Tutorial

(You may find it helpful to print this tutorial. There is a shortcut to a PDF version for printing, called **Able Baker Tutorial**, in the Able Baker group on the **Start** menu.)

In this tutorial, you will use example data supplied with Able Baker to experiment with some of it's functions. The example files will be opened automatically the first time your run the program. (Otherwise see Options: Data Folder to open them.)
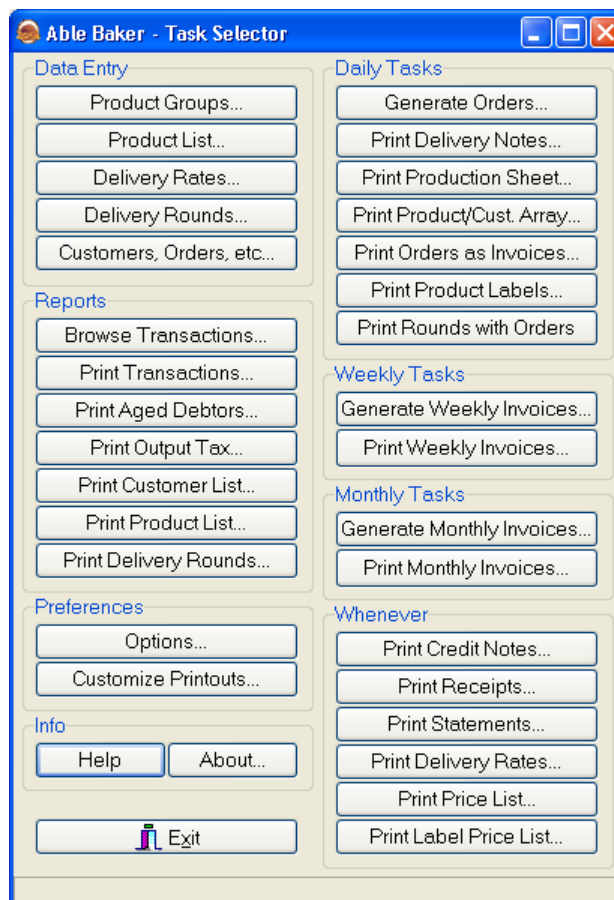
The Task Selector

Start Able Baker.

If the "About Able Baker" box appears, click [OK] to by-pass it, and wait for the Task Selector to appear.

The Task Selector is the central control panel for *Able Baker*. Most activities are started by clicking a button on the Task Selector to open a new window. At the end of the activity, the new window is closed and you return to the Task Selector.

A New Order

Suppose you've just received a new order for an existing customer - that's information, or data, you need to enter into the system.

On the Task Selector, locate the group of buttons headed *Data Entry*. Click
Customers, Orders, etc... and the Customers Orders, etc window will open.

Down the left-hand side of the window is a list of customers: there are three columns - customer reference, name, and delivery round - though they may not all be visible.

You can alter the width of the list on the screen by hovering the mouse pointer over the right-hand edge of the list until it looks like this: ◄▌►. If you left-click now, you can drag the line that splits the two sections of the form to make more or less room for the list. In a similar way, you can change the width of the columns in the list, by clicking and dragging between the column headings. This ability to resize panels and columns is common to most areas of the program.

The customer with the new order is "The Golden Duck Hotel". This should be easy to find in our short **Customer List**. Click on the appropriate customer in the list, and the information in the right-hand side of the window will change to that of the selected customer - you can verify this by looking at the topmost area where you can see the **Account Ref** and **Customer Name** for the selected customer. These should now read "GDH" and "The Golden Duck Hotel" respectively.

There is a lot of information available in this window. The top section has three tabs showing details about the customer...

Contact, Rounds & Discounts | Address(es) | Labelling & Notes

Contact Names
Jack Bentley

Telephone Numbers
Tel 1: 020 222 2222
Tel 2:
Fax:

Delivery Round
Number: 2
Position: 1
Rounds Editor... | Customised Price List...
Delivery Rates: Out of Town 1

Email: jack@thegoldenduck.c | Invoice Freq.: Weekly | Prices: Price List 6 | Discount: 0.00%

The lower section has seven tabs, each recording a different type of transaction between you and the customer - not all of them will apply to all customers...

