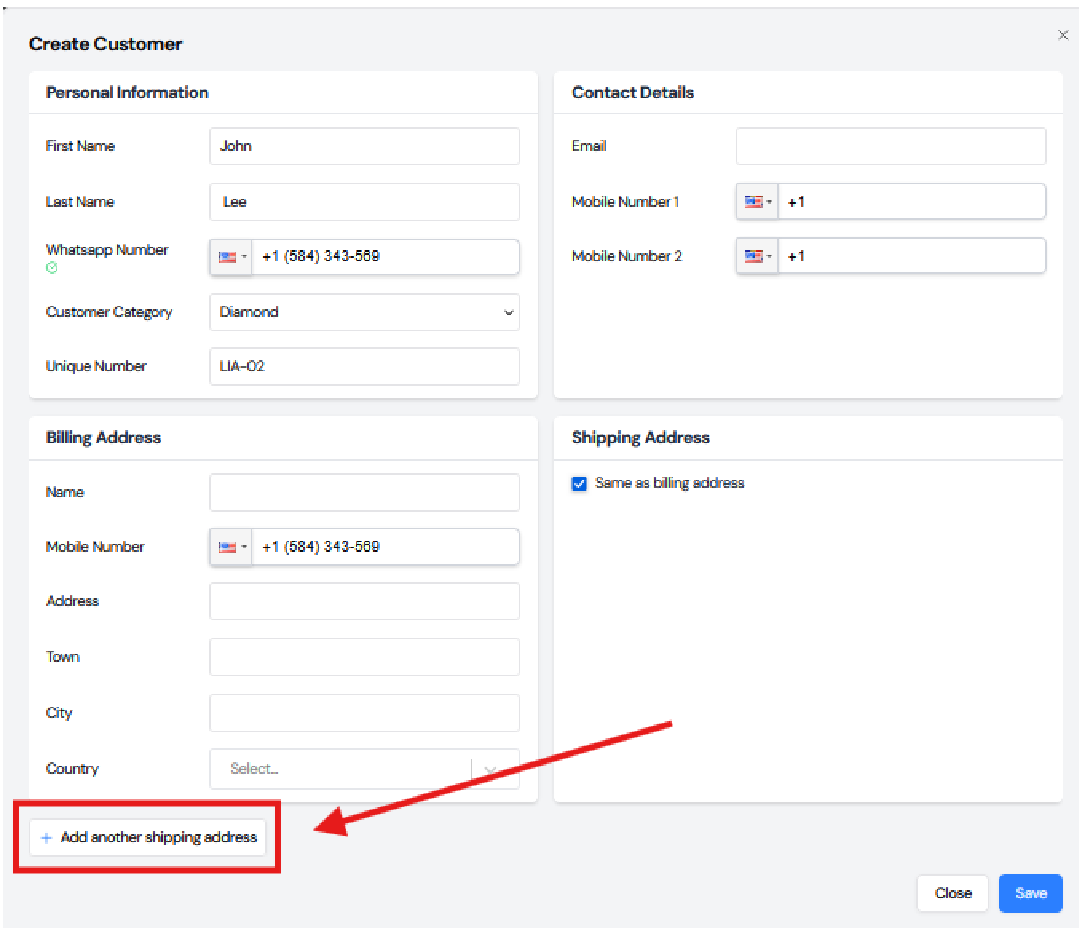


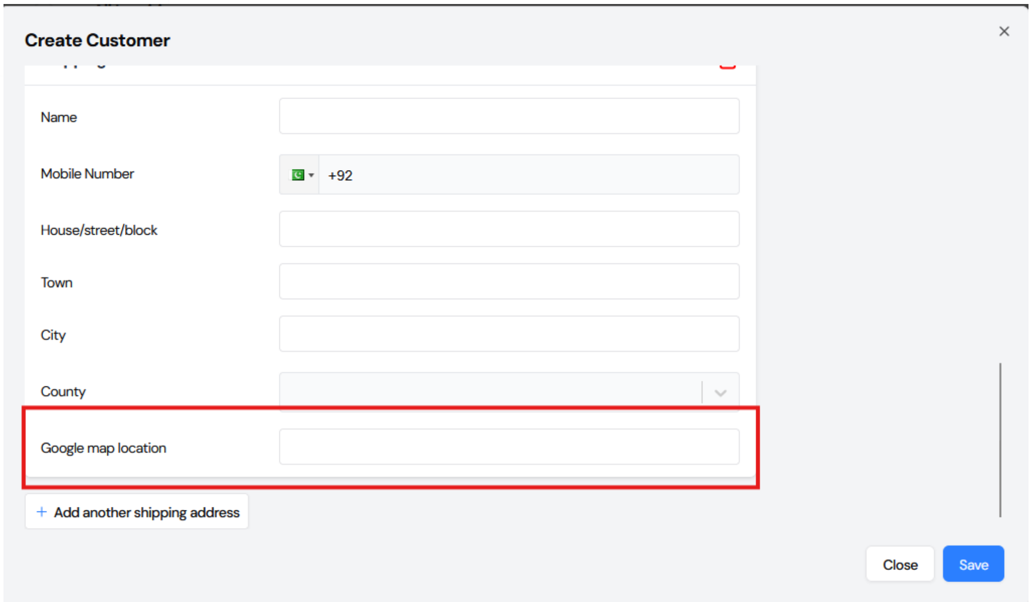
Flexible Delivery / Shipping Options

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!



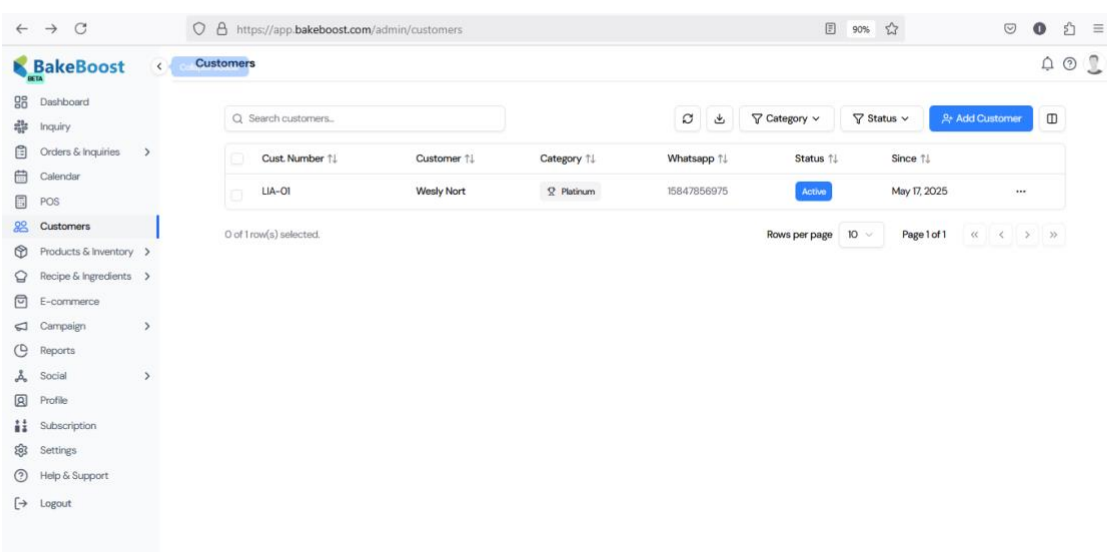


Your Complete Customer Hub

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!



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.

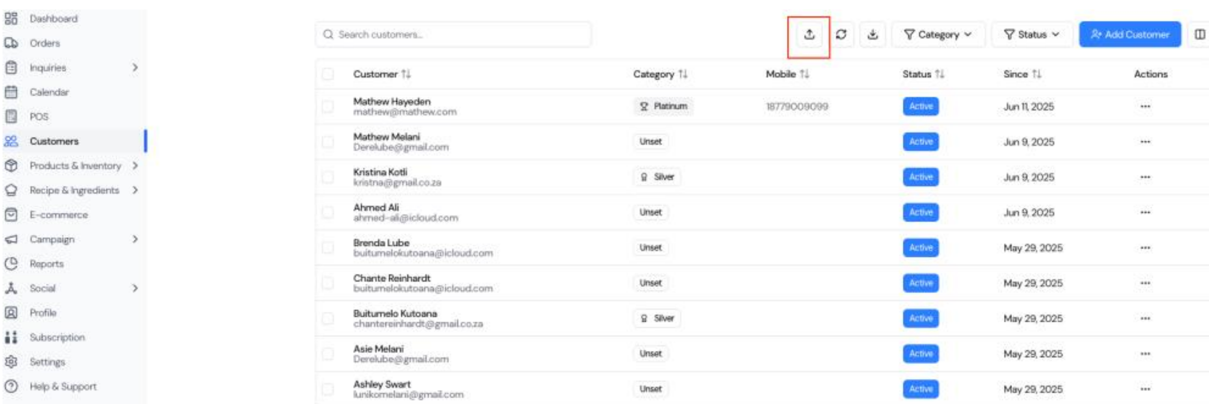
As of this update, our focus is on supporting Master Data, which includes your contacts/customers, Products, and Ingredients. No transactional data, such as your order history from the last two or five years, can be loaded.

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.

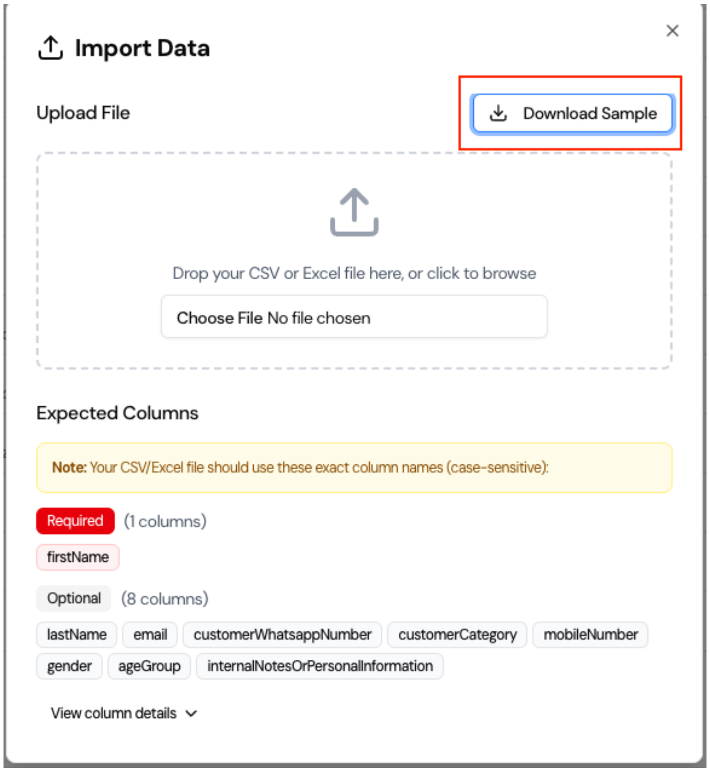
Customer contacts Upload/Import to Bake Boost

Go to your Customers Menu

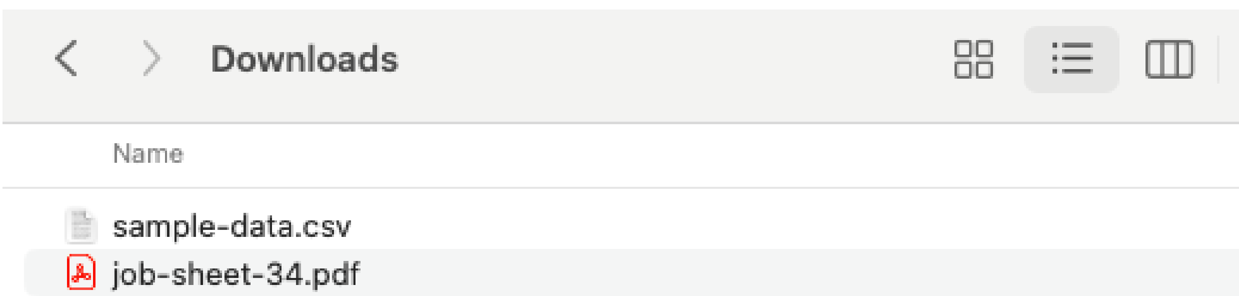
and click on the Import Button



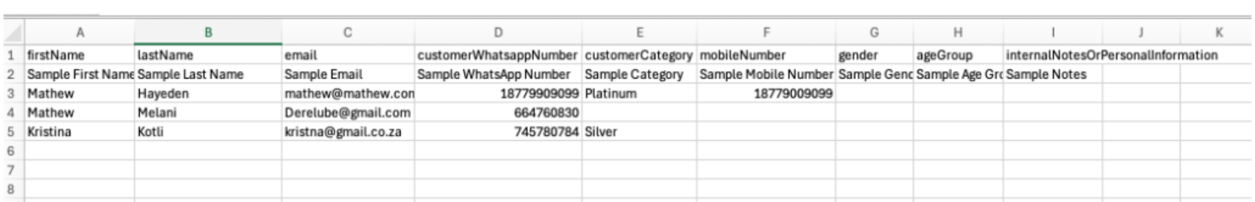
It will open this Form and in this form download the Sample File:



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 Genc	Sample Age Grc	Sample Notes		
3	Mathew	Hayeden	mathew@mathew.con	18779909099	Platinum	18779009099					
4	Mathew	Melani	Derelube@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.

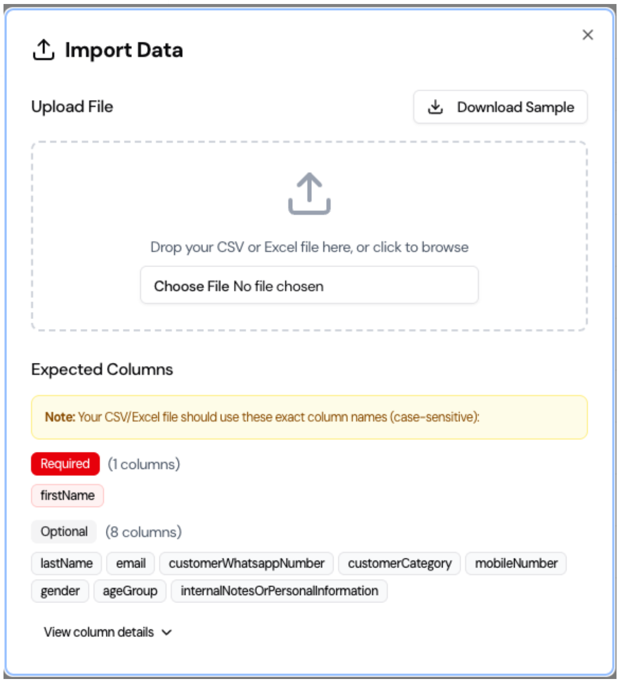
Now you need to copy the columns of your data into the respective data columns

- 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

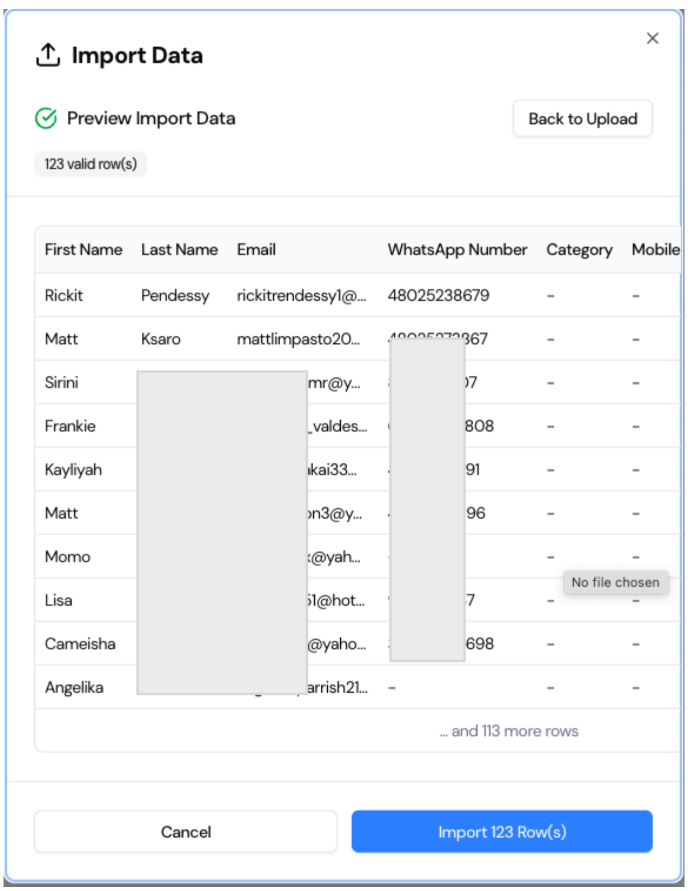
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	firstName	lastName	email	customerWhatsappN	customerCategory	mobileNumb	gender	ageGroup	internalNotesOrPersonalInformation					
2	Rickit	Pendessy	rickitrendessy1@gm	48025238679										
3	Matt	Ksaro	mattlimpasto2020@	48025273867										
4	Sirini	Ngongor	sirinifonkamr@yaho	8562641907										
5	Fran		co_valdes@rc	623-5										
6	Kayli		nnakai33@gn	4591										
7	Matt		oson3@yahoc	0996										
8	Mom		0x@yahoo.com											
9	Lisa		ez51@hotma	2067										
10	Cam		.ca@yahoo.c	347-2										
11	Ange		a.parrish21@gmail											
12	Katie		omsyck@gma	9635										
13	Jubil		trinitie@gma	7601										
14	Taylo		tr@gmail.con	4357										
15	Tish		ngebrew@gn	623-6										
16	Jenn		entable@gma	2905										
17	Chef		on.luxcatering	480-3										
18	Rhor		ttmom@gma	480-2										
19	Vivia		avison88@gmail.cc											
20	Cand		e@chefsshar	7028										

Now, come back to the Customer and Import feature:



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.

