



GETTING STARTED

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Introduction

Thank you for purchasing FlexiBake or for downloading the 30 day trial. Although FlexiBake is intuitive and very easy to use, we do recommend you read this user guide as a starting point and then download and then read the Nutritional Bundle User Guide.

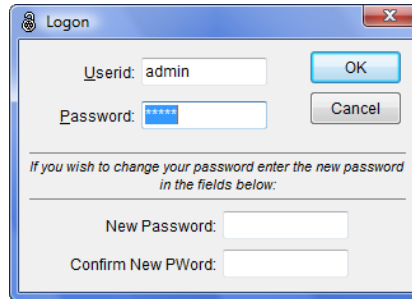
Please do not hesitate to contact us if you have any questions.

Tel: (604) 637-6528

Email: support@flexibake.com

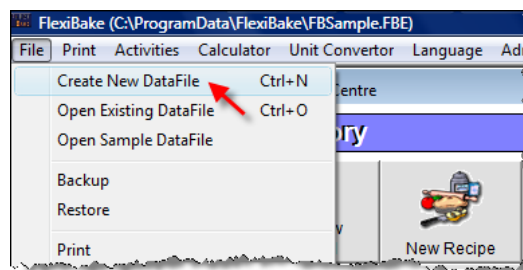
Creating a new database for your company

After installing and starting FlexiBake, the Logon screen will be displayed as shown below.



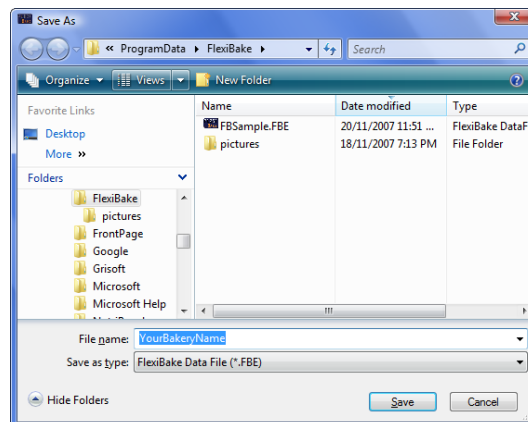
Enter admin for both the Userid and Password. A sample database is automatically opened when you first run the program. Once you have browsed through the sample database you will probably want to begin entering your own information into a new clean database.

To do this, click the **File** menu and then the **Create New DataFile** option.



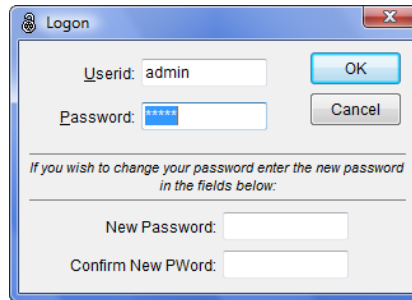
FlexiBake Main Screen

Enter a name for your new datafile and browse to the folder where you want to save it to. With Windows XP, the default path is C:\Program Files\FlexiBake Enterprise\Data\
With Microsoft Vista, the default path is C:\Program Data\FlexiBake\



Next the Logon screen will be displayed. Enter **admin** for both the Userid and Password. These are the default settings for the Administrator account so you should change the password. To do

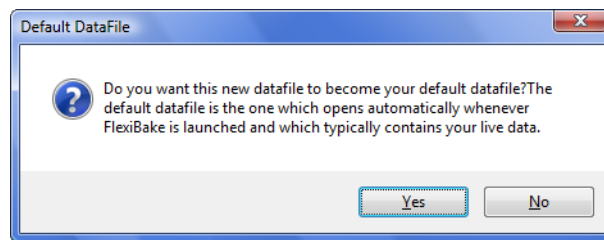
this, enter your new password in both the New Password and the Confirm New PWord fields and then click the OK button.