Permanent Orders | Actual Orders | Weekly Invoices | Monthly Invoices | Credit Notes | Receipts | Account

Order Day	Comment	Active	Price (excl)		Duplicate selected permanent order

What we need now is the **Actual Orders** tab. Click and it will come to the front.

Permanent Orders | Actual Orders | Weekly Invoices | Monthly Invoices | Credit Notes | Receipts | Account

New from selected... | New from Permanent... | Print Delivery Note... | Labels... | Order as Invoice...

Order#	Date	As invoice	Cleared	Comment	Printed	Nett Price	% Disc	Price	De
38662	15/06/2007				☑	£30.20	0	£30.20	

For the object of this exercise, what Jack at *The Golden Duck Hotel* has asked for is, "The same as last time, plus 10 iced buns and 10 chelsea buns." So we can start by duplicating the last order for that customer as the basis of a new one.

The last order may already be selected, but if it is not, click on the row that starts with "38662" - the reference number of the last order for this customer. You can see that order was for the date 15/06/07. In the bottom section of the window, you can see the items that comprised that order, starting with 4 large wholemeal sliced loaves.

Now click New from selected... . A calendar will appear showing today's date, with tomorrow's date marked for selection.

Select Date for New Order

| June 2007 | OK | Cancel |

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Today: 26/06/2007

(If tomorrow is a Sunday, for the sake of this example please select the following day, as the example data is for a bakery which does not take Sunday orders)

Accept the highlighted date by clicking OK . A new order will be created
containing the same items as the last - you can verify this by looking at the new
Order # and **Date** entries at the end of the list of orders.

Now to add the iced buns.

Beneath the list of **Actual Order Items** you'll see a navigator bar, looking
something like this:-

There are three similar devices in the window, so make sure you have
identified the bottom one, beneath the list of order items - to check, leave
the mouse pointer over the ＋ button for a moment and the hint
"Add item" should appear...
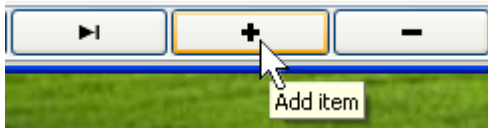
Click the "Add Item" button and an empty line will be added to the end of
the **Actual Order Items** list.

Double-click in the **Product Code** column and the **Product Selector**
window will appear.

The list of products in the example
database is short and you may already
be able to see "Iced Bun" near the
bottom.

However, click in the **Find** box at the top
of the window and type "i" for "iced bun".
The list will be reduced to show only
those items whose names match the text
in the box - in this case immediately
singling out "Iced Buns".
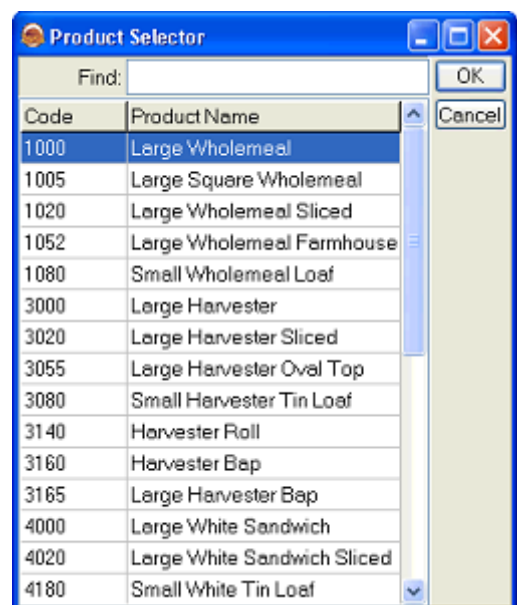
Press the Enter key or click OK - the **Product Selector** will close, and
the product code and other details for iced buns will appear in the
previously blank **Order Item** line.