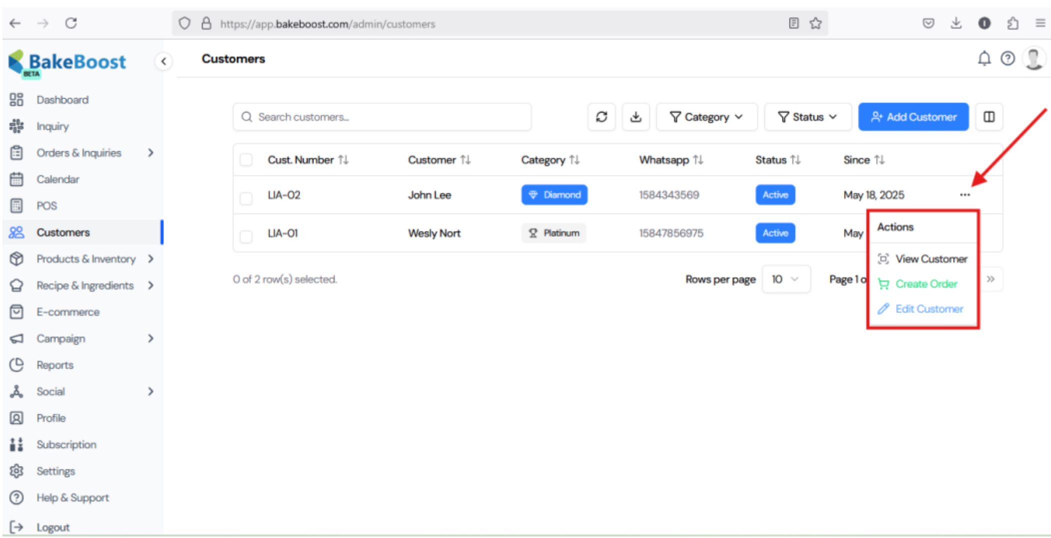


If you have a large data file, we suggest breaking it into smaller files, and you can upload them multiple times to the application. This will help you avoid errors and make the upload process smoother.

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.

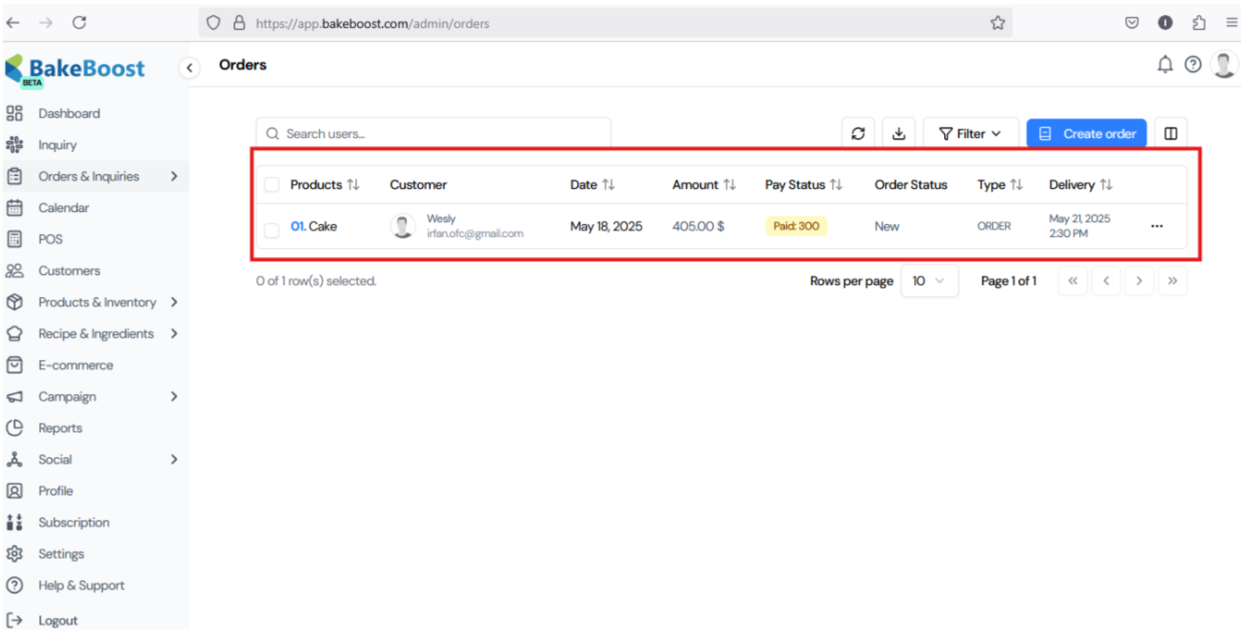
- **Refresh, Download, and More Options:** Includes actions to refresh data, export orders, or apply additional settings.

◆ **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)

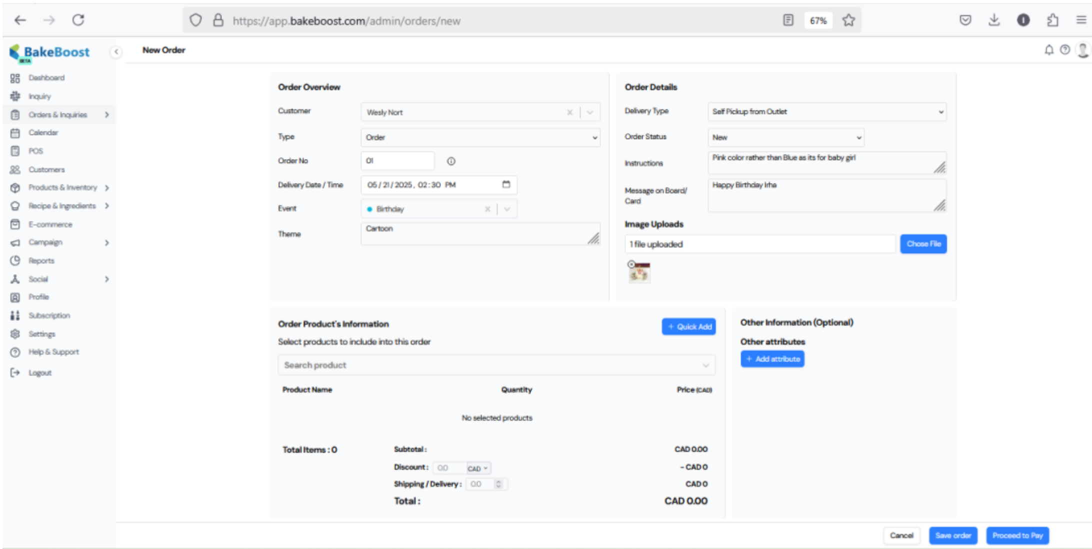
- **Search product:** Field to search and select products to include in the order.
- **Quick Add:** Button to quickly add products.
- **Add Item:**
  - Add Product
  - Recipe Item

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.



Quick Add Any Product

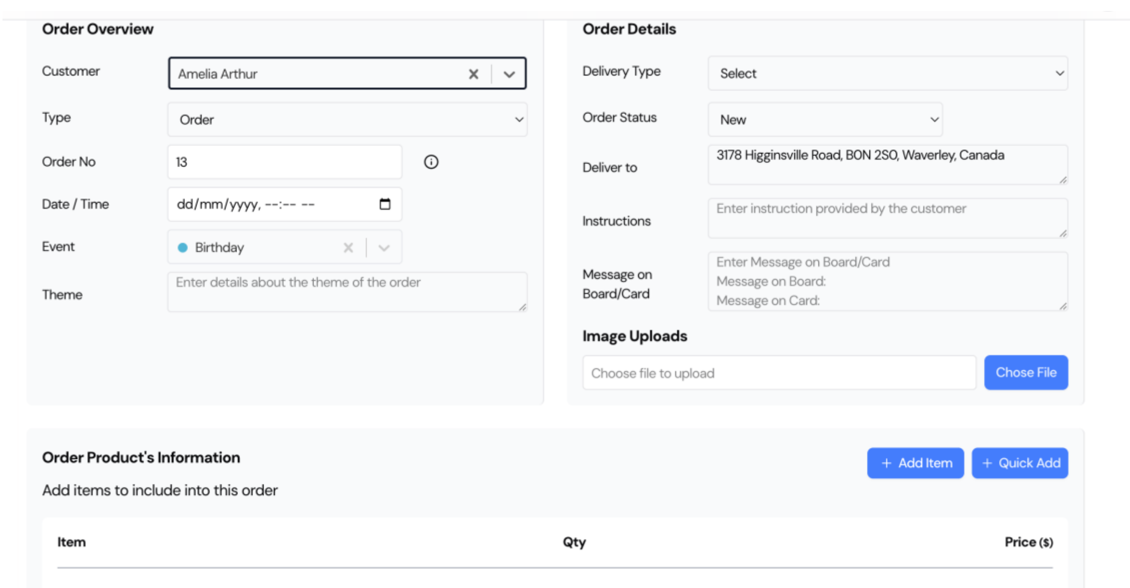
Use the **Quick Add** option to create instantly:

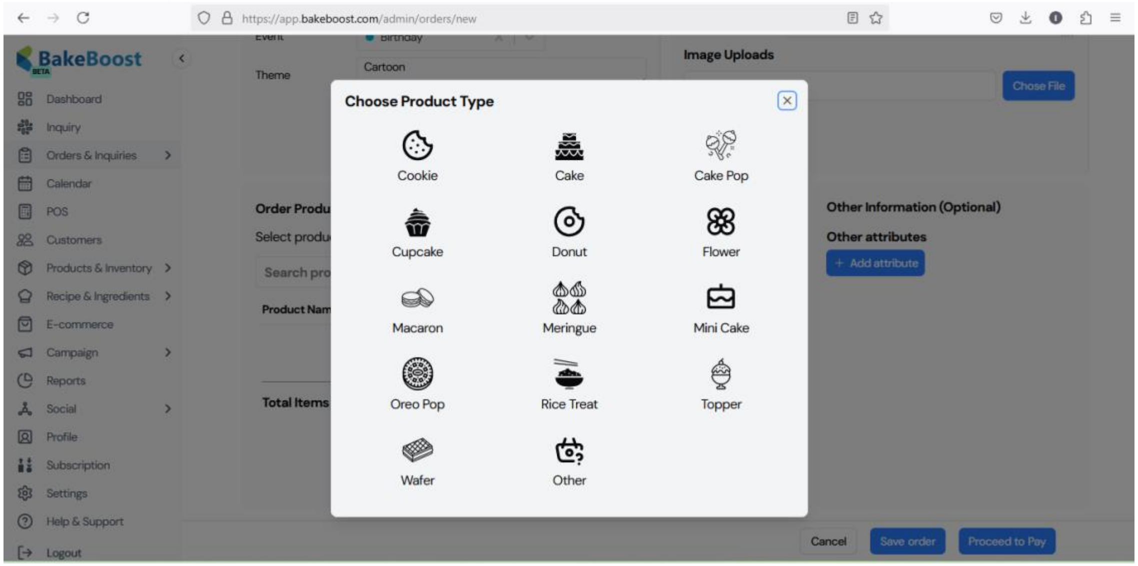
• One-time items (not in your catalog)

• Popular products like:

- Cakes | Cookies | Cupcakes
- Donuts | Cake Pops | Toppers

Perfect for custom/special orders!



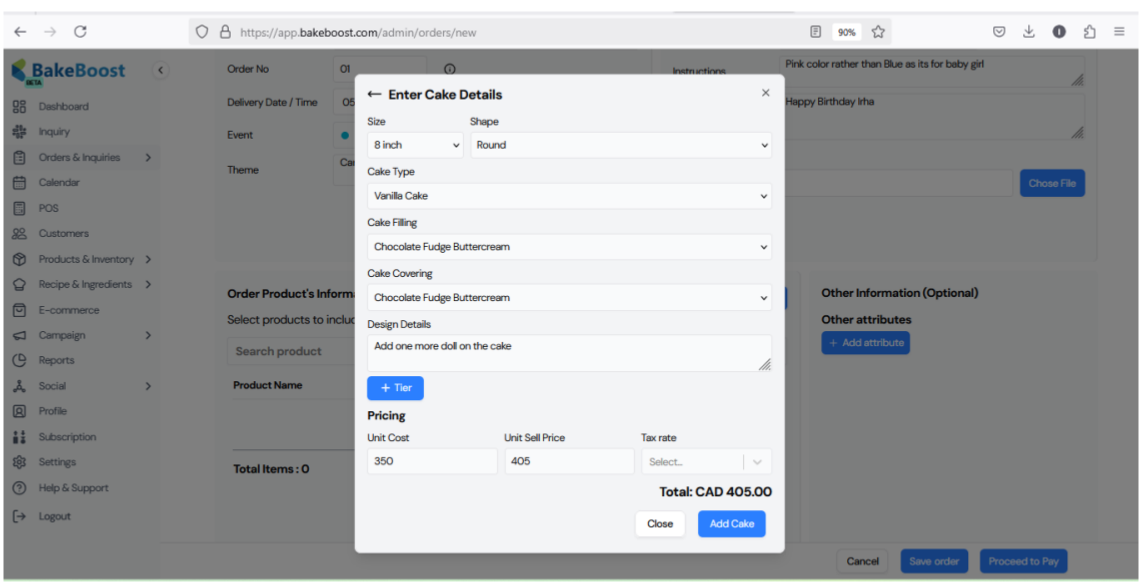


Custom Cake Ordering

Add precise cake details in seconds:

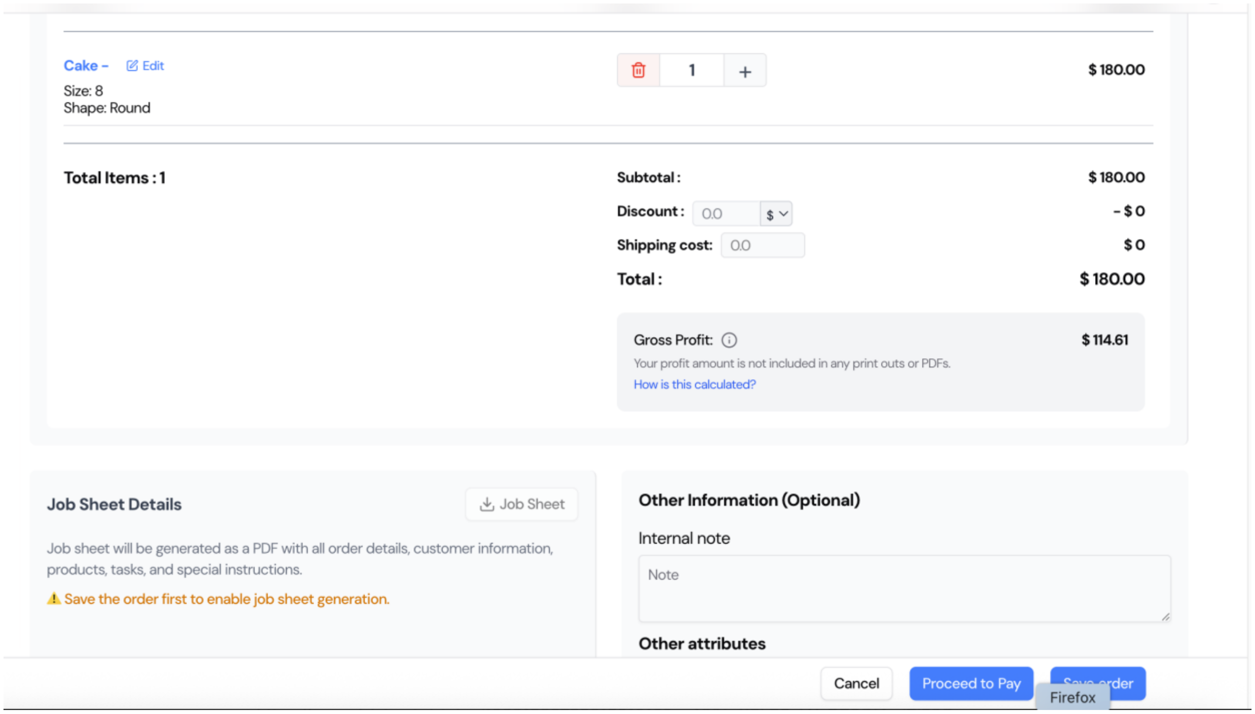
- **Size & Shape**
- **Type & Filling**
- **Covering** (Fondant/Fresh Cream)
- **Custom Design Notes**

Perfect for capturing every special request!