The Logon dialog box contains the following fields and buttons:

- Userid: admin
- Password: [masked]
- Buttons: OK, Cancel
- Text: "If you wish to change your password enter the new password in the fields below:"
- New Password: [text box]
- Confirm New PWord: [text box]

Click the Yes button when the Default Datafile message is displayed, as you will want your new database to be the one that it automatically opened whenever FlexiBake is launched.

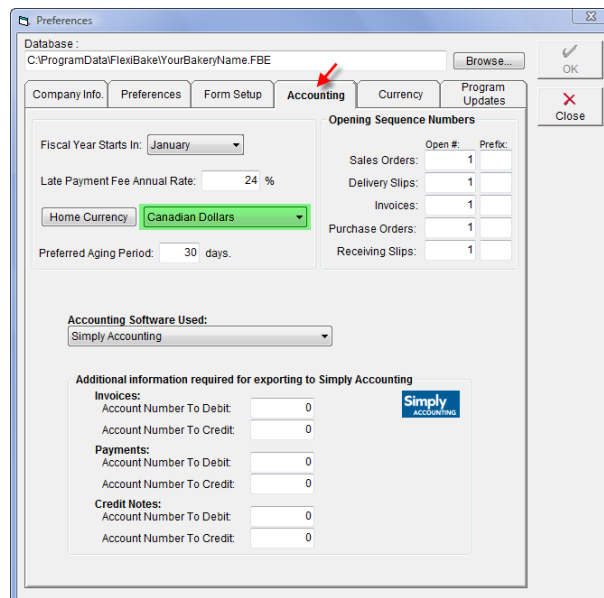


The Default DataFile dialog box contains the following text and buttons:

- Text: "Do you want this new datafile to become your default datafile? The default datafile is the one which opens automatically whenever FlexiBake is launched and which typically contains your live data."
- Buttons: Yes, No

Default DataFile Message

FlexiBake will now display the Preferences screen so that you can update the default preferences to those that best suit your business. You may return at any time in the future to make additional changes but for now, you must select your home currency from the dropdown list on the Accounting Tab. If your home currency does not exist, click the Home Currency button to add it to the list.



The Preferences window - Accounting Tab contains the following sections and fields:

- Database: C:\ProgramData\FlexiBake\YourBakeryName\FBE
- Buttons: Browse..., OK, Close
- Company Info, Preferences, Form Setup, Accounting, Currency, Program Updates
- Fiscal Year Starts In: January
- Late Payment Fee Annual Rate: 24 %
- Home Currency: Canadian Dollars
- Preferred Aging Period: 30 days
- Accounting Software Used: Simply Accounting
- Opening Sequence Numbers table:

	Open #:	Prefix:
Sales Orders:	1	
Delivery Slips:	1	
Invoices:	1	
Purchase Orders:	1	
Receiving Slips:	1	
- Additional information required for exporting to Simply Accounting:
 - Invoices: Account Number To Debit: 0, Account Number To Credit: 0
 - Payments: Account Number To Debit: 0, Account Number To Credit: 0
 - Credit Notes: Account Number To Debit: 0, Account Number To Credit: 0

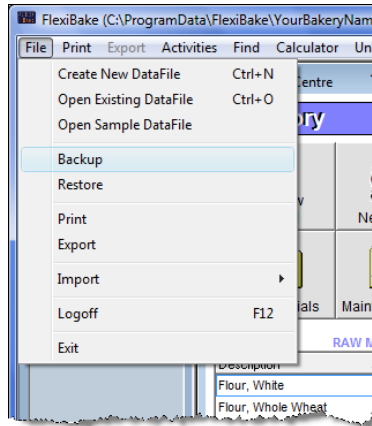
Preferences window - Accounting Tab

Things To Know About The Sample Database (FBSample.FBE)