The only information you need to add to complete the line is the number of buns required (10 in our example). So enter "10" in the **Units** column, and click the [✔] button beneath the list to save the information. Note that the position of the iced buns in the list may change, as the list is sorted in order or **Product Code**.

Tip: If the [✔] button is "grayed" like this - [✓] - then an entry has already been saved, so there is no need to click it.

Now repeat the steps from "Now to add the iced buns" above, but adding 10 Chelsea buns this time.

When you've finished, the **Actual Order Items** list should look like this...

Product Code	Product Name	Units	Unit Price	Disc. Price	Subtotal
1052	Large Wholemeal Farmhouse	4	£1.47	£1.47	£5.88
3055	Large Harvester Oval Top	4	£1.47	£1.47	£5.88
4020	Large White Sandwich Sliced	4	£1.40	£1.40	£5.60
4330	Crusty Round Roll	24	£0.29	£0.29	£6.96
6020	Iced Bun	10	£0.49	£0.49	£4.90
6040	Chelsea Bun	10	£0.60	£0.60	£6.00

Just before we leave this window, click on the **Permanent Orders** tab. For *The Golden Duck Hotel* this list is empty, but if you click on the next customer in the **Customer List** - *Pete's Place*, you'll see a Permanent Order for each day of the week, from Monday to Saturday.

Permanent Orders

Order Day	Comment	Active	Price (excl)
1-MON		☑	£32.47
2-TUE		☑	£32.47
3-WED		☑	£32.47
4-THU		☑	£36.67
5-FRI		☑	£32.47
6-SAT		☑	£7.00

Usually this customer requires the same order for any given day of the week. Each day, AbleBaker uses the corresponding Permanent Order to create an Actual Order for this customer - you'll see how this works shortly.

If you click on "ABC Food Store" in the **Customer List**, you'll see that this customer has Permanent Orders too, but just for Mondays, Wednesdays and Fridays.

Click [Close] to return to the Task Selector.

Daily Tasks - Generate Orders

Now it's time to make use of the **Permanent Orders** we have just been looking at. On the Task Selector, locate the **Daily Tasks** group, and click

[Generate Orders...]. A calendar appears with the prompt "Select date of orders to generate", and tomorrow's date highlighted in blue. (As before, if tomorrow

is a Sunday, please select the following day). Click [OK].

The **Permanent Order Selector** now appears, with the corresponding Permanent Order day already highlighted.
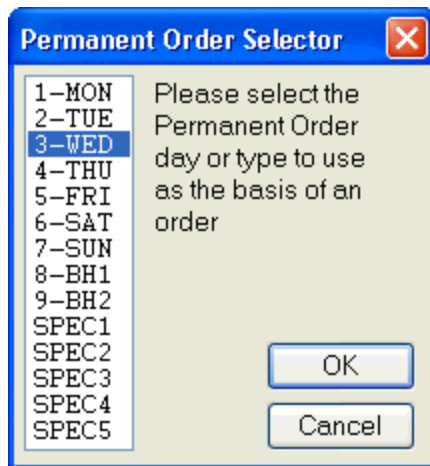
(Usually you will want to accept this setting. However, should it be useful to have permanent orders for Bank Holidays or other recurring special days, then this is where you would opt to use them in place of the "regular" orders.)

Click [OK] and the orders will be created.

Tip: The progress of creating orders is shown by an indicator at the bottom of the Task Selector; however in this instance it will probably be too quick to be noticed.