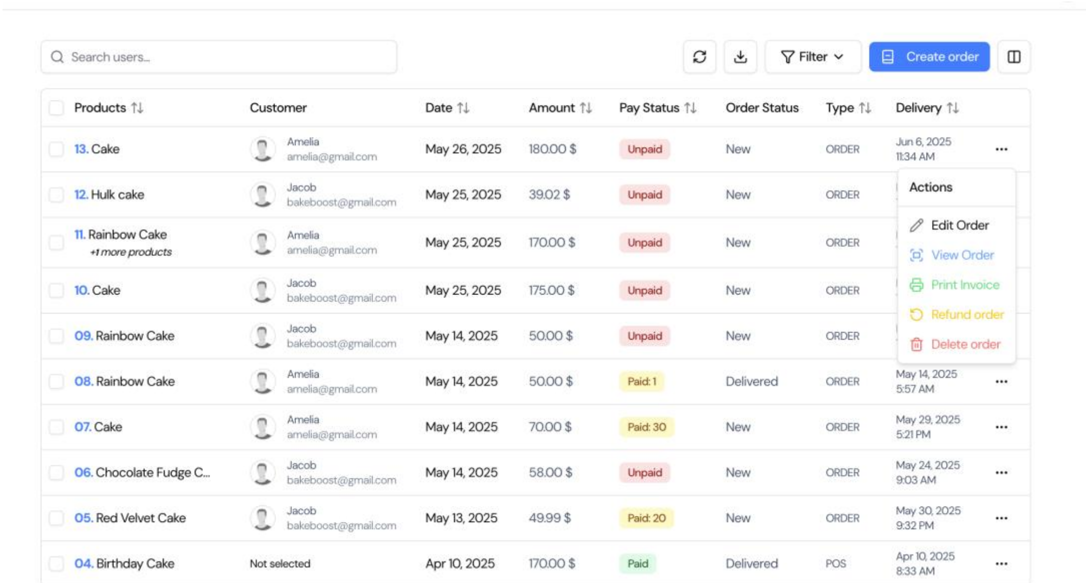
Finalize Custom Cake Orders

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



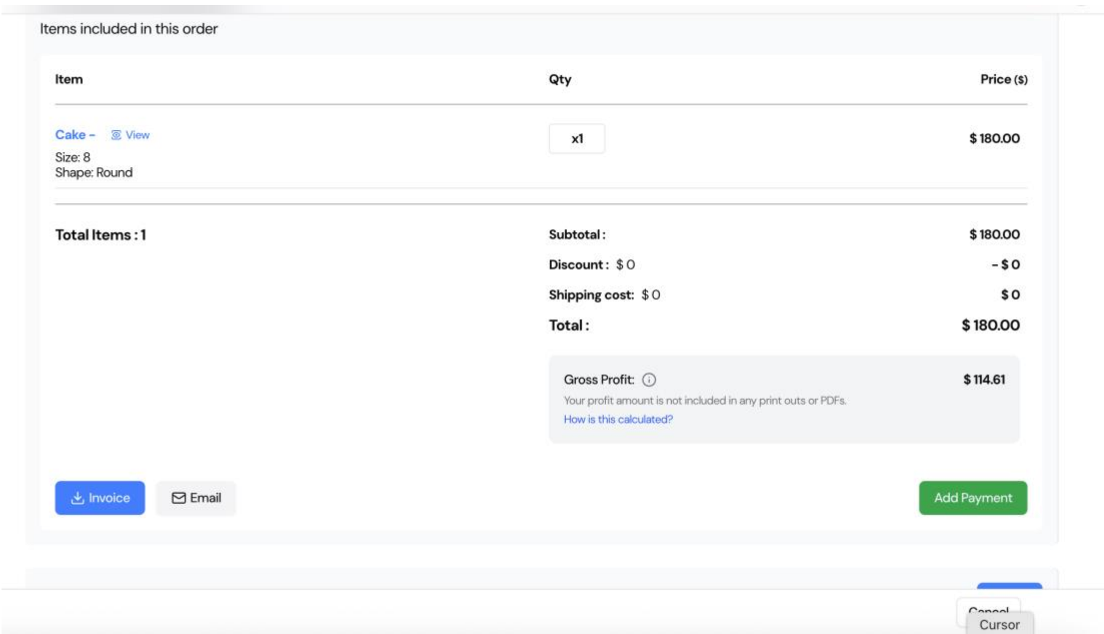
After saving the Order, you will be taken to the main Orders dashboard.

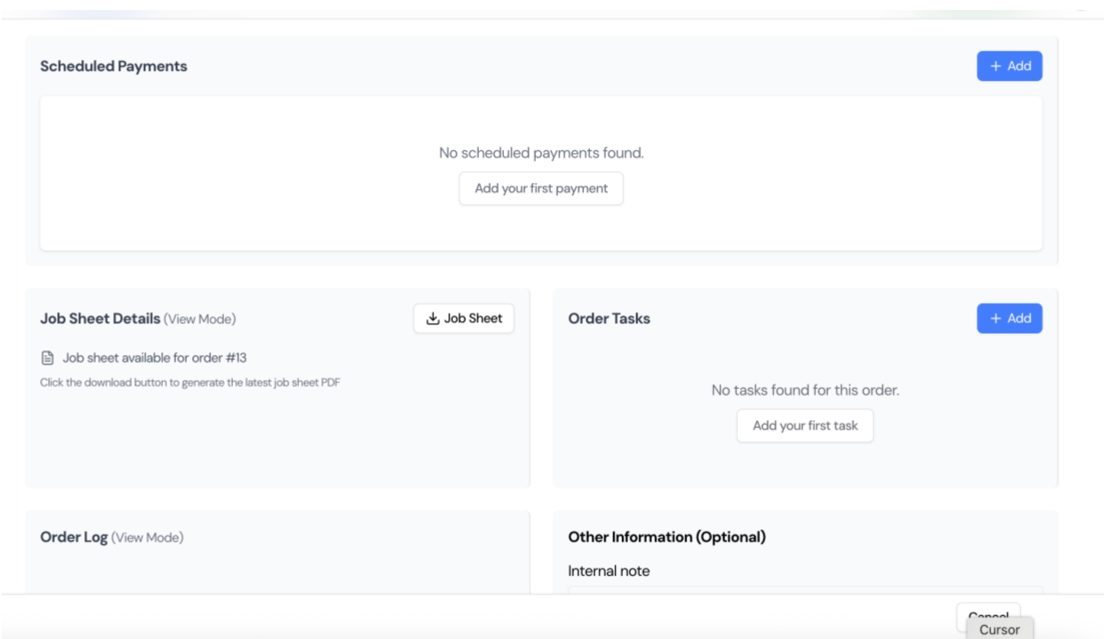
Click the three dots > View Order



View Order:

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

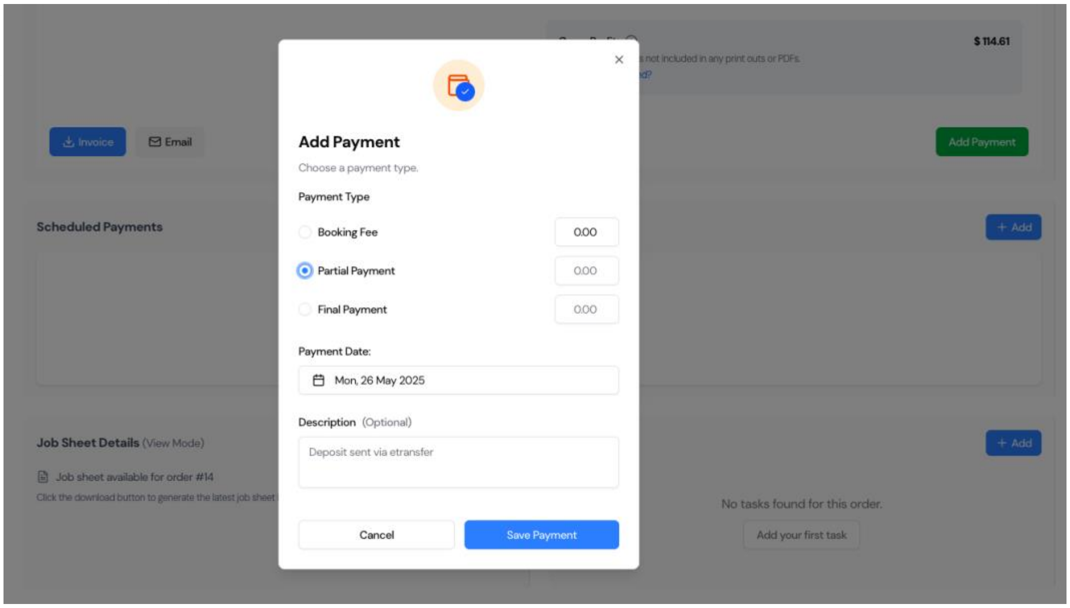


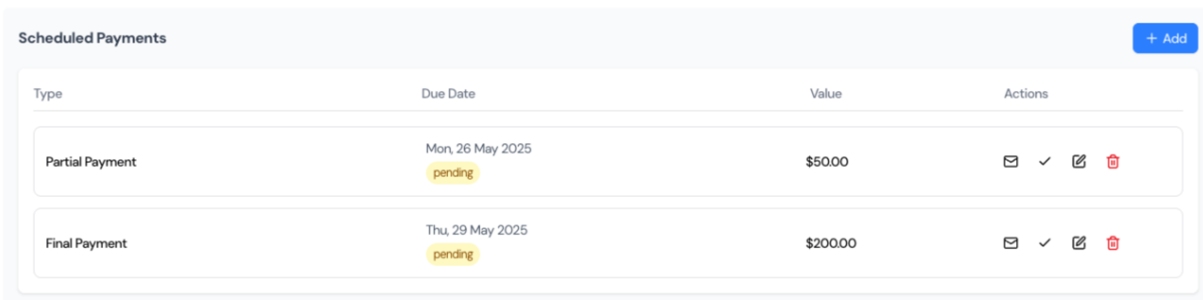


From the view Orders.

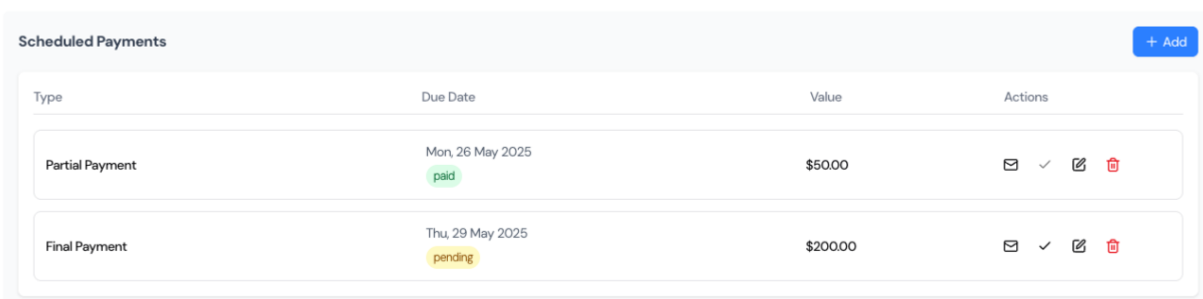
You can send an email, download the invoice, or schedule payments.

Add payments:





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



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**

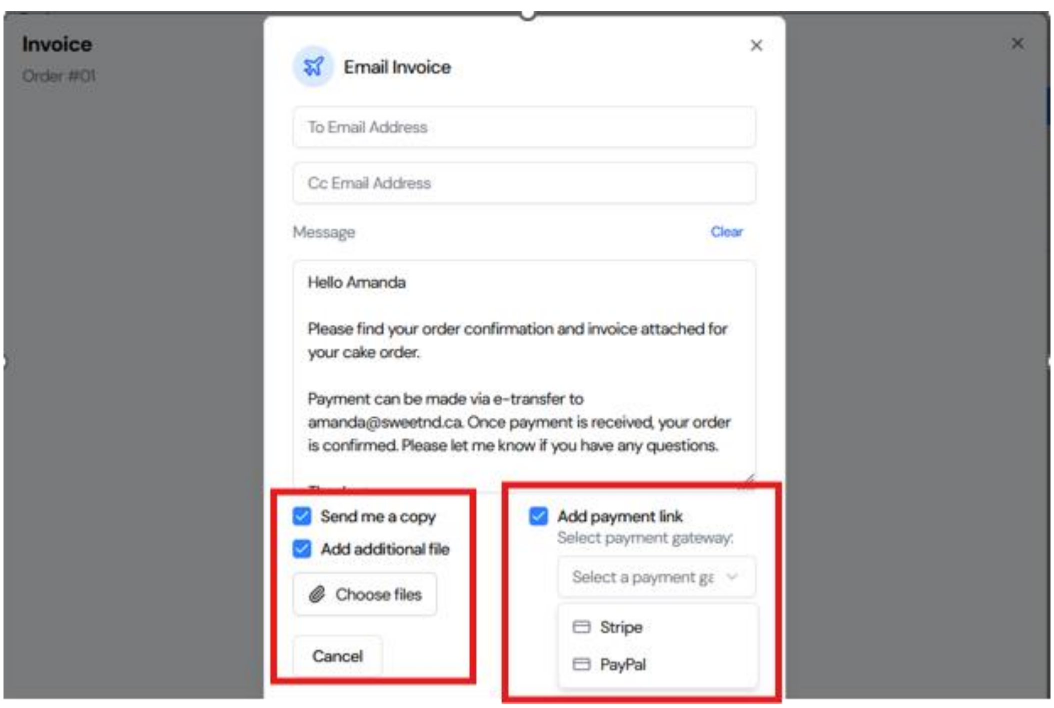
- Include additional files

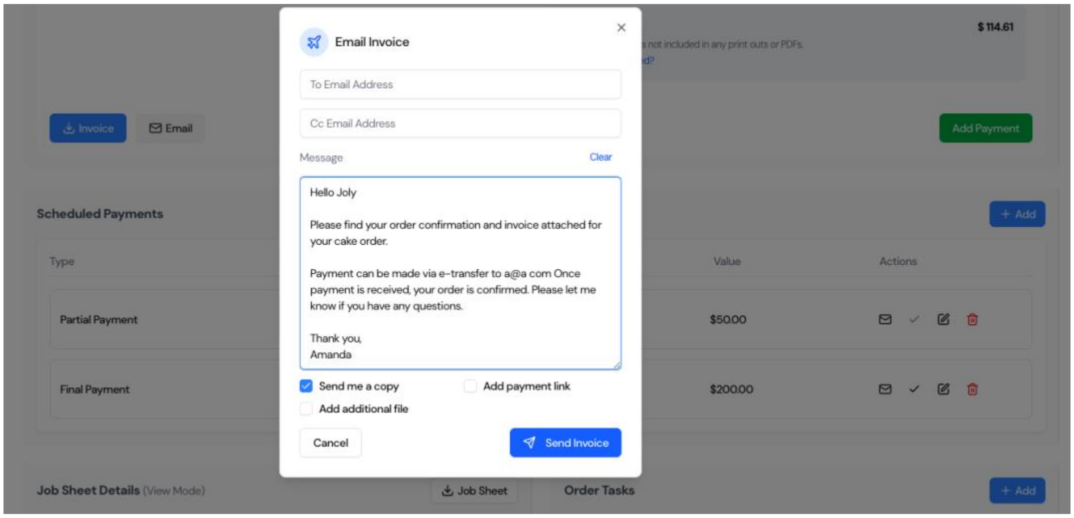
4 -**Send**

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

Professional, flexible invoice delivery!