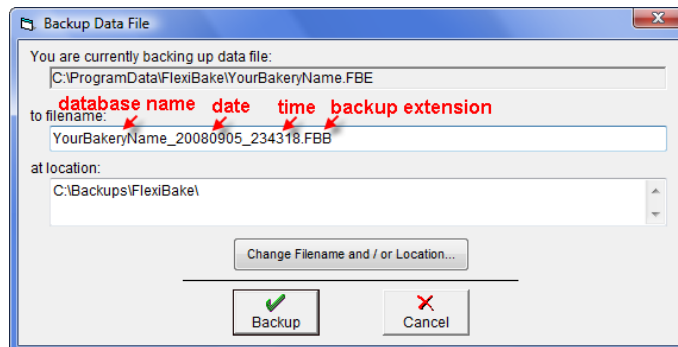
1. Do not use this as your company database as it will be overwritten when upgrading your software.
2. If you have purchased a Nutritional Bundle, you are able to open the sample database at any time and explore all the functionality included with a full license.
3. FlexiBake will display all reports on the screen but does not allow reports to be printed from the sample database.

Backing Up and Restoring your Database

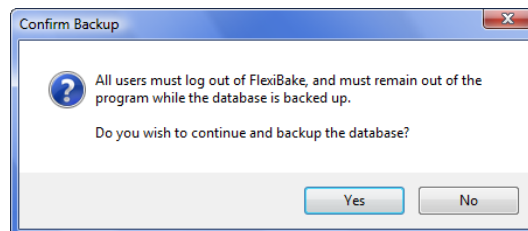
To backup your datafile, click the Backup option within the File menu.



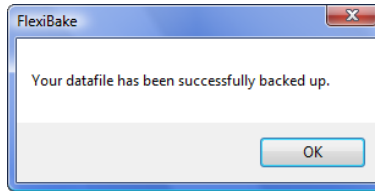
FlexiBake automatically selects the datafile you currently have open to backup and assigns a backup filename in the following format: DatabaseName_date_time.fbb (backup file extension). Click the Change Filename and / or Location button to select the folder where you want your backup files saved to and then click the Backup button to start the backup.



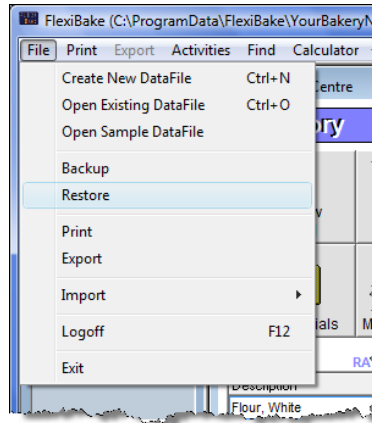
Backup Data File window



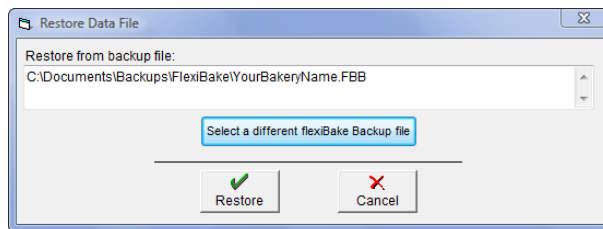
FlexiBake confirms that the backup file has been successfully created by displaying the following message:



To restore your database from a backup file, click the Restore option from within the File menu.

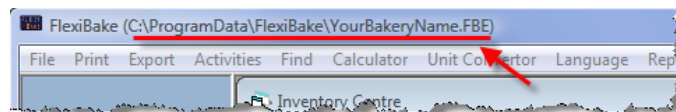


Select the FlexiBake backup file you want to restore.



Restore Data File window

Ensure that the datafile currently displayed in the FlexiBake window title is the datafile you want to overwrite with the backup file.



Database name and location

IMPORTANT: Once you click the Restore button, the datafile currently open will be overwritten by the backup file. This action cannot be reversed, so take care when using the restore function.

You should be backing your database up on a daily basis. You may prefer to use your own backup program to do this and are not restricted to using the FlexiBake Backup/Restore function.

Company Preferences

While there are many preferences that can be entered, only those relevant to the FlexiBake Nutritional Module are mentioned below. The settings applicable to other FlexiBake modules are covered in the specific user guides.

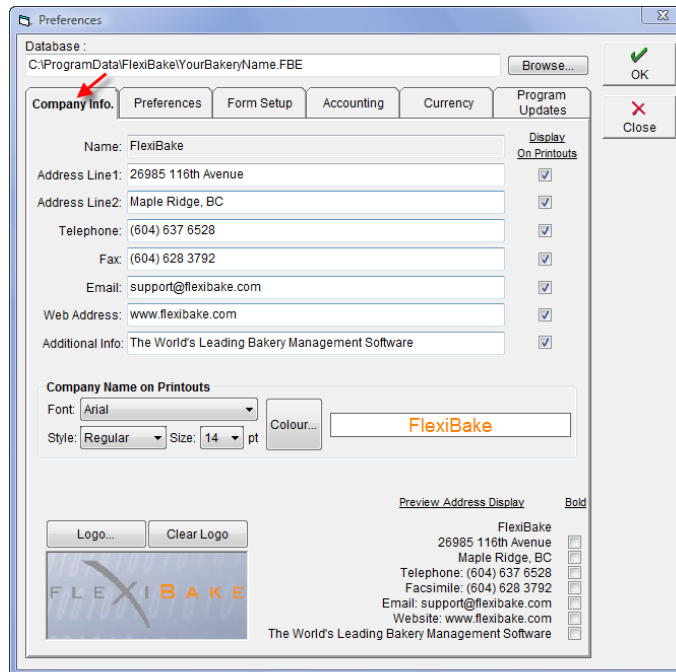
Begin by clicking the Administration menu and then the Preferences option.



Administration Menu - Preferences

Company Info Tab

The company name is linked to the software license key and is automatically entered once the software has been purchased and installed. Enter your company address details and then click the Logo button to attach your company logo. Your company logo will appear on Sales Orders and Purchase Orders as well as other reports and forms.



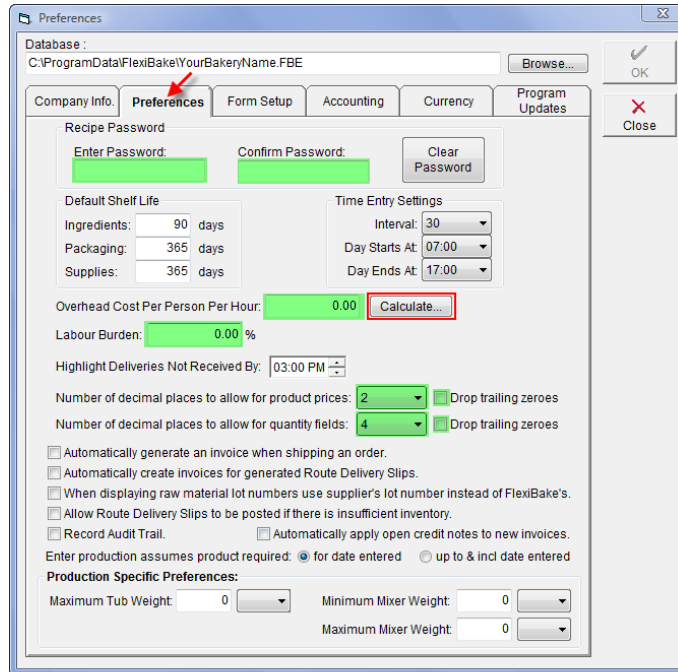
Preferences window - Company Info. tab

Need help converting or resizing your company logo !

Then email your logo to support@flexibake.com and let us take care of this for you.

Preferences Tab

You can choose to enter a recipe password if you want to password protect some of your recipes. Enter the overhead cost per person per hour if it is known, or else click the Calculate button to calculate your Overhead cost. Overhead cost is an important cost factor and should be taken into account when determining product costs. Enter the % Labour burden. This is a cost factor to cover other employee expenses (e.g. vacation days, sick days etc.) Lastly, you can decide on the number of decimal places to be displayed for your product pricing and quantity fields.



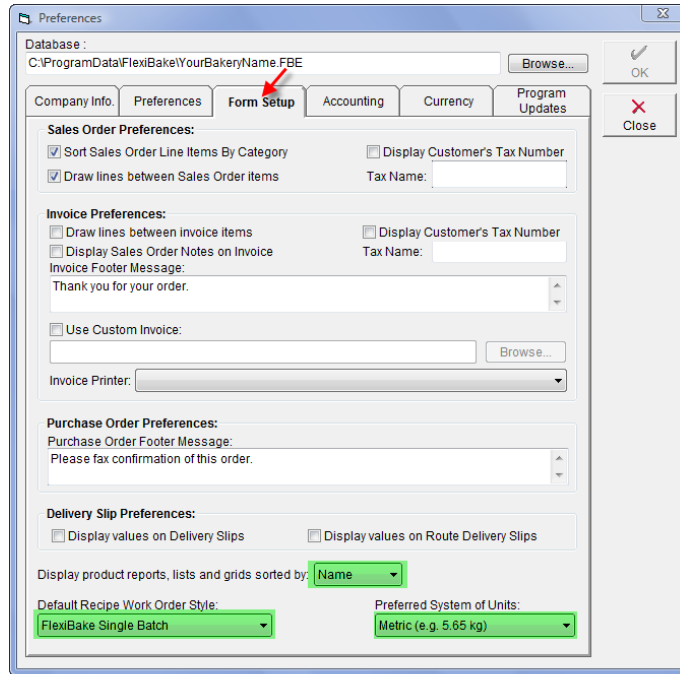
The screenshot shows the 'Preferences' window with the 'Preferences' tab selected. The window title is 'Preferences'. The database path is 'C:\ProgramData\FlexiBake\YourBakeryName.FBE'. The 'Preferences' tab is highlighted with a red arrow. The 'Recipe Password' section has 'Enter Password' and 'Confirm Password' fields, both containing green text, and a 'Clear Password' button. The 'Default Shelf Life' section has 'Ingredients: 90 days', 'Packaging: 365 days', and 'Supplies: 365 days'. The 'Time Entry Settings' section has 'Interval: 30', 'Day Starts At: 07:00', and 'Day Ends At: 17:00'. The 'Overhead Cost Per Person Per Hour' field is set to '0.00' and has a 'Calculate...' button next to it, which is highlighted with a red box. The 'Labour Burden' field is set to '0.00 %'. The 'Highlight Deliveries Not Received By' field is set to '03:00 PM'. The 'Number of decimal places to allow for product prices' is set to '2' and 'Drop trailing zeroes' is checked. The 'Number of decimal places to allow for quantity fields' is set to '4' and 'Drop trailing zeroes' is checked. There are several unchecked checkboxes for 'Automatically generate an invoice when shipping an order.', 'Automatically create invoices for generated Route Delivery Slips.', 'When displaying raw material lot numbers use supplier's lot number instead of FlexiBake's.', 'Allow Route Delivery Slips to be posted if there is insufficient inventory.', and 'Record Audit Trail.'. The 'Automatically apply open credit notes to new invoices.' checkbox is also unchecked. The 'Enter production assumes product required:' section has 'for date entered' selected. The 'Production Specific Preferences' section has 'Maximum Tub Weight: 0', 'Minimum Mixer Weight: 0', and 'Maximum Mixer Weight: 0'.

Preferences window - Preferences tab

Form Setup Tab

Choose whether to display product reports, list and grids sorted by code or by name. Although this becomes the default setting you can always change the sort order of the records displayed in a grid by clicking the column heading you want to sort by.

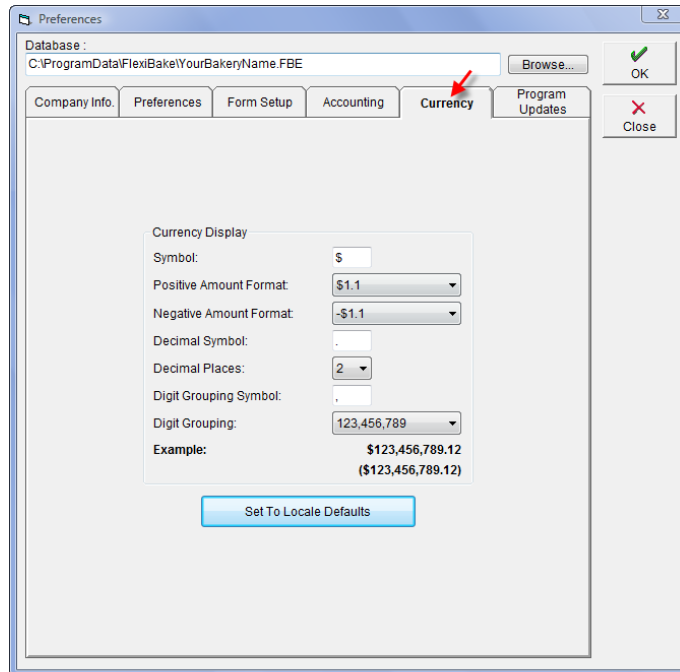
Select the recipe Work Order template that will be selected by default when creating a new recipe. Choose your preferred measurement units (Metric, Imperial "lb" or Imperial "lb oz") to be used as the default for all your recipes. If a specific recipe requires a different template and/or units, then change this option within the Recipe screen.



Preferences window - Form Setup tab

Currency Tab

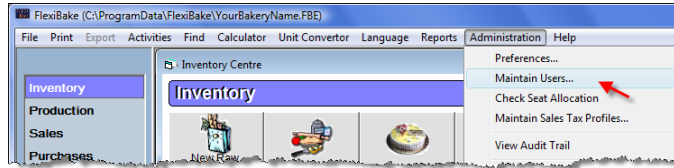
Enter your home currency symbol and formatting preferences.



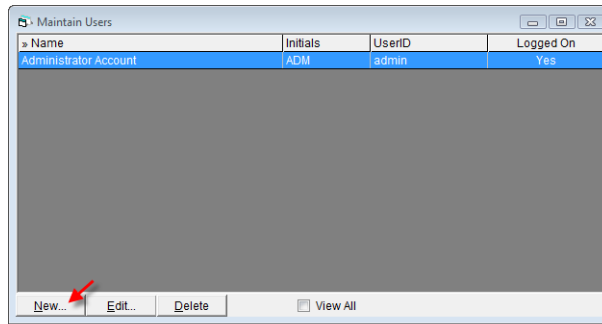
Preferences window - Currency Tab

Creating User Accounts

To create a FlexiBake user, click the Administration menu and then the Maintain Users option.

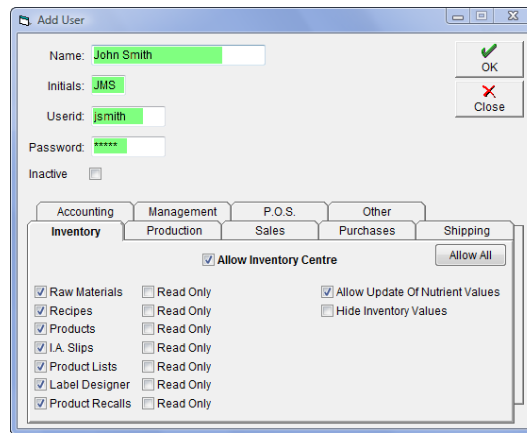


The Maintain Users screen displays the current user accounts. Click the New button.



Maintain Users window

The Add User screen is displayed. The four fields highlighted below are mandatory and must be completed before the record can be saved. Check the Centres and functionality within each Centre the user is permitted to access. To allow a user to view but not to add or modify data, check the Read Only checkbox.



Add User window

Inactive Checkbox – Check to prevent a User from logging on. The following message is displayed if a user attempts to logon when their account has been made inactive.