If for any reason you have already made an **Actual Order** for the selected date for a customer with an active **Permanent Order** for the selected date, you will be asked whether you want to over-write the existing order or not. You can see this in action if

you click [Generate Orders...] for a second time and select the same order date as before. The following dialog will appear...
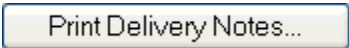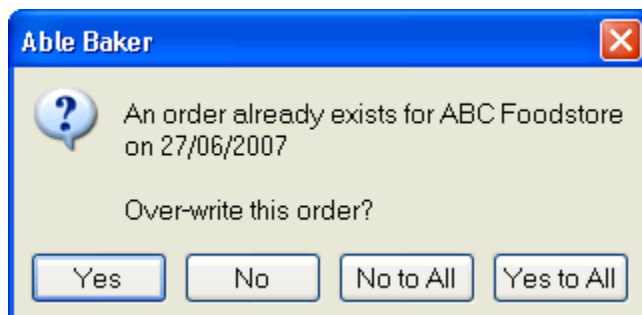

If you respond [Yes to All], any further existing orders for this date will be overwritten without further prompting.

In this example the response is of no consequence, as the overwritten orders will be identical, but in most instances you'll probably want to avoid this option.

Now that you have created the **Actual Orders** from the **Permanent Orders**, if a customer with a **Permanent Order** has asked for some one-off adjustment to

tomorrow's **Actual Order**, you could now go to [Customers, Orders, etc...], locate the new **Actual Order** and edit it in a similar way to how you edited the new order for *The Golden Duck Hotel*, above.

Daily Tasks - Print Delivery Notes

Back at the Daily Tasks group of the Task Selector, click [Print Delivery Notes...].
You will be prompted to "Select date of Delivery Notes to print". Select the same
date as you did for *Generate Daily Orders*, above, and the **Delivery Note Preview**
window should then appear, comprising a number of pages representing the
Delivery Notes for all the **Actual Orders** for the selected date.
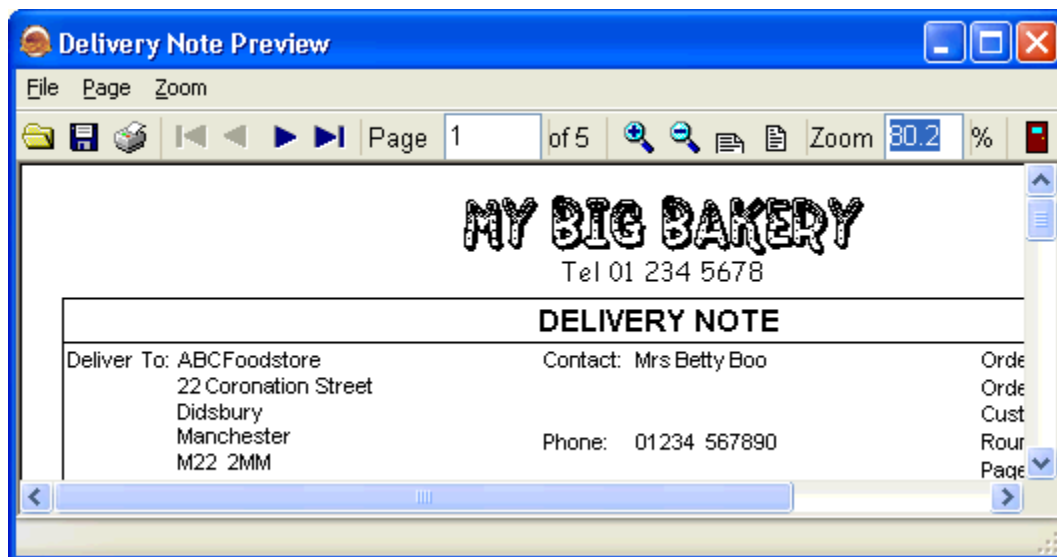
This style of preview is common to much of the printed output from *Able Baker*. From
here you can print the **Delivery Notes** by clicking the 🖨 printer icon on the bar at
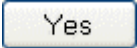the top of the preview. Do this now and you will see the Output Options dialog...
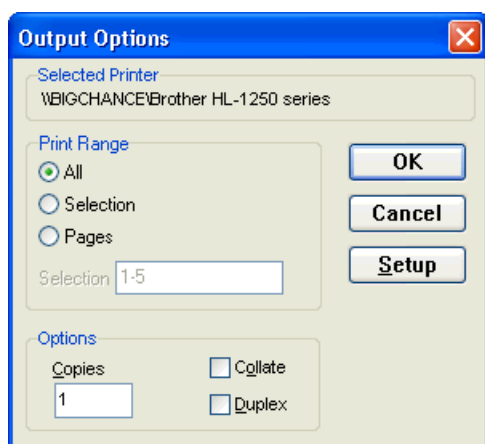
Here you can opt to print only certain
pages or multiple copies, and access
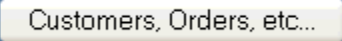settings for your printer.