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





Payment Integration:

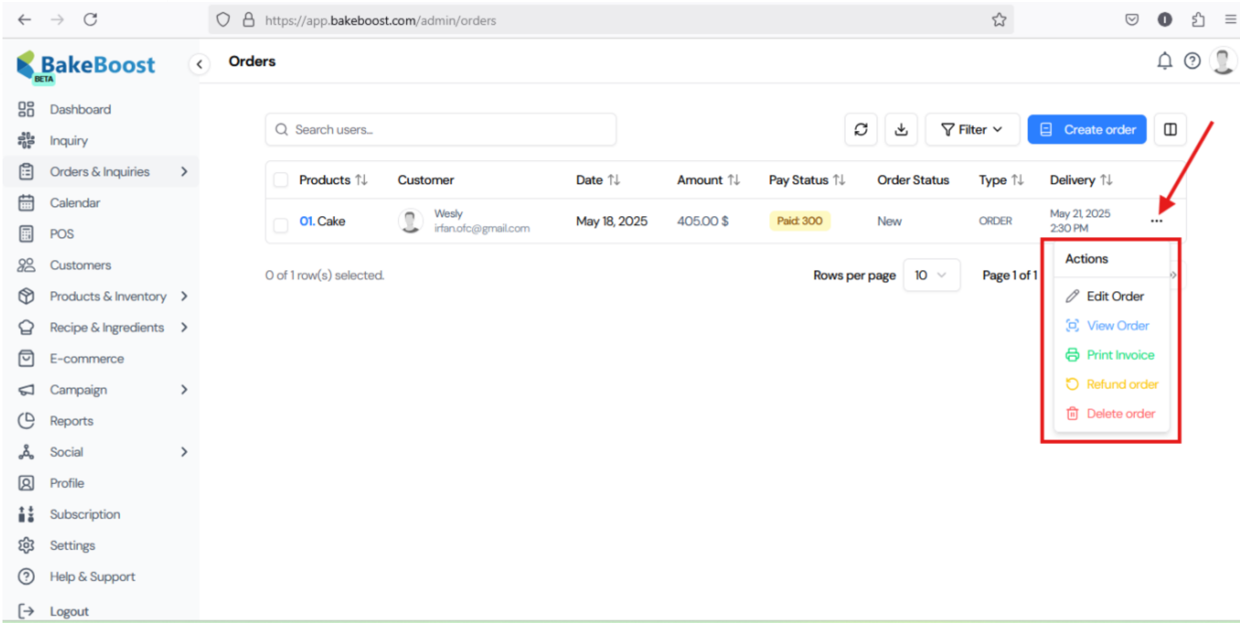
This is still in development for Stripe and Square

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

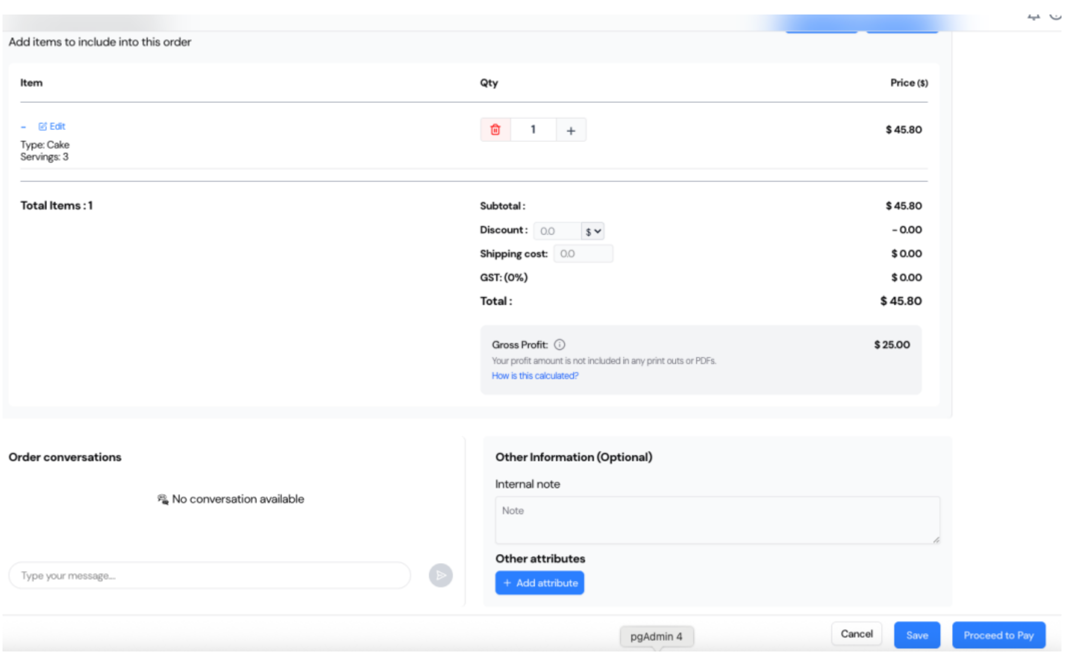
Manage all orders with just one click!



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

Edit Order:

In the edit functionality, you can make record payments



Click on proceed to pay:

Payment Processing

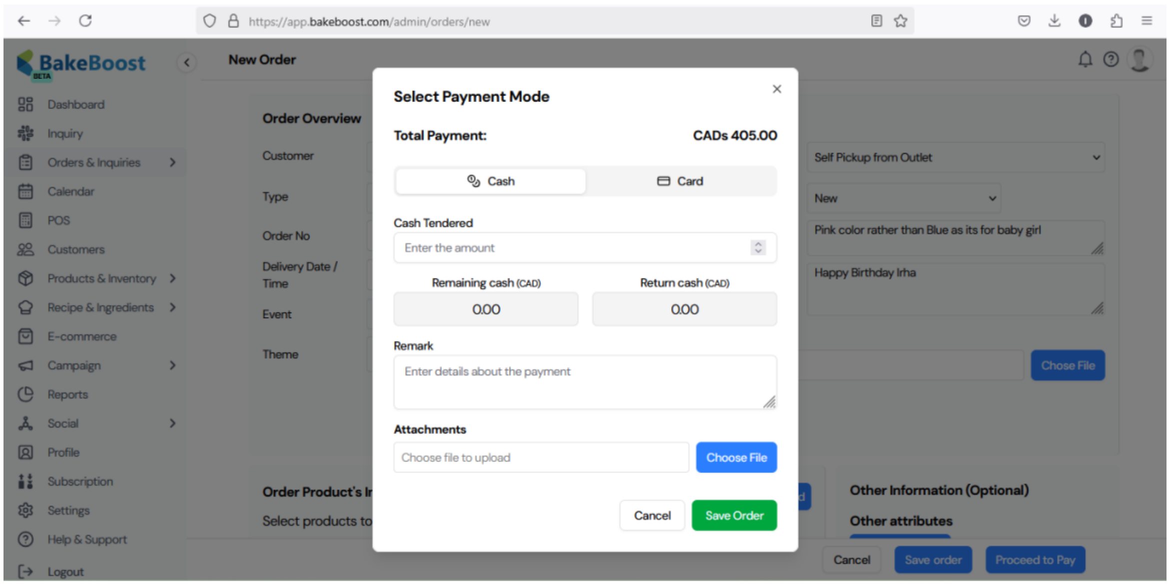
When you click **"Proceed to Pay"**, you'll see:

• **Cash** or **Card** payment options

• **Online payment** integrations (set in Settings)

• **Partial payments** accepted (remaining balance shown)

Flexible payment solutions for every customer!



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

Invoice Preview & Actions

When printing invoices, you'll see:

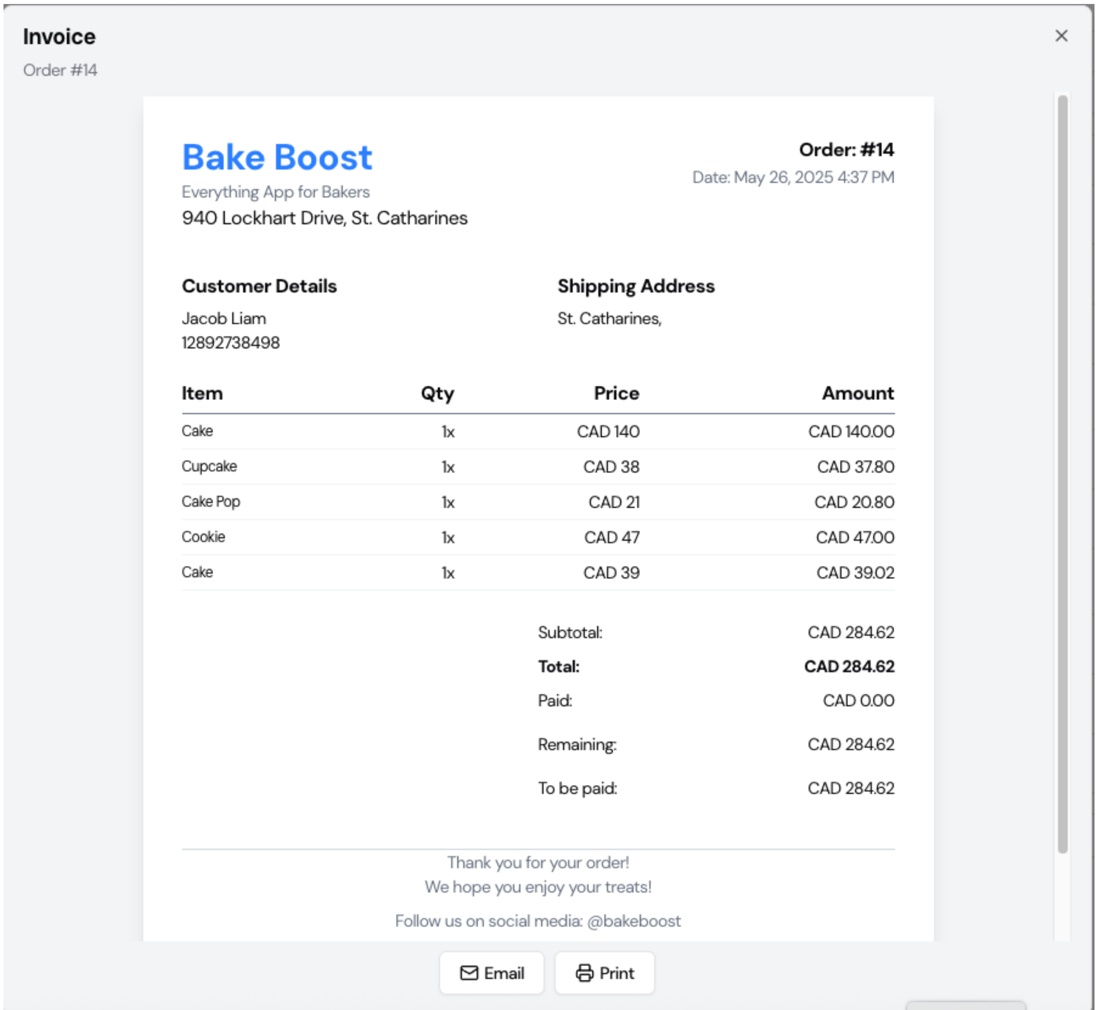
• **Full order details** (customer info, payments, discounts)

• **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

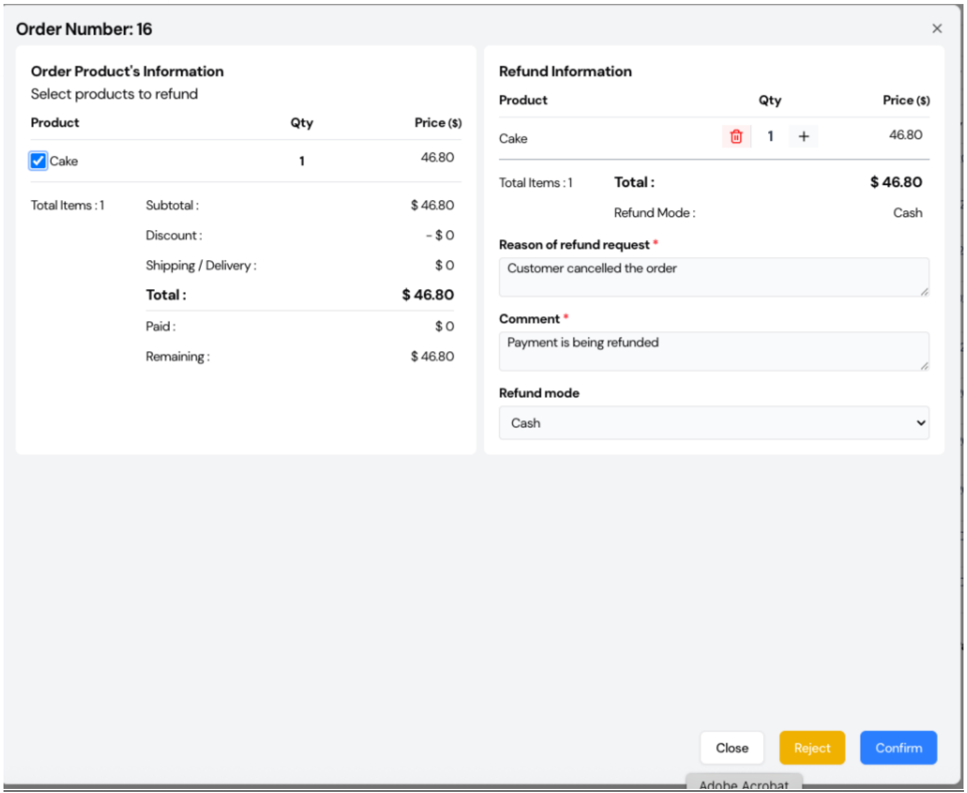
Subtotal:	CAD 284.62
Total:	**CAD 284.62**
Paid:	CAD 0.00
Remaining:	CAD 284.62
To be paid:	CAD 284.62

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 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**

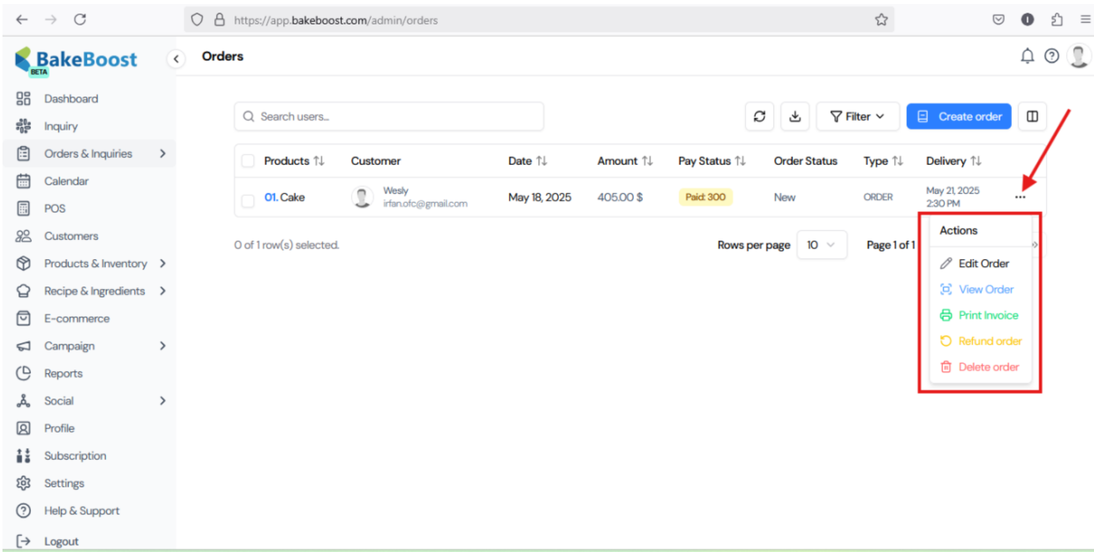
✓ **Streamlined workflow**

"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:

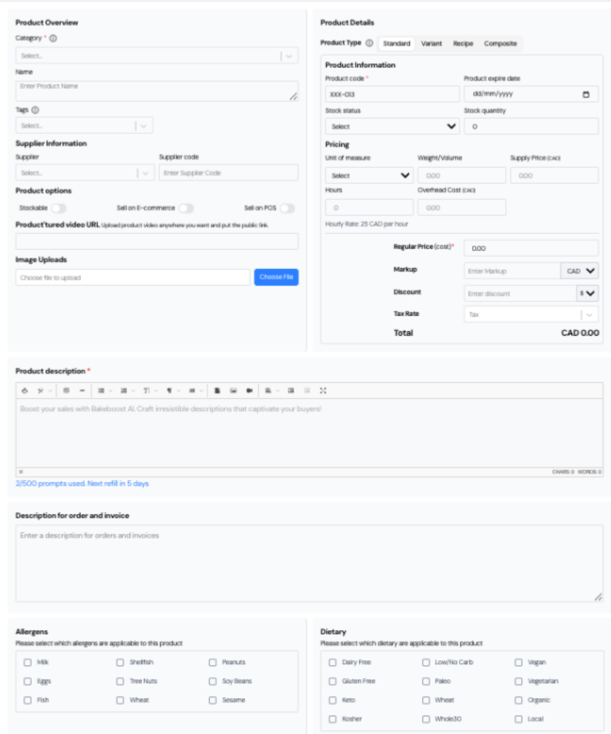
This product is made up of specified quantities of one or more other products. A composite product is a single SKU, but it consumes the inventory of the individual products used to make it (ingredients or bundled items).

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.	• 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.	• 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.	• 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).	• Combines multiple products • Single SKU • Tracks inventory of components	Rainbow Cake + Cupcakes Party Pack



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).

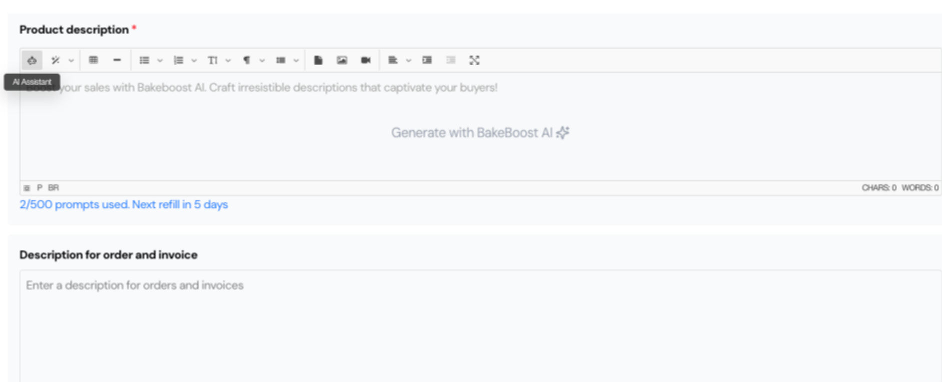
- Total :

Automatically calculated total based on the above inputs.

