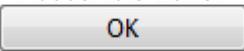
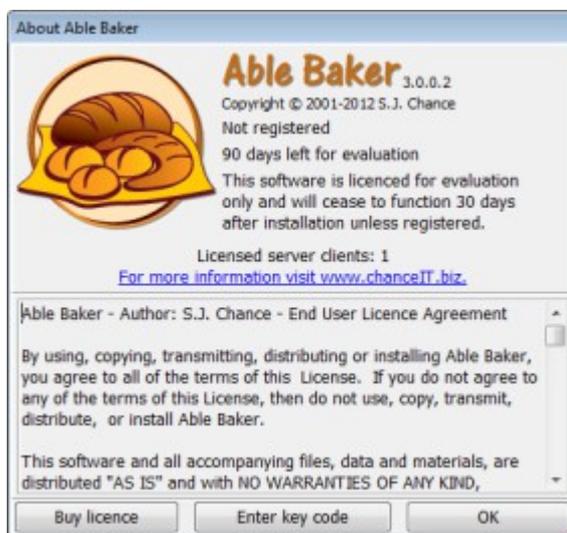


Able Baker Tutorial

In this tutorial, you will use one of the example databases supplied with Able Baker to experiment with some of its functions - either "EAN Demo" or "UPC Demo". The example database should be selected automatically the first time you run the program.

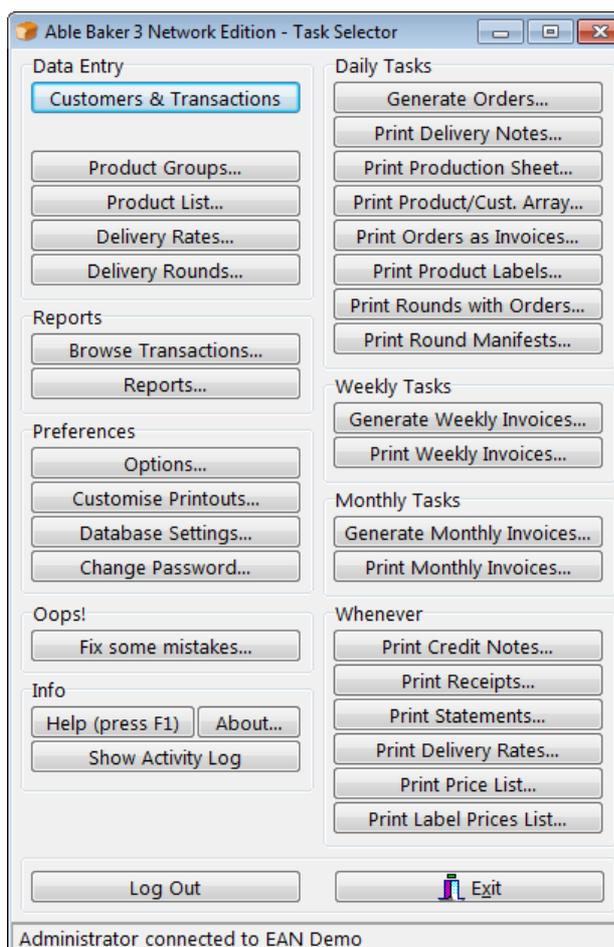
Start Able Baker.

If the "About Able Baker" box appears, click  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.

To check that you are connected the example database, look at the status panel at the bottom of the Task Selector: it should read something like "Administrator connected to EAN Demo" or "Administrator connected to UPC Demo". If you are connected to another database, or no database at all, see *Database Settings* in the User Guide.



A New Order

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

On the Task Selector, locate the group of buttons headed *Data Entry*. Click the *Customers & Transactions* button, and the *Customers & Transactions* 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. To display the contents of a customer record, click on its entry in the left-hand column.

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 four tabs showing details about the customer...