For now click [**Cancel**] to return to the
preview.

Back at the Preview, note the **Save** icon 💾, from which you can save the **Delivery
Notes** in a *Rave Snapshot File* or as an *Adobe Acrobat PDF* file. There is no intrinsic
need to "Save" the Delivery Notes, as they can be recreated at any time. However, if
you use *Able Baker* at a different location from your bakery, you could save the
Delivery Notes as an Acrobat PDF file and email them to a computer at the bakery
for printing on-site.

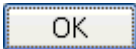**Exit** the **Preview** by clicking ▮. You will see the following prompt...

Click Yes .
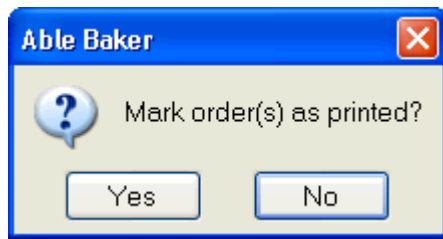
Once an order has been marked as printed, it cannot be changed without first being "un-printed". To see how this works, return to Customers, Orders, etc... , select *The Golden Duck Hotel*, and on the **Actual Orders** tab locate the order you created earlier. If you selected "Yes" above, there should now be a ☑ in the **Printed** column.

Click twice in the **Units** column of the "Iced Bun" item and attempt to change the number of units. You should see the following response:-
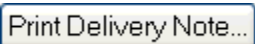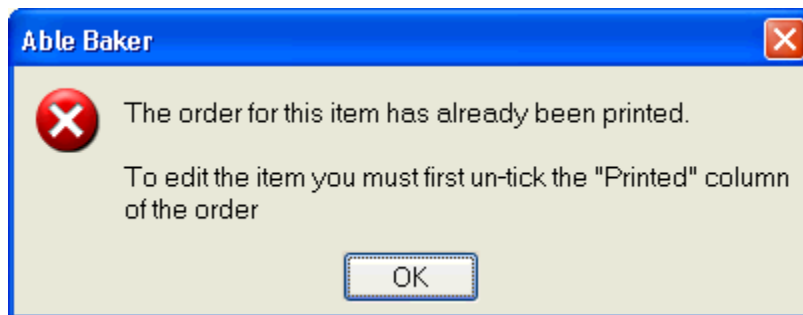
Click OK to close the dialog.

Now click on the ☑ in the **Printed** column of the order, to highlight it, and click again to clear it, thus ☐. Now again click on the **Units** column of the "Iced Buns" item, delete the "10" and replace it with "15" - let's pretend this emergency change to the order has just been called through, due to a sudden interest in buns. Click ✓ to save the change.
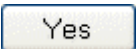
Earlier, from the Task Selector, we printed the **Delivery Notes** for all of tomorrow's orders. The Delivery Note for *The Golden Duck* would now be incorrect, but a replacement can be printed directly from the **Actual Orders** tab.

Make sure the correct Actual Order is selected, and from beneath the **Actual Orders** tab, click Print Delivery Note... . You should again see the **Delivery Note Preview**, but this time for a single-page document, just for this particular order.

Click ▮ to exit, and you should again be asked...
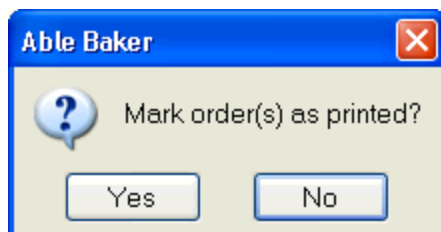
Click Yes , and the ☑ will re-appear in the **Printed** column for the order.