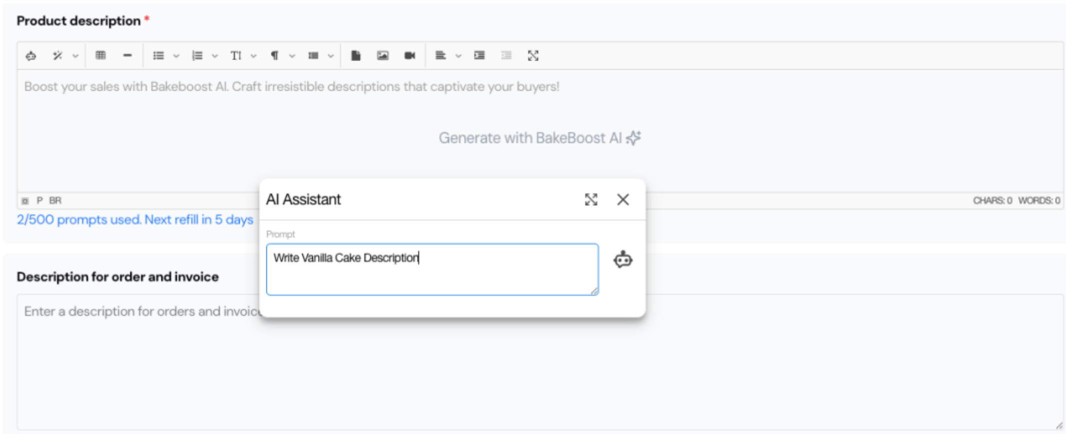
Product Description Section

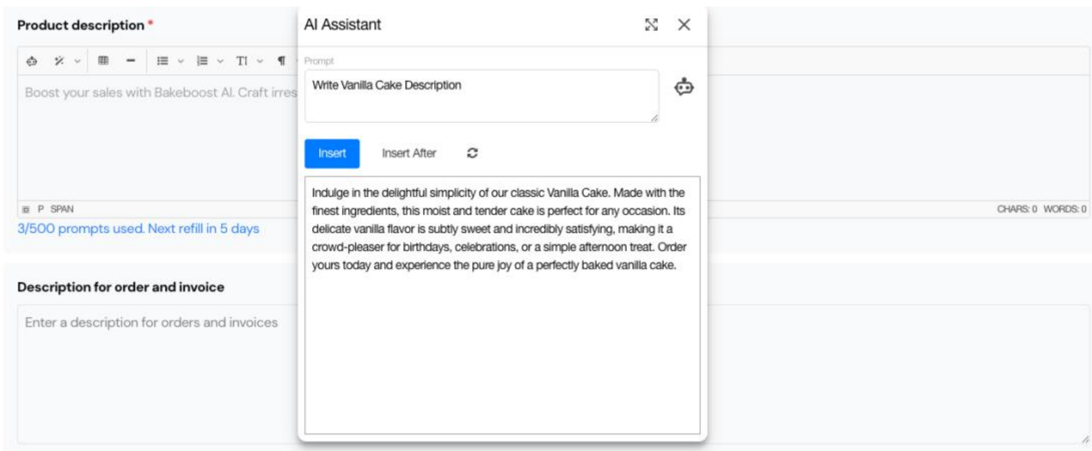
- Product Description:

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



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





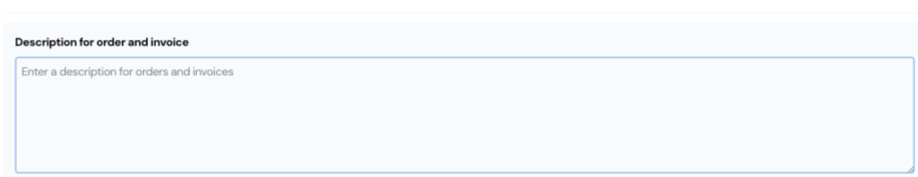
- Word Limit Indicator:

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

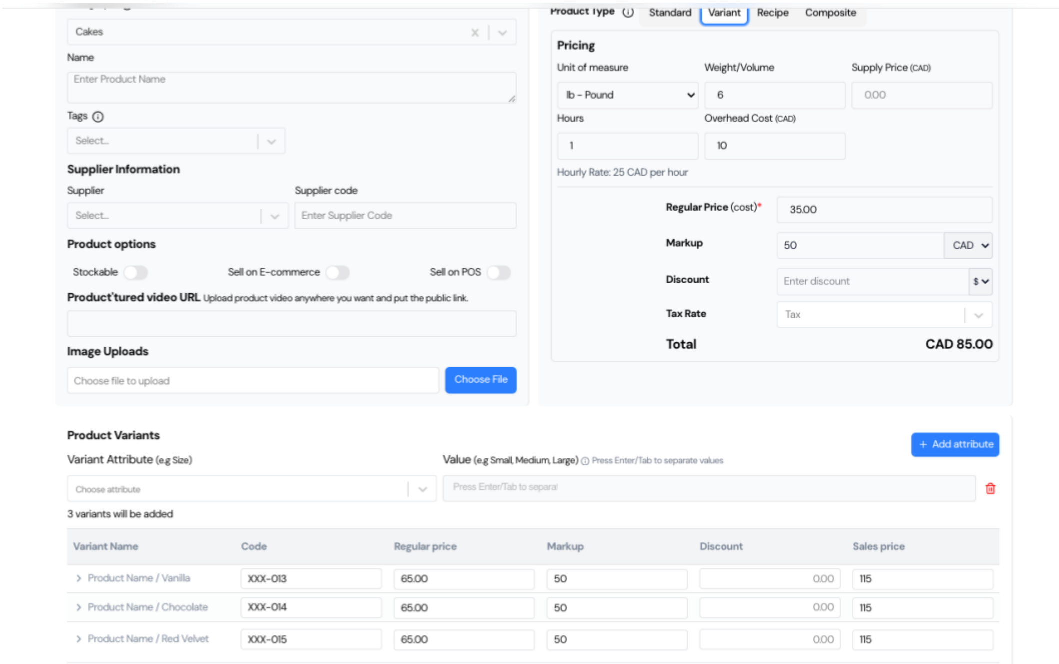
1. Select 'Variant' as Product Type

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



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

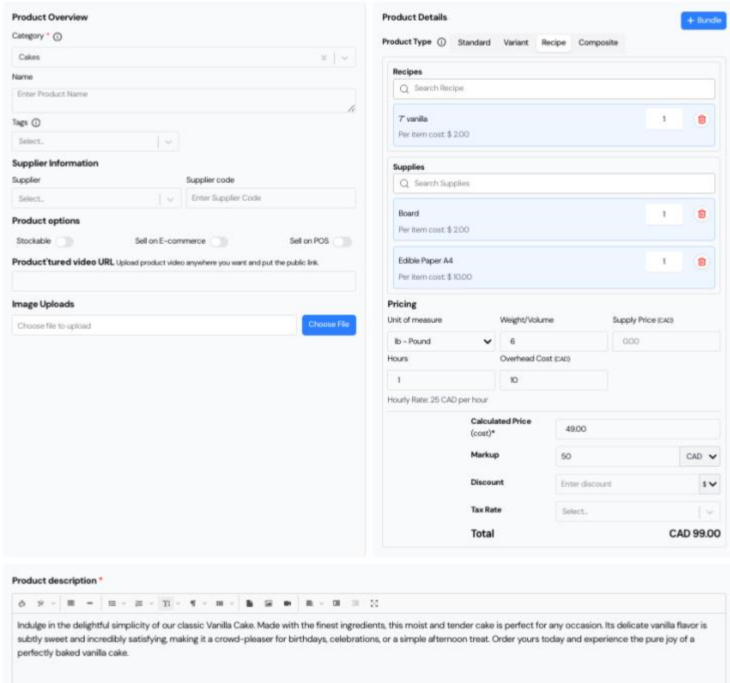
- Easier product management for similar items
- Independent inventory tracking per variation
- Customer-friendly selection experience in your store
- More accurate profit calculations per product

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



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.

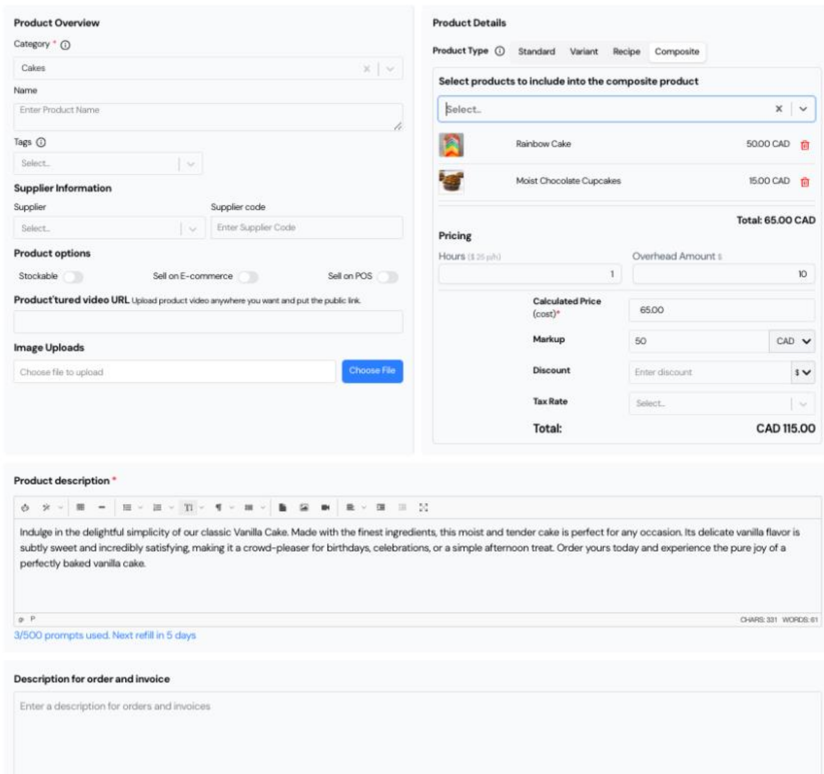
3. Add Overhead and Pricing

- 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



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?

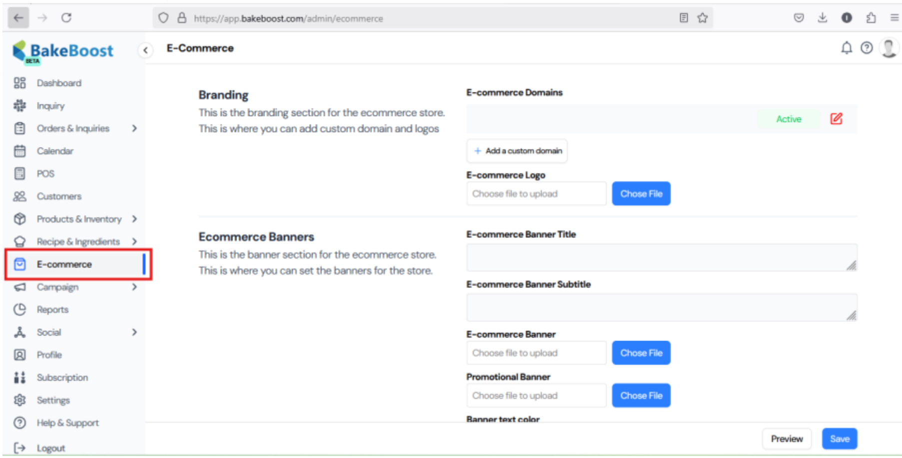
If you don't have an existing website or domain, BakeBoost lets you:
✅ **Create & activate** a custom domain instantly (e.g., *YourBakery.com*)
✅ **Skip technical hassles**—no need for separate hosting
✅ **Launch faster** with built-in SSL security

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!" 🏠🎂



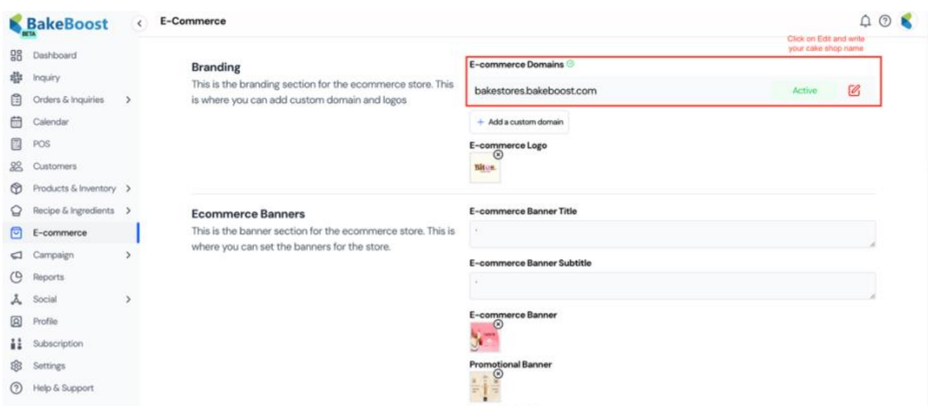
Click on the edit

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

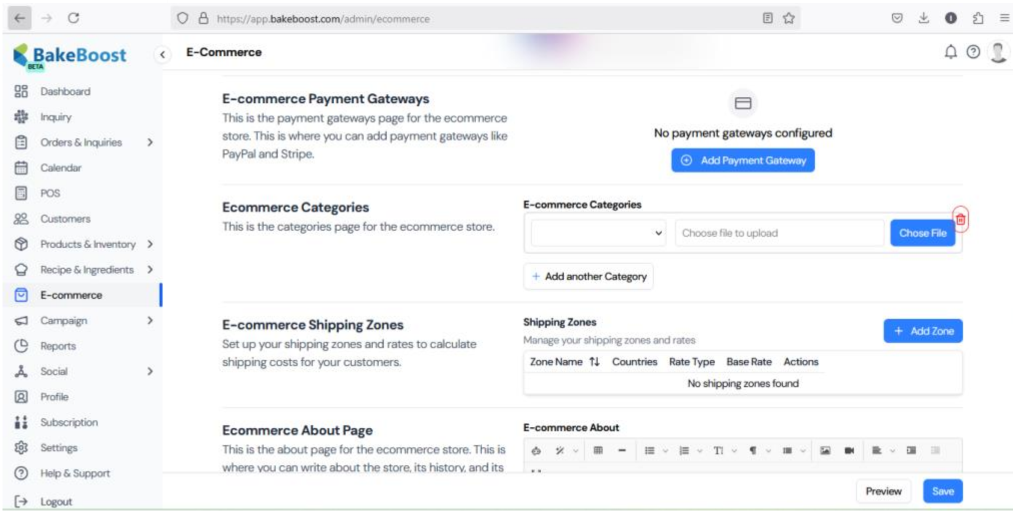
- Set **zones** by country/region
- Configure **rates** (flat, weight-based, etc.)
- *No zones added yet* (start by clicking "+")

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!"