Contacts, Prices & Delivery				Addresses	Labelling	Notes
Contact Names		Telephone Numbers		Delivery		
Mrs Betty Boo		Tel 1: 01234 567890		Round/Position: 1 / 3		
		Tel 2:		Rates: Out of Town 1		
		Fax:		<input checked="" type="checkbox"/> Show Prices		
Email: betty@abcfoodstore.co		Invoice Freq.: Monthly		Prices: Price List 1		Discount: 15.00%

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 you need now is the **Actual Orders** tab. Click on the tab 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				<input checked="" type="checkbox"/>	£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 15/06/2007. 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.

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.

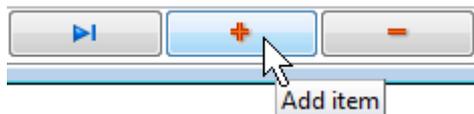
Accept the highlighted date by clicking **OK**. A new order will be created containing the same items as the last - you can verify this by looking at the new **Order #** and **Date** entries at the end of the list of orders.

Now to add the iced buns.

Beneath the list of **Actual Order Items** you will 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...

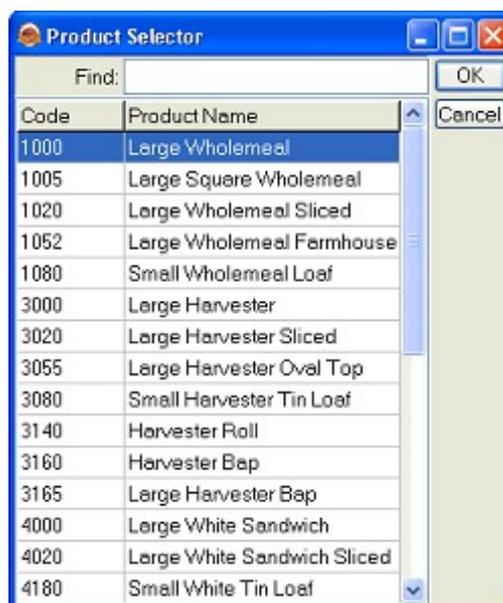


Click the "Add Item" button and an empty line will be inserted in the **Actual Order Items** list.

Double-click in the **Product Code** column of the empty line, 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  - 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). Enter "10" in the **Units** column, and click the  button beneath the list, to save the information. Note that the position of the new item in the list may change, as the list will be sorted in order or **Product Code**.

Tip: If the  button is greyed like this -  - then the 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.

The **Actual Order Items** list should now look something 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

Note that, though you have added and "saved" the new items, you have not yet saved the amended order itself: to do so, click on the save button beneath the **Actual Orders** list (i.e. above the **Actual Order Items** list). This will save the amended order and its new items to the database. If, instead, you clicked on the Cancel button beneath the **Actual Orders** list, the new items would be removed and the order would revert to how it was previously.

Before you 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 will see a Permanent Order for each day of the week, from Monday to Saturday.

Permanent Orders				
Order Day	Comment	Active	Price (excl)	
1-MON		<input checked="" type="checkbox"/>	£32.47	
2-TUE		<input checked="" type="checkbox"/>	£32.47	
3-WED		<input checked="" type="checkbox"/>	£32.47	
4-THU		<input checked="" type="checkbox"/>	£36.67	
5-FRI		<input checked="" type="checkbox"/>	£32.47	
6-SAT		<input checked="" type="checkbox"/>	£7.00	

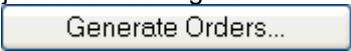
Usually this customer requires the same order each week, for any given day of the week. Each day, AbleBaker uses the corresponding Permanent Order to create an Actual Order for this customer: you will see how this works shortly.