Click Close to return to the Task Selector.

Daily Tasks - Production Sheet

From the Daily Tasks group, click [Print Production Sheet...]. You will be prompted
to "Select date of Production Sheets to print" - accept the same date as previously.
Next the **Product Group Selector** will appear.
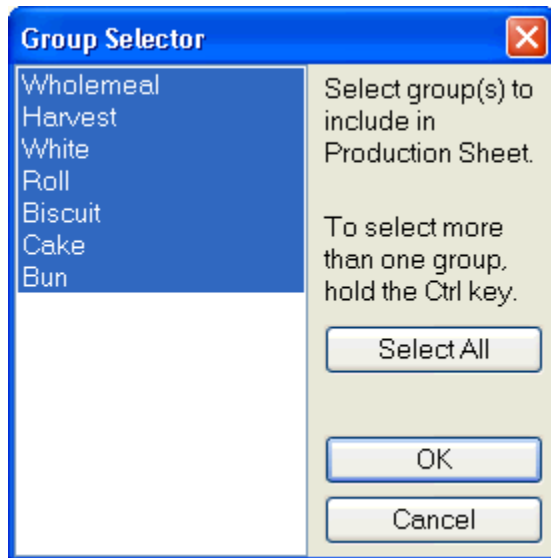
Here you have the option to limit the
Production Sheet to specific **Product
Groups**.

By default, all groups should be highlighted -
if they are not, click [Select All].

Click [OK].

The **Production Sheet Preview** will now appear. Each page represents a different
Production Group, with Products separated into sub-groups. These groupings, the
numbers used in the column calculations, and the Comments, are all drawn from the
Product List. Not all columns are applicable to all products.

It may be worth taken a moment to step through the pages of the Production Sheet,
using the navigator |◄ ◄ ► ►| at the top of the window, to get an idea of what is
possible.

The preview can be printed by clicking 🖨, or saved to disc as a *Rave Snapshot File*
or *Adobe Acrobat PDF* by clicking 💾.

Click ▮ to return to the Task Selector.

Daily Tasks - Product/Customer Array

Click [Print Product/Cust. Array...]. Once again, you will be asked to confirm or select
the date to be used - select the same date as previously.

Again you will see the **Group Selector**. Select all groups and click [OK].
You will then see the **Product/Customer Array Preview**. This shows the number of
units of each product required for each customer, and the total number of units
required for each product.

The "Total This Page" column exists incase the number of customers is sufficient for
the array to require further "columns" of pages.

Click ▮ to return to the Task Selector.

Daily Tasks - Print Orders as Invoices

Able Baker supports invoicing on a weekly and monthly basis. However there may be some customers and some orders that require invoicing immediately, the invoice to be delivered with the order. To print out such invoices, click
[Print Orders as Invoices...]. Select the same date as before, and click [OK].
The **Order Invoice Preview** will appear, showing a single invoice for *Bob's Tea Stall*.

To see how this has come about, exit the preview and re-open
[Customers, Orders, etc...]. Select *Bob's Tea Stall* in the **Customer List**, and select
the **Actual Orders** tab.

On the **Contact, Rounds & Discounts** tab, locate the **Invoice Frequency** field: this is set to "Per Order", meaning that each order is to be treated as its own invoice. Each time a new order is created for this customer, the **As Invoice** column of the
Actual Orders list is ticked ☑ automatically. Clicking [Print Orders as Invoices...] on
the Task Selector, as you did above, prints invoices for all such orders on the selected date.

If you inspect the **Actual Orders** for other customers, you will see that the **As Invoice** column is <u>not</u> ticked , as these customers have different **Invoice Frequency** settings on the **Contact, Rounds and Discounts** tab.

Daily Tasks - Product Labels

Still in the **Customers, Orders, etc** window, select *ABC Food Store* from the Customer List, and click on the **Labelling & Notes** tab.