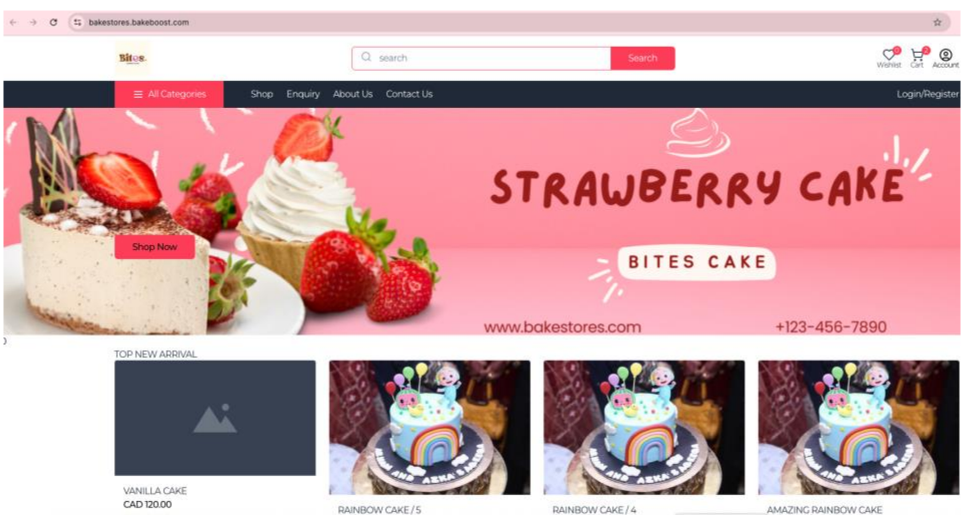


Now you can access your online store based on the name you have provided above while editing it

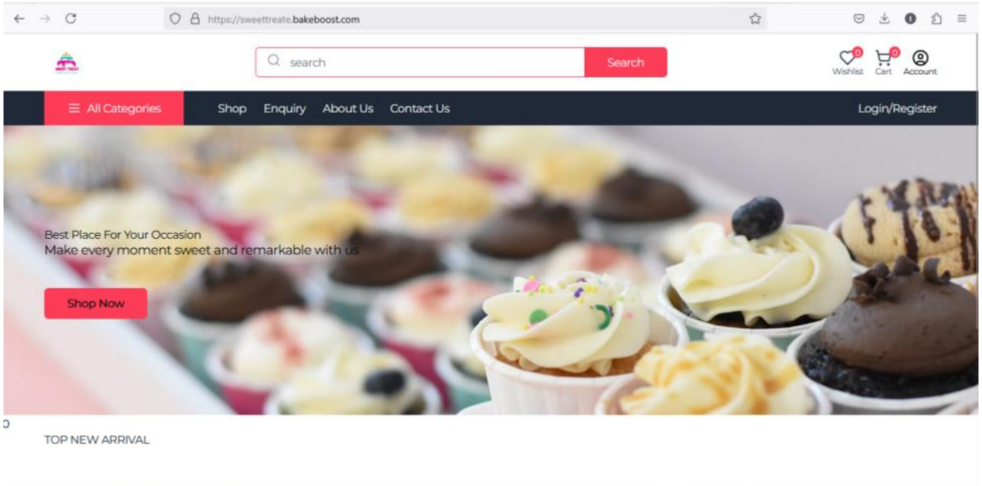
<cakeshopname>.bakeboost.com

Below example is

Bakestores.bakeboost.com



This example is stweetreat.bakeboost.com

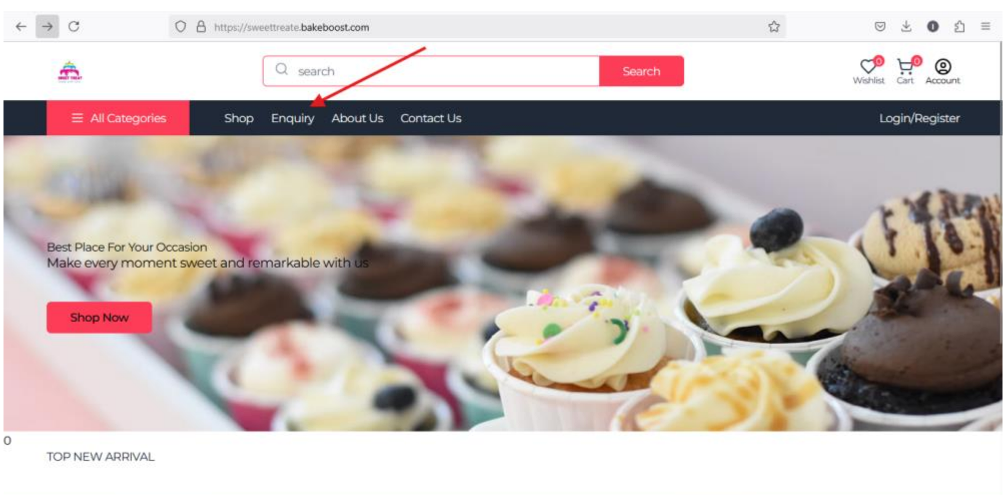


Custom Inquiry Form:

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

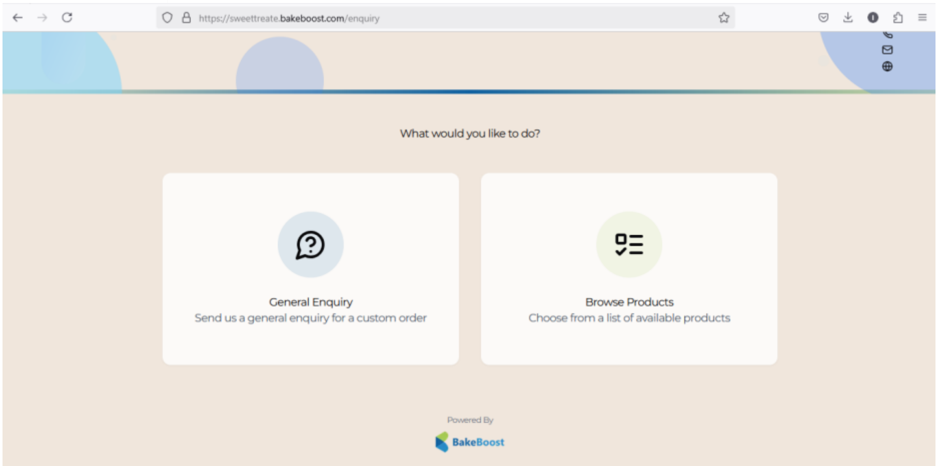
Start capturing leads effortlessly!



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!

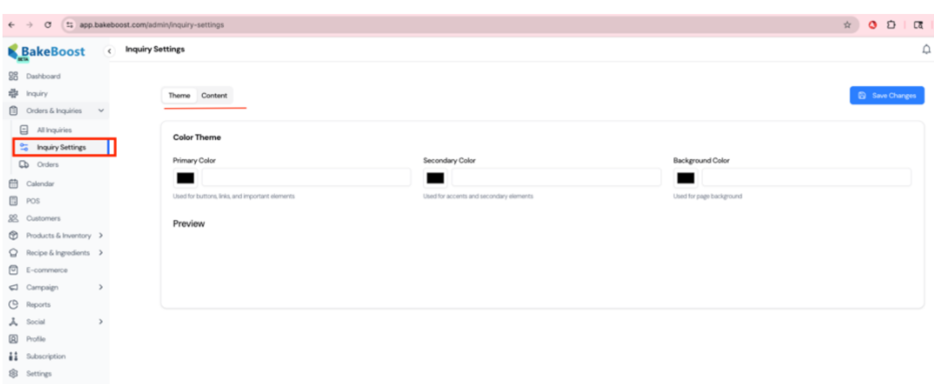
Key Features:

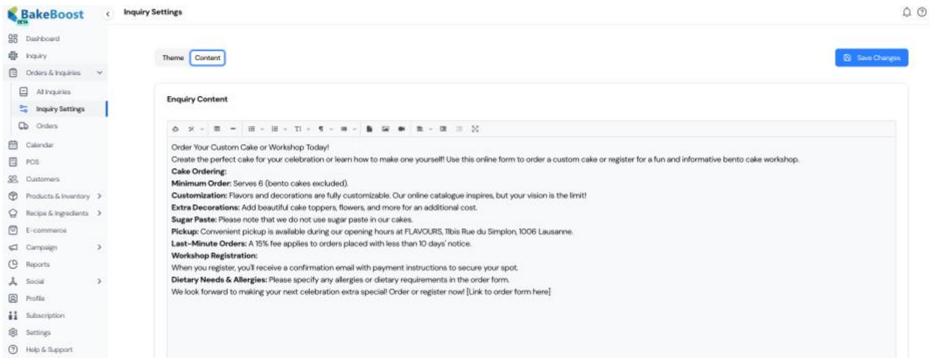
- Required fields are marked clearly
- Logical flow from contact to order specifics

"Turn inquiries into orders faster than ever!

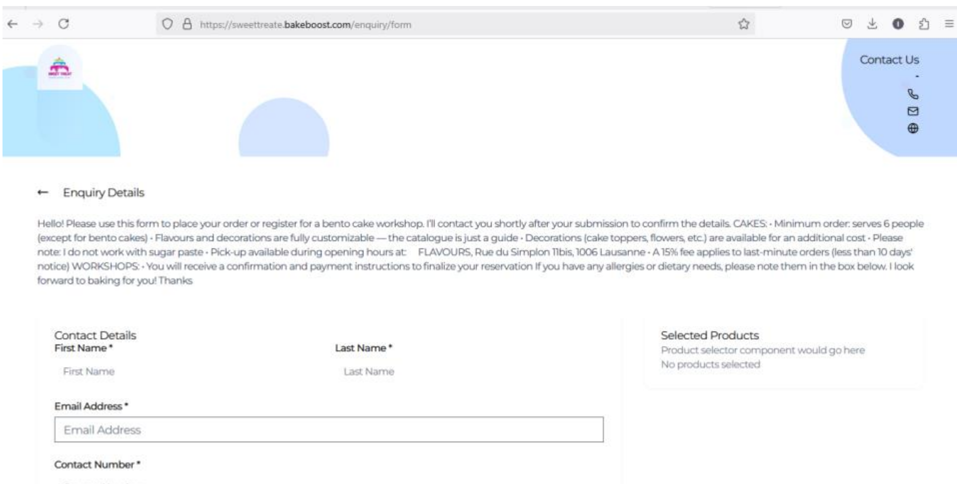
Settings of Enquiry form:

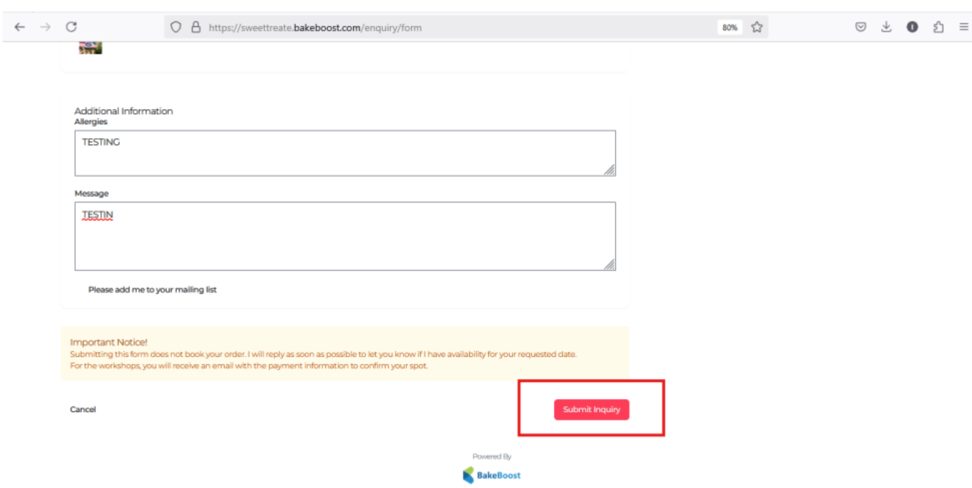
You can color the theme as per your color scheme, and update the content from the Inquiry settings



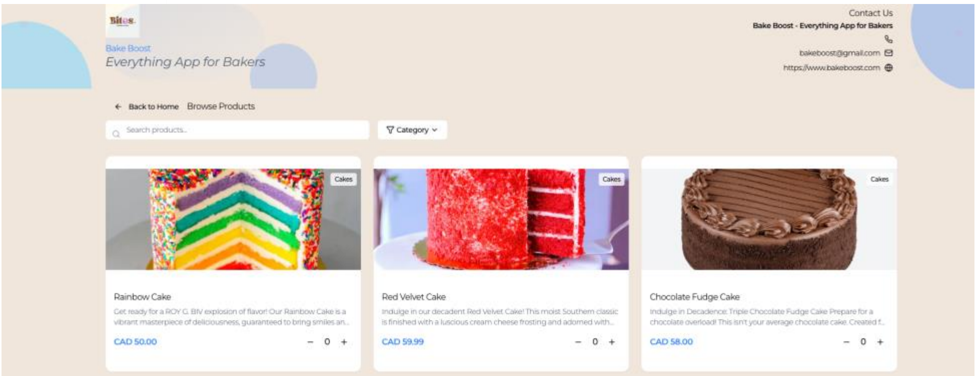


The Enquiry form:

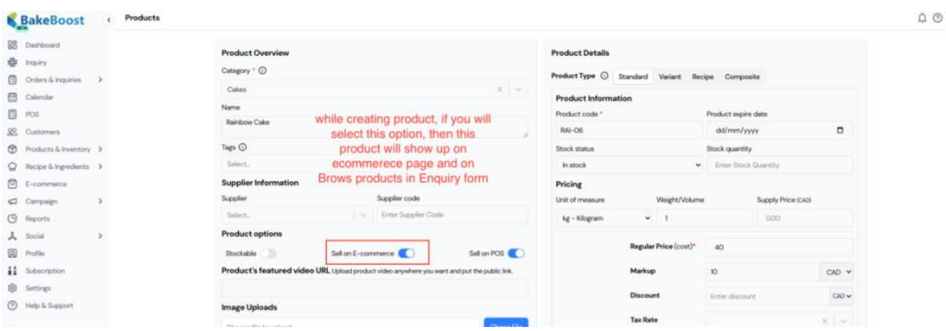




Browse products:



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

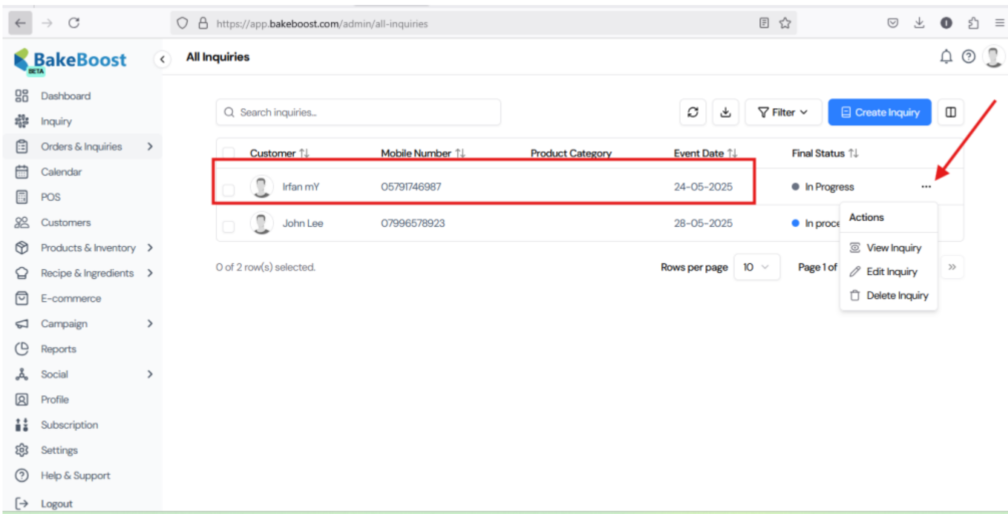
- Seamlessly convert inquiries to orders
- Track follow-up status (Pending/Processed)

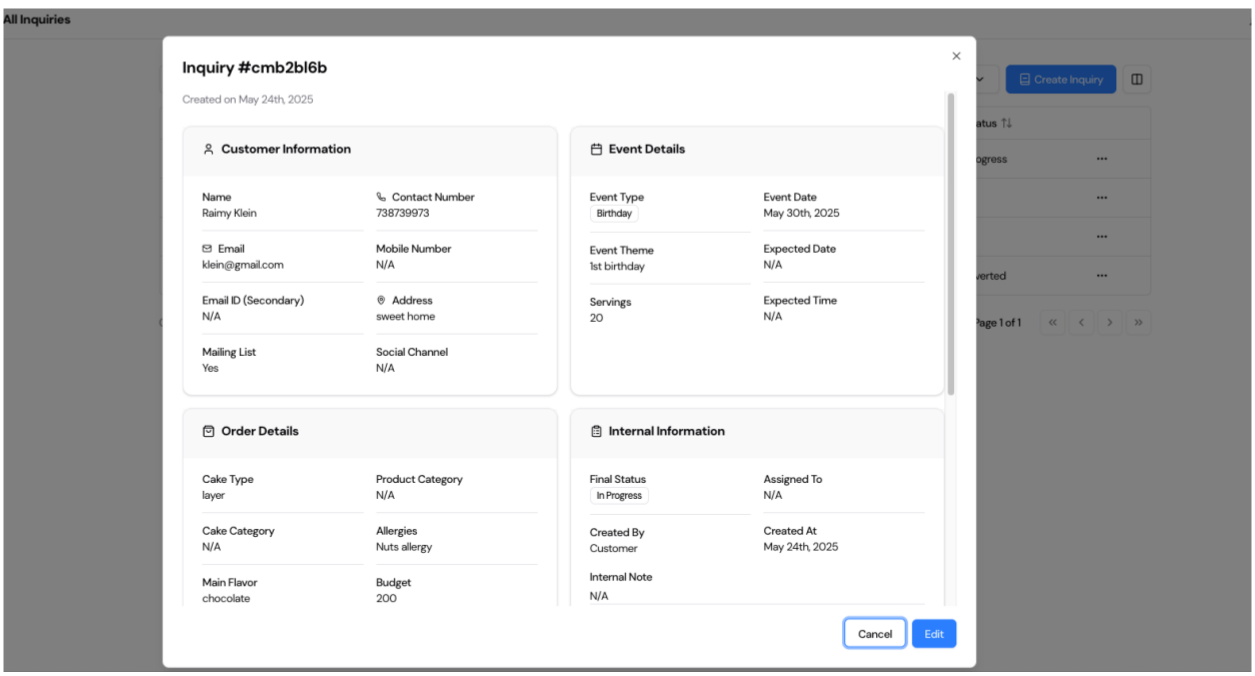
Example Inquiry View:

🔷 Customer: irfanmy

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

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

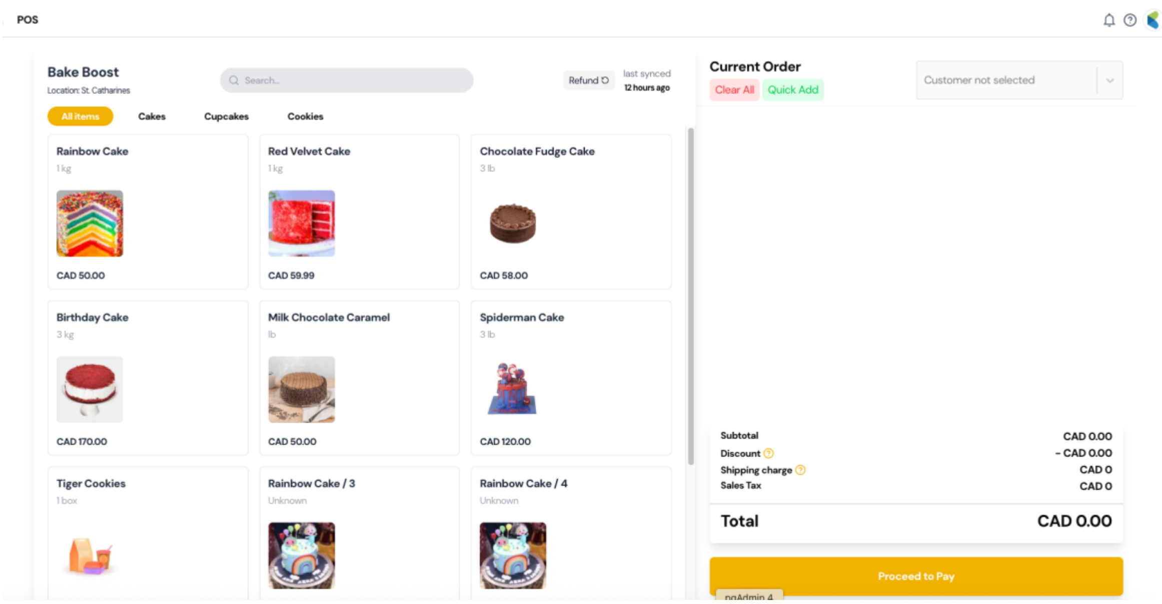




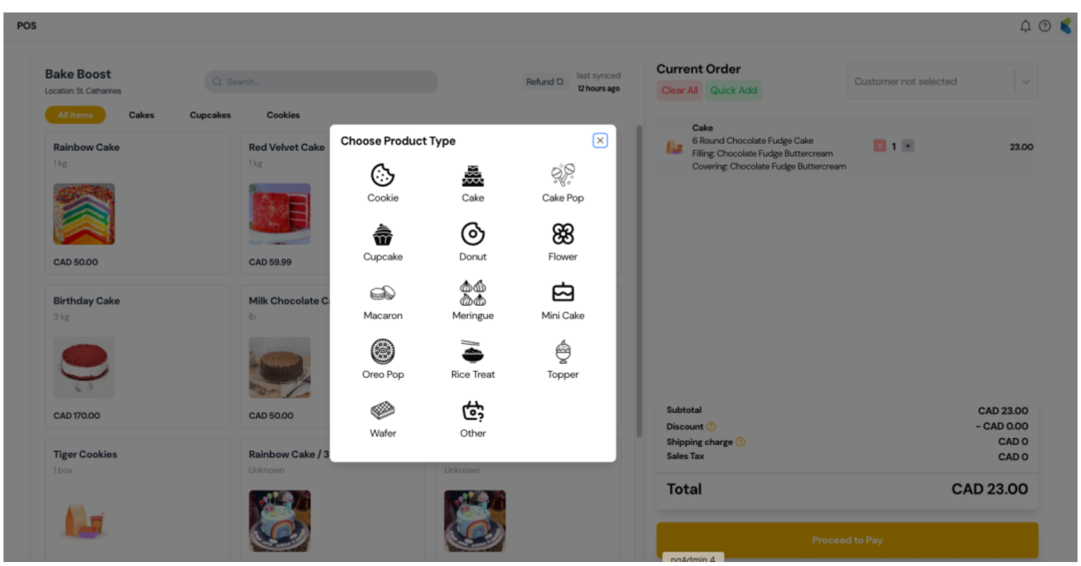
Point of Sale (POS)

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.

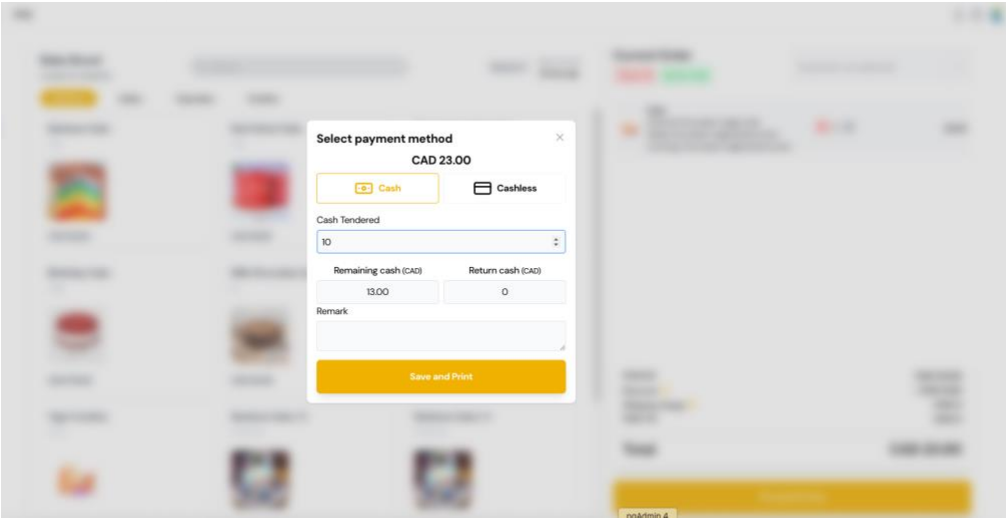
By integrating workflow automation with point-of-sale functionalities, bakers can ensure smooth transactions, better inventory management, and faster service, all vital for running a thriving bakery business.



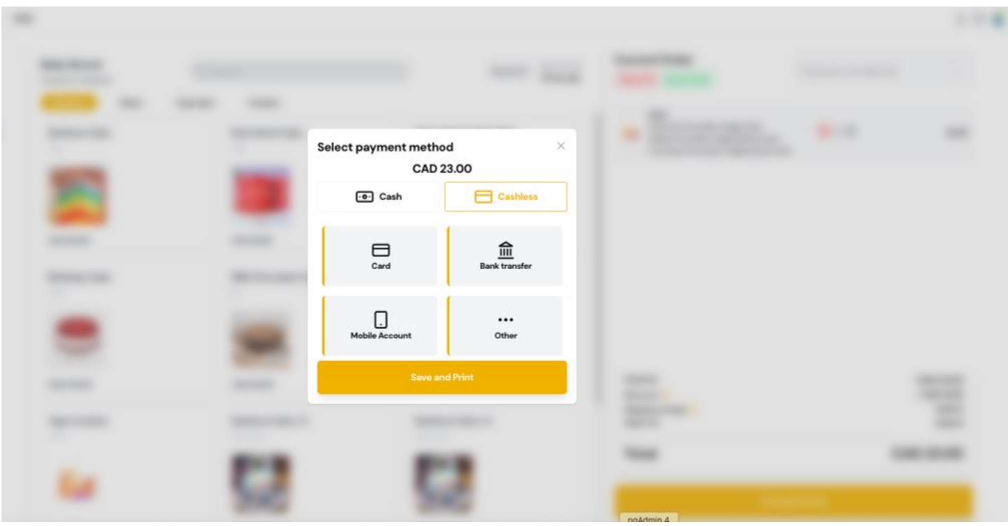
You can also add Quick add on the point of sale:

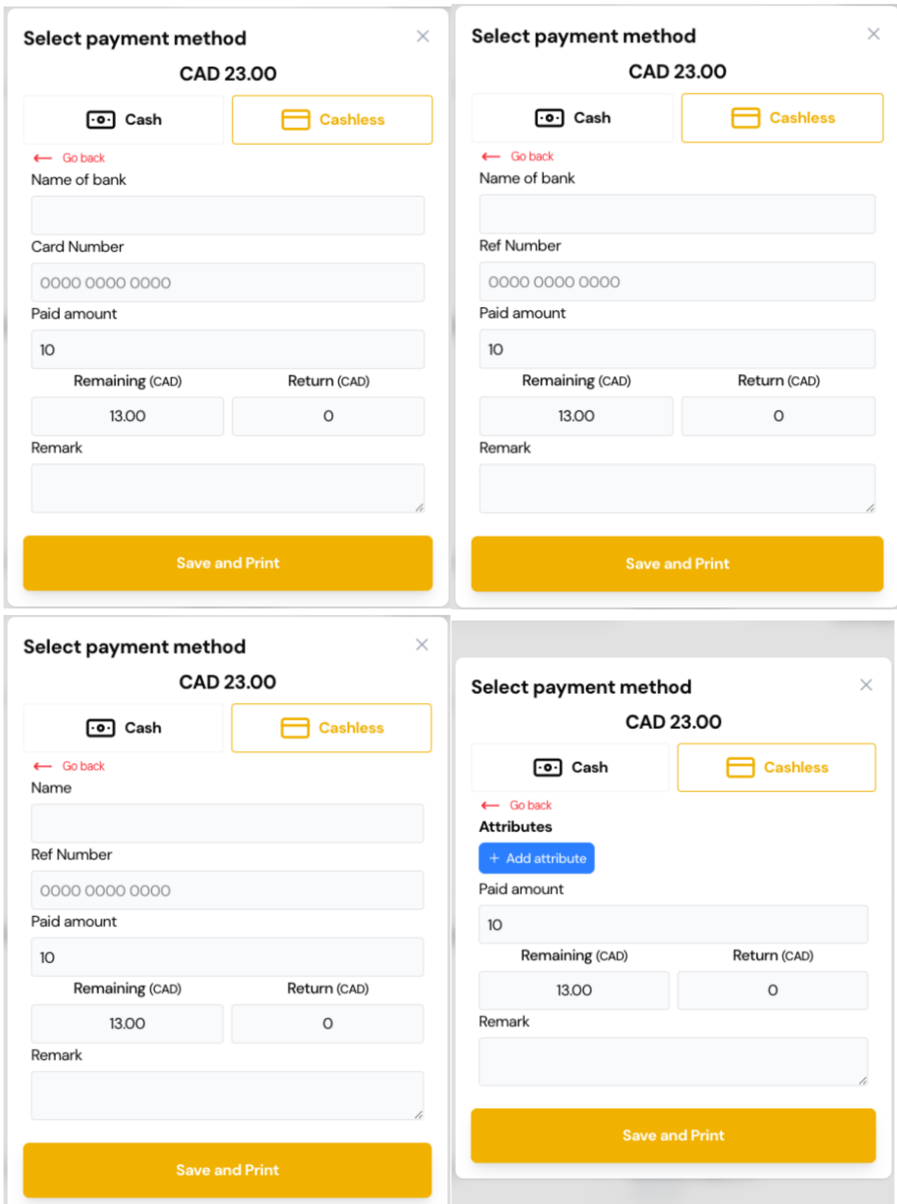


You can also select a customer if you know the customer is coming to the outlet to shop

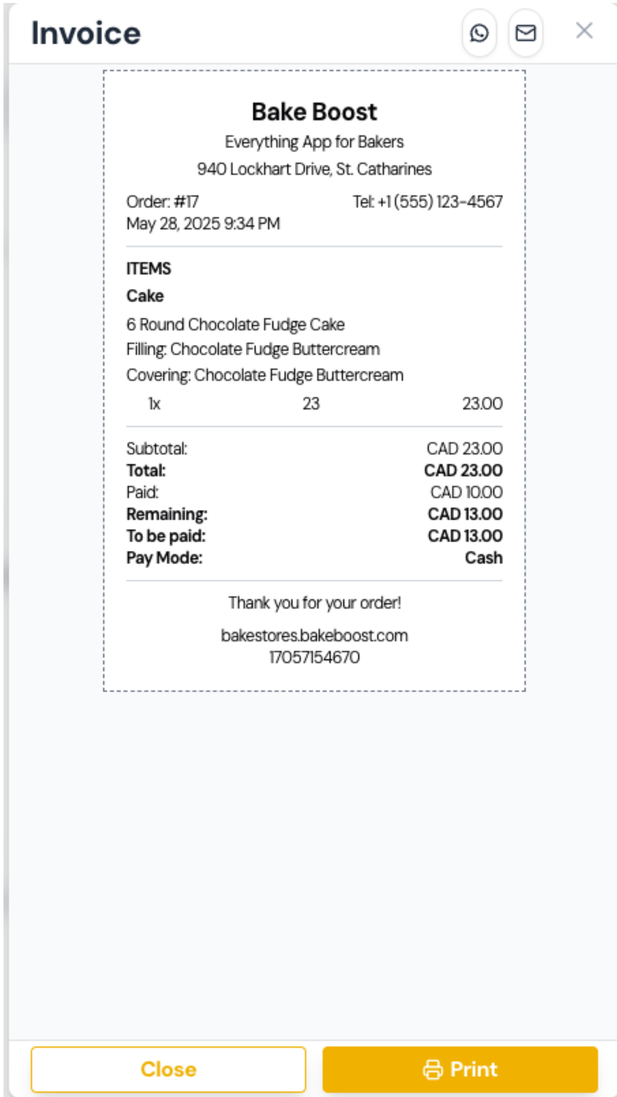


You can record the mode of payment from different sources:





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



Campaign / Marketing:

Using the Campaign Management Feature

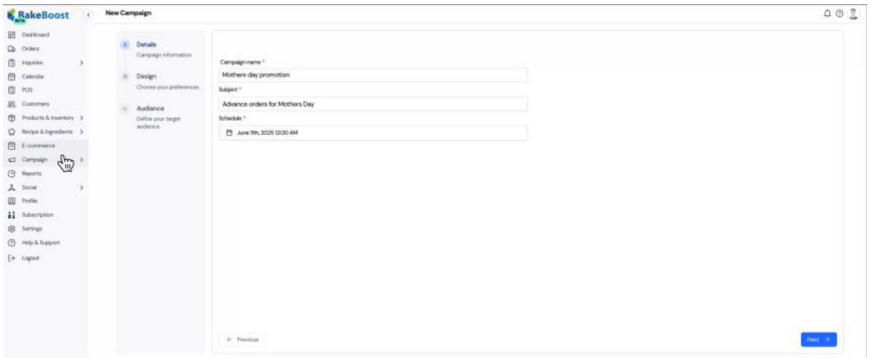
The Campaign Management feature allows bakers to easily create, manage, and promote special campaigns (e.g., for holidays, events, or new product launches) to attract customers and boost sales.

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

Example in this guide: Mother's Day Campaign

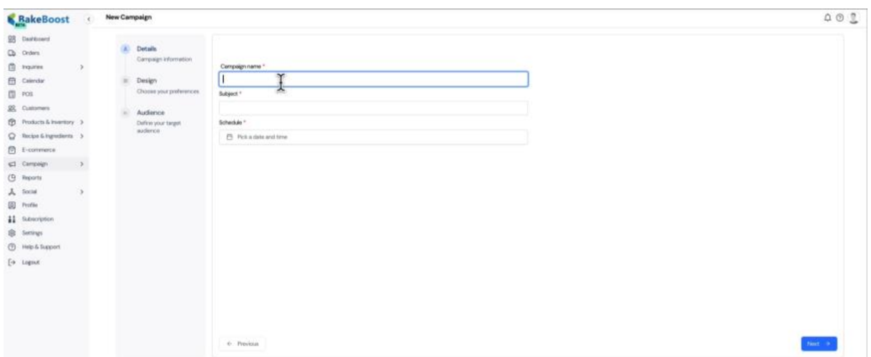
1. Access Campaign Management

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



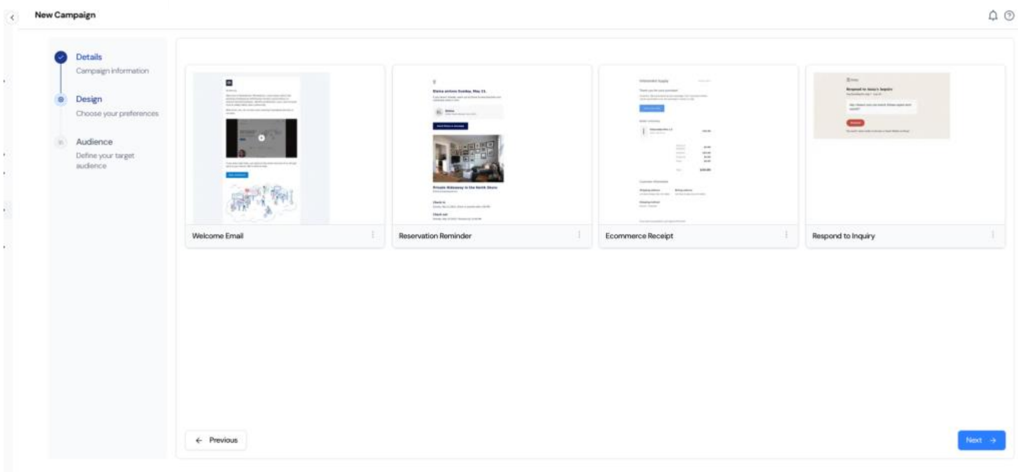
2. Create a New Campaign

'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.