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

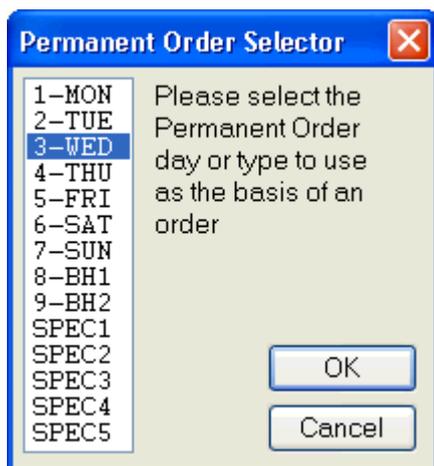
Click to return to the *Task Selector*.

Daily Tasks - Generate Orders

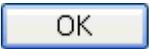
Now it's time to make use of the **Permanent Orders** we have just been looking at.

On the *Task Selector*, locate the **Daily Tasks** group, and click . A calendar appears with the prompt "Select date of orders to generate", and tomorrow's date selected. (As before, if tomorrow is a Sunday, please select the following day). Click .

The **Permanent Order Selector** now appears, with the corresponding Permanent Order day already highlighted.



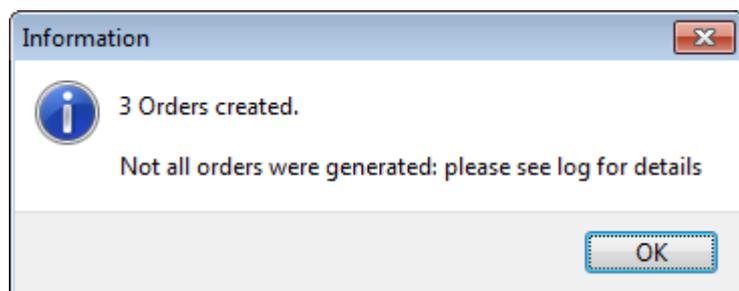
(Usually you will want to accept this setting. However, should it be useful to have permanent orders for Bank Holidays or other recurring special days, then this is where you would opt to use them in place of the "regular" orders.)

Click  and the orders will be created.

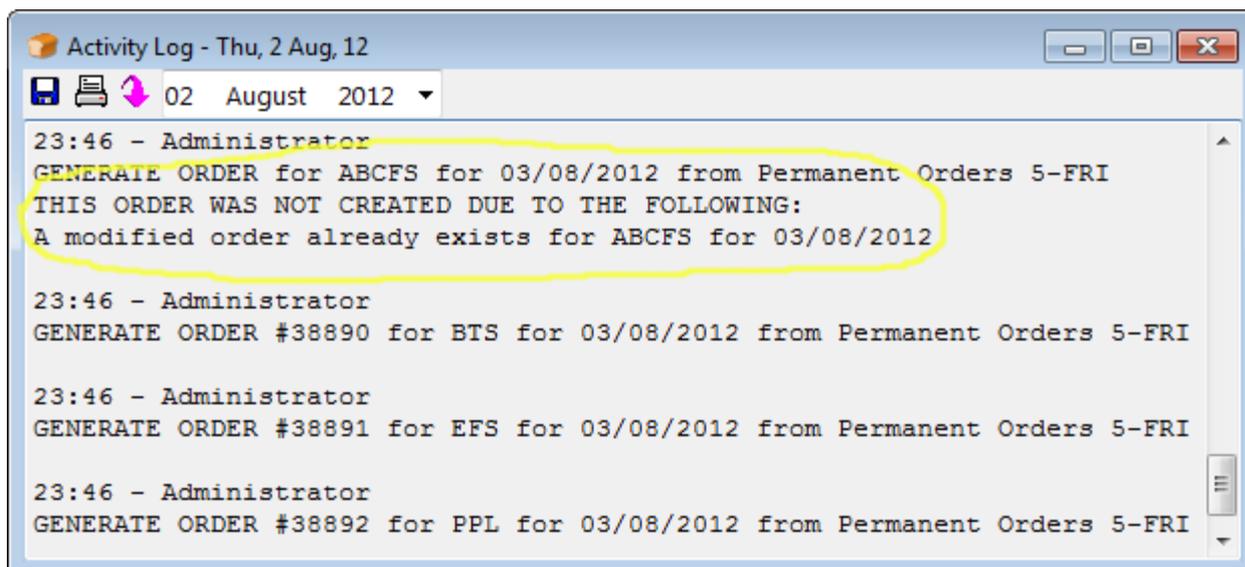
If you had already created manually an Actual Order for a customer who has an active Permanent Order for the day selected, the existing Actual Order would be preserved and no new order would be created for that customer.

Similarly, if you had already generated the Actual Orders for the selected date, and then modified one of them (in similar fashion to how you modified the order for the *Golden Duck Hotel* above), running "Generate Orders" again would not over-write the modified order.

In such cases, a message box would appear, similar to this:



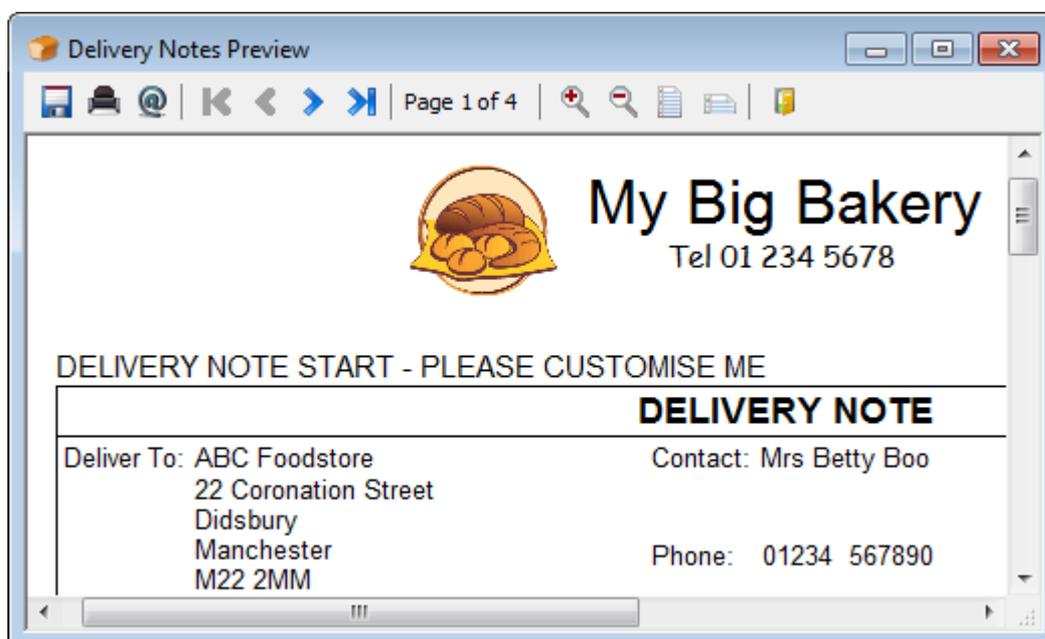
When you clicked OK, an Activity Log would then be displayed, showing information explaining why one or more orders were not generate, as illustrated below:



Here, the key information is that "a modified order already exists".

Daily Tasks - Print Delivery Notes

Back at the *Daily Tasks* group of the *Task Selector*, click . 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...

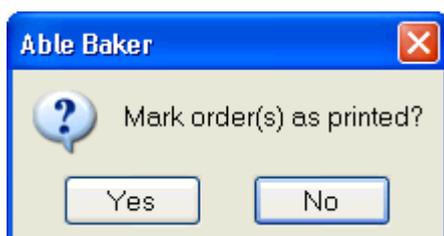


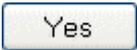
Here you can opt to print only certain pages or multiple copies, and access settings for your printer.

For now click  to return to the preview.

Back at the Preview, note the **Save** icon , from which you can save the Delivery Notes as a 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 a PDF file and then email them as an attachment, to a computer at the bakery, for printing on-site.

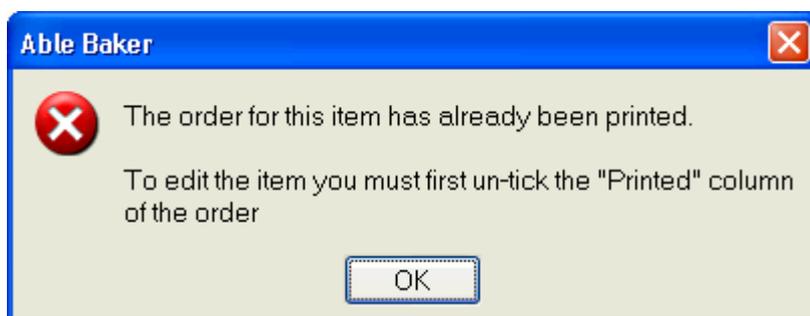
Exit the **Preview** by clicking . You will see the following prompt...

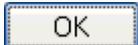


Click .

Once an order has been marked as printed, it cannot be changed or over-written without first being *un-printed*. To see how this works, return to *Customers & Transactions*, 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:-



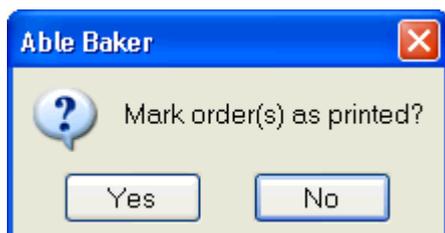
Click  to close the dialog.

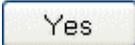
Now click on the in the **Printed** column of the order, to highlight it, and click again to clear it, thus . Now again click on the **Units** column of the "Iced Buns" item, delete the "10" and replace it with "15" - let's pretend this emergency change to the order has just been called through, due to a sudden interest in buns. Click both the  below the *Items* list to save the change there, then click the  below the *Actual Orders* list to confirm the changes to the order itself - if you forget either of these steps, the program will prompt you when you try to leave the record.

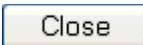
Earlier, from the *Task Selector*, we printed the **Delivery Notes** for all of tomorrow's orders. The Delivery Note for *The Golden Duck* would now be incorrect, but a replacement can be printed directly from the **Actual Orders** tab.

Make sure the correct Actual Order is selected, and from beneath the **Actual Orders** tab, click . 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...

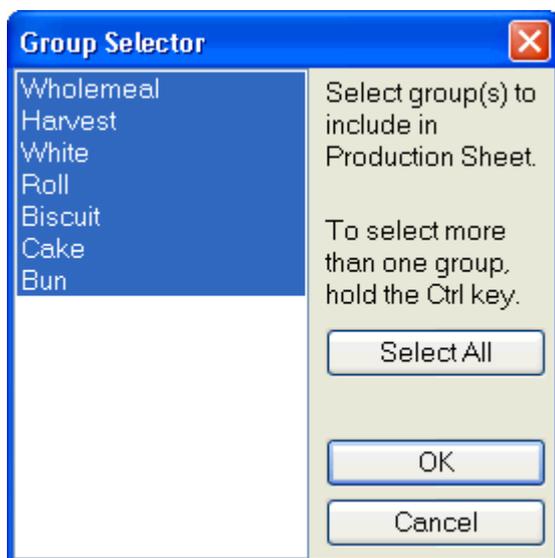


Click , and the will re-appear in the **Printed** column for the order.

Click  to return to the *Task Selector*.

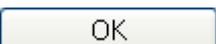
Daily Tasks - Production Sheet

From the *Daily Tasks* group, click . 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 .

Click .

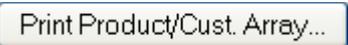
The **Production Sheet Preview** will now appear. Each page represents a different **Production Group**, with Products separated into sub-groups. These groupings, the values used in the column calculations, and the Comments, are all drawn from the *Product List*. Not all columns are applicable to all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

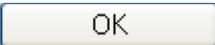
It may be worth taken a moment to step through the pages of the Production Sheet, using the navigator  at the top of the window, to get an idea of what is possible.

The preview can be printed by clicking , or saved to disc as a *PDF* by clicking .

Click  to return to the Task Selector.

Daily Tasks - Product/Customer Array

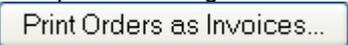
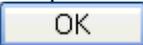
Click . Once again, you will be asked to confirm or select the date to be used - select the same date as previously.

Again you will see the **Group Selector**. Select all groups and click . 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.

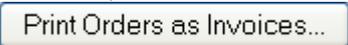
The "Total This Page" column exists in case the number of customers is sufficient for the array to require further "columns" of pages.

Click  to return to the *Task Selector*.

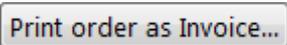
Daily Tasks - Print Orders as Invoices

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 . Select the same date as before, and click . 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 & Transactions*. Select *Bob's Tea Stall* in the **Customer List**, and select the **Actual Orders** tab.

On the **Contacts, Prices & Delivery** 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  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 not ticked, as these customers have different **Invoice Frequency** settings on the **Contacts, Prices & Delivery** tab.

Note that, on the Actual Orders tab, the  button is only enabled when the currently selected order has a tick in the "As Invoice" column.

Daily Tasks - Product Labels

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

The screenshot shows the 'Labelling' tab with the following settings:

- Label Type:** Our Brand (dropdown menu)
- Label Prices:** None (dropdown menu)
- Customer's Bar Code Prefix:** (empty text box)
- Label Size:** Regular (selected radio button), Small (unselected radio button)
- Cust. Brand:** (empty text box), **Brand Font...:** (button)
- Cust. Details:** (empty text box), **Details Font...:** (button)

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 & Transactions** window, and from the *Daily Tasks* group of the *Task Selector*, click

Print Product Labels...

. Select the appropriate date, click **OK**, accept **Regular** as the

Label Size, 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* in the User Guide.

Click  to return to the *Task Selector*.

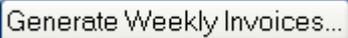
Daily Tasks - Print Rounds with Orders

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. You may also like to try

Print Round Manifests...

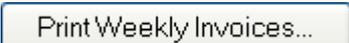
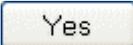
, which produces a separate product/customer array for each round, complete with product totals.

Invoicing

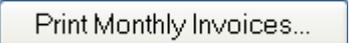
On the *Task Selector*, locate the *Weekly Tasks* group. Click , and you will see a familiar date-selection calendar. Rather than the "tomorrow" date you have used for the previous examples, you need to select a Monday commencing a week in the past.

For the sake of this example, select Monday, 4th June, 2007 (though that is now some years ago, by clicking on the year in the date-selector, it's quite easy to zoom back into the past.)

Invoices will now be generated for all customers with orders within the specified week, whose **Invoice Frequency** is set to "Weekly". (Any orders covered by an existing invoice will not be included in the new invoice.)

To view the invoices, click , 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 itemise the number of each product ordered for each day of the invoice period. Click  to exit and  to mark the invoices as printed.

Now locate the *Monthly Tasks* group. Click , and select a start date of Sunday, 6th May, 2007, and an end date of Tuesday, 5th of June, 2007. Invoices will now be generated for all customers with orders within the specified period, whose **Invoice Frequency** is set to "Monthly".

To view the monthly invoices, click , and enter the same start date - Sunday, 6th May, 2007 - and the **Monthly Invoice Preview** will appear. Again, the invoices itemise 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. Because the invoices you just made cover a period of only 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 reopen *Customers & Transactions*.

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, from these tabs, you can create and print invoices for the selected customer, on an individual basis.

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 - Please see *Preparing for use* in the User Guide, before inputting your own data.