Note that the **Label Type** is set to *Our Brand*. This means that this customer would like product labels supplied on their products, with "our" brand name, as distinct from "their" brand name. Note also that they do not want prices printed on their labels. Compare this with *Elliot's Farm Shop*, who also require product labels, but under their own brand, which is given as "Elliot's". Also, they require prices on the labels, drawn from **Label Prices 4** of the Product List.

If you check the other customers, you will see that for some, **Label Type** is set to *None*, meaning their orders do not require labels.

Close the **Customers, Orders etc** window, and from the Daily Tasks group of the Task Selector, click [Print Product Labels...]. Select the appropriate date, click [OK], and the **Product Labels Preview** will appear. This shows the pages of product labels to be printed for the day's orders, with one label for each unit of each product requiring a label, for each order requiring labels. The labels for each order are separated by a marker label, showing the customer name and order number.

For more information on how to adjust the label layout, see Product Labels.

Click ▪ to return to the Task Selector.

Daily Tasks - Print Rounds with Orders

Just to finish off the Daily Tasks group, click [Print Rounds with Orders], select the appropriate date, and the **Rounds with Orders Preview** will appear. This shows the Delivery Rounds, but only includes those customers who have orders for the selected date.
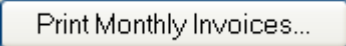
Invoicing

On the Task Selector, locate the Weekly Tasks group. Click [Generate Weekly Invoices...], and you will see a familiar date-selection calendar. Rather than the "tomorrow" date you have used for the previous examples, you need to select a date in the past for which orders exist that require invoicing. For the sake of this example, select Monday, 4th June, 2007. (Note that Weekly Invoices require you to specify the Monday commencing the week to be invoiced.)
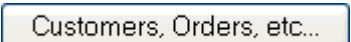
Invoices will now be generated for all customers with orders within the specified week, whose **Invoice Frequency** is set to *Weekly.* (If such a customer already has an invoice covering any orders that week, a warning will be given and a new invoice will not be created for that customer.)

To view the invoices, click [Print Weekly Invoices...], and select the same date - Monday, 4th June, 2007. The **Weekly Invoice Preview** should appear, showing the relevant invoices. If you zoom in for a closer look, using *Zoom In* 🔍 or *Zoom to fit page width* 🖹, you will see that the invoices itemize the number of each product ordered for each day of the invoice period. Click ▪ to exit and [Yes] to mark the invoices as printed.

Now locate the Monthly Tasks group. Click [Generate Monthly Invoices...], and select a start date of Sunday, 6th May, 2007, and an end date of Tuesday 5th of June. Invoices will now be generated for all customers with orders within the specified period whose **Invoice Frequency** is set to *Monthly*. Again, if a customer already has an invoice covering any orders within that period, a new invoice will not be created, and a warning will appear.

To view the monthly invoices, click [Print Monthly Invoices...] and enter the same start date - Sunday, 6th May, 2007 - and the **Monthly Invoice Preview** will appear. Again, the invoices itemize the number of each product ordered for each day.

Though you have just made invoices to cover a period of exactly one month, a "Monthly" invoice in *Able Baker* can be made to cover a period of anything from 1 to 35 days. As these invoices cover a period of just 30 days, you will see there is some space towards the right-hand side where the unused five days would otherwise be accommodated.

Exit the preview and return to [Customers, Orders, etc...].

If you move through the Customer records using the Customer List or the navigator buttons [|◄] [◄] [►] [►|] at the top of the window, and select the **Weekly Invoices** and **Monthly Invoices** tabs, you should find the entries for the invoices you have just created.

Note that you can create invoices one-at-a-time for individual customers from these tabs, and also print individual invoices.

If you inspect the **Account** tab, you will see a corresponding debit entry for each invoice.

Note the **Receipts** tab, where you enter payments received from each customer. Feel free to experiment by entering some new receipts - click [+] to get started. Each receipt entry will also be given a corresponding credit entry on the **Account** tab.

End of tutorial.