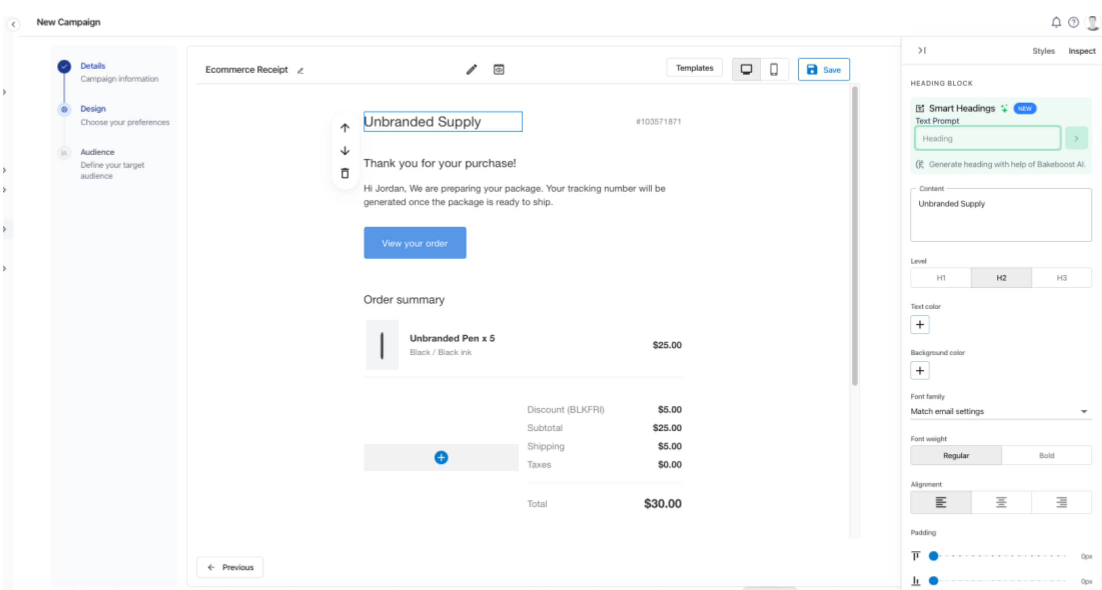


4. Customize Campaign Content

Edit campaign content:

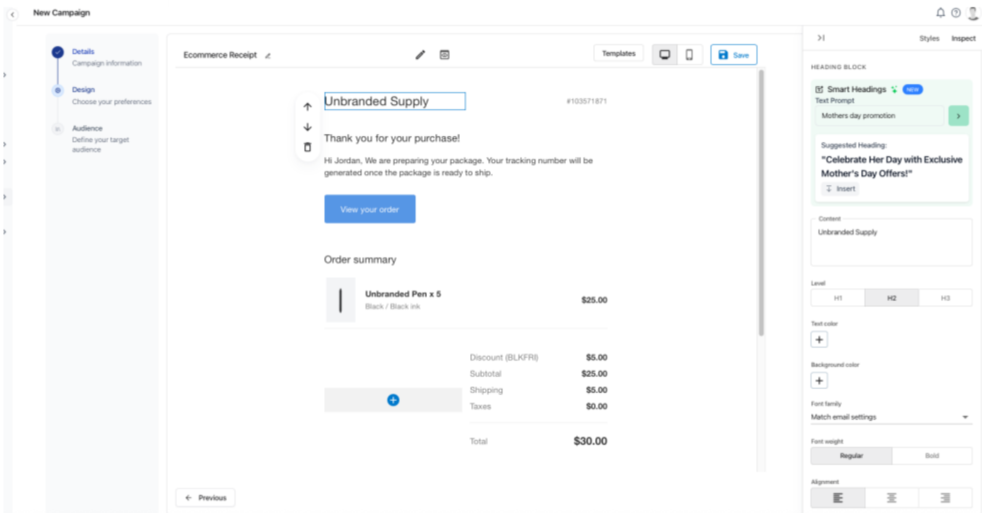
- Headline
- Description
- Promo Code (optional)
- Campaign Image

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

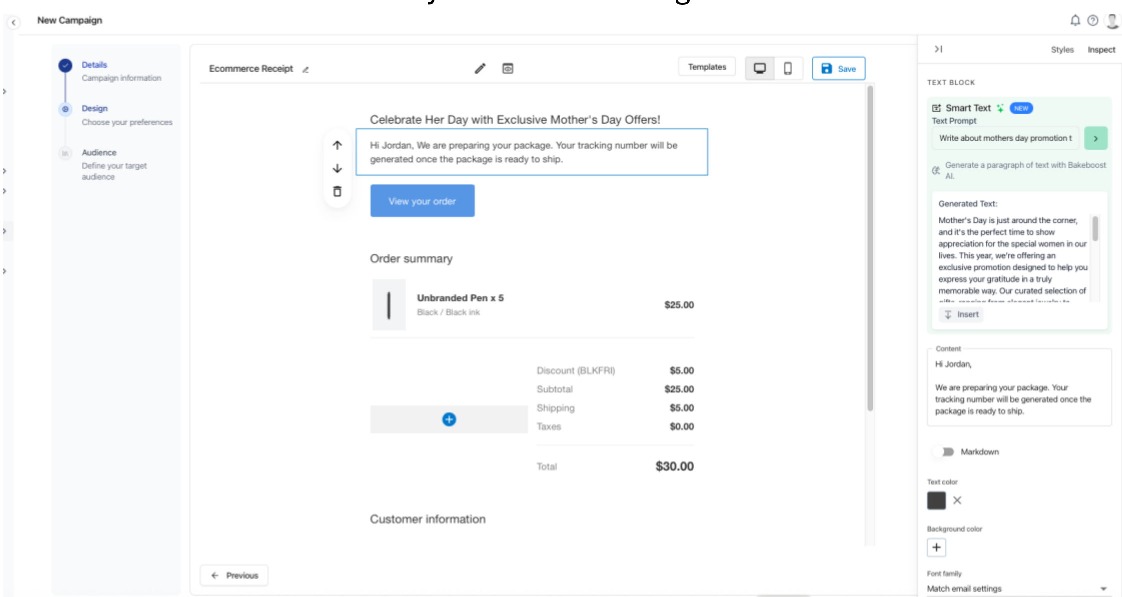


Example Prompt:
"Mother's Day Promotion"

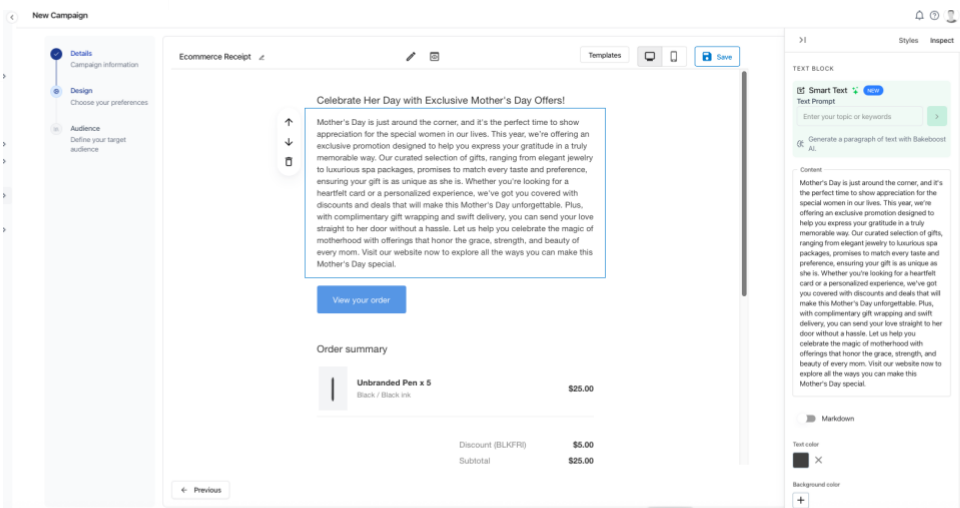
The AI responded with the suggested heading: **"Celebrate Her Day with Exclusive Mother's Day Offers!"**"



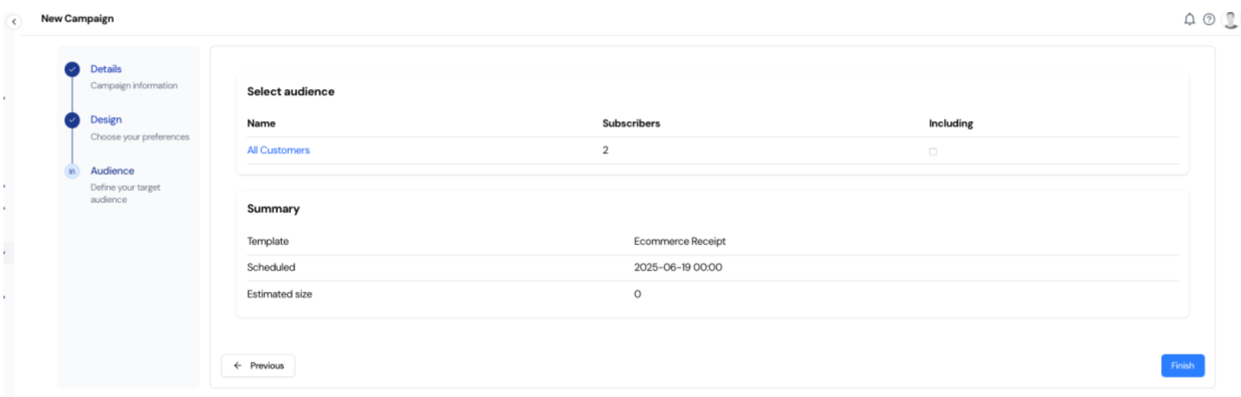
You can now also write the body of the email using the AI.



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

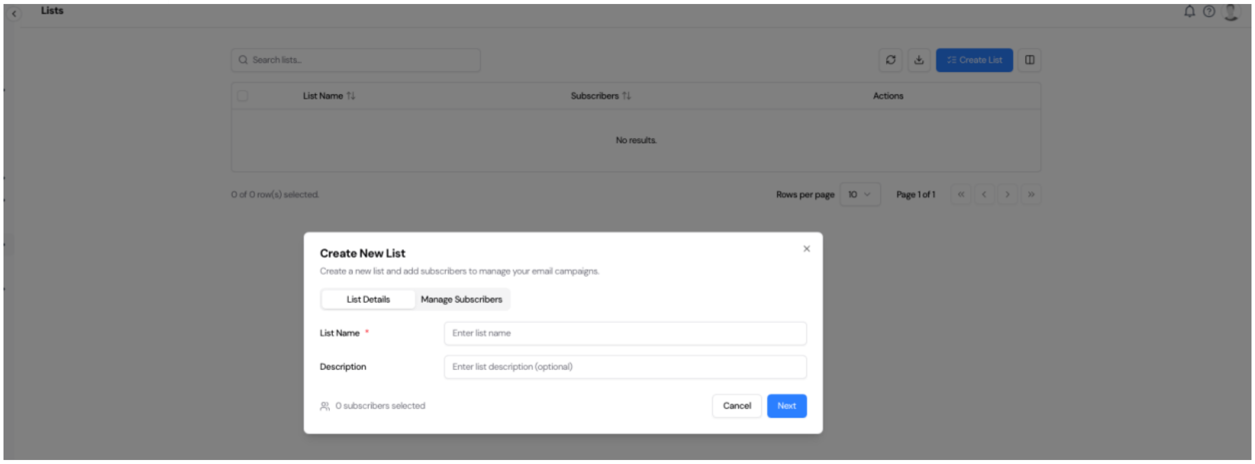
✓ Attractive campaigns for special occasions

✓ Performance tracking

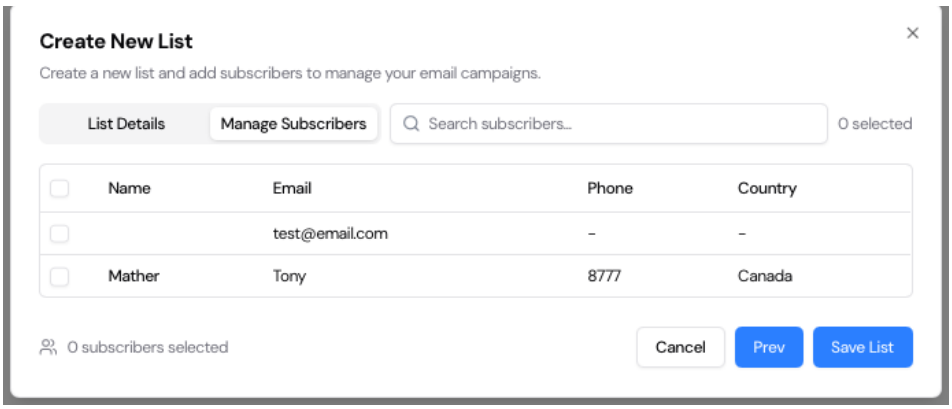
✓ Helps bakers boost sales & customer engagement

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:

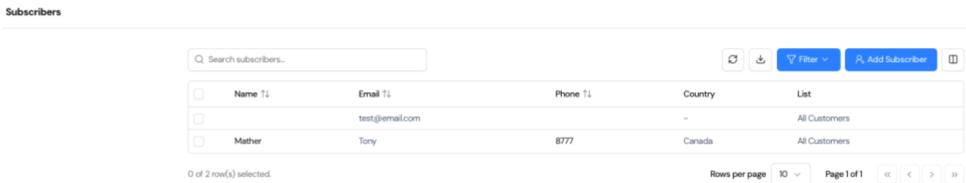


Subscriber:

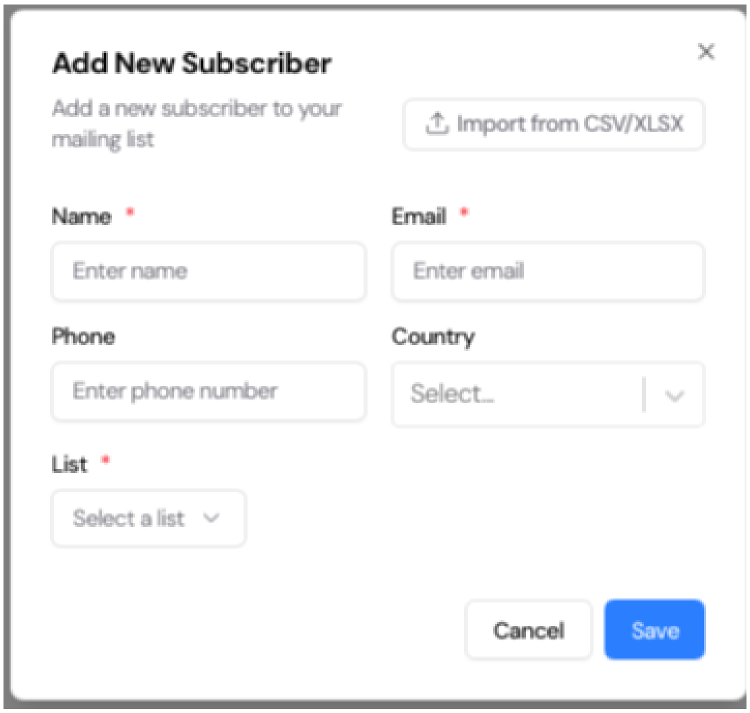
Subscribers are the cornerstone of your email campaigns. Every customer contact has the potential to become a subscriber, creating a seamless bridge between your business and your audience.

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.



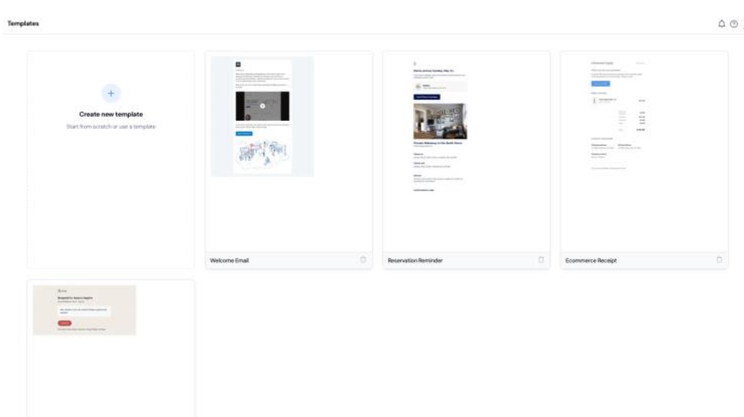
Addition of contacts as subscriber:



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: