



GlobalBake - Feature Groups *from Brian Fox*

FG - Customer Management:

- Detailed customer information. Postal address, delivery address, company email, phone and fax. Ability to have multiple contact names with their positions and other phone and email details.
- Multiple grouping options. Can group by type, department and location. Type can have sub types that will group similar customers in a sub type and include them in the overall type.
- Sales Rep allocation available for each customer.
- Internal accounts available for POS applications.
- Head office accounts available for billings.
- Up to five pricing groups can set your base prices, combined with a discount matrix or allocation to a price book.
- Concessions by customer/product by date range (\$ or %) can be applied. Bulk application facilitated.
- Settlement and rebate discounts can be applied. Rebates can be accrued or applied at invoice.
- Promotional Expectations by product/date may be loaded and compared with actual.
- Delivery can have set phone times for each day. No delivery days marked.
- May be allocated to multiple runs E.g. Bread and Pies on Mon Tue etc. For runs, drop orders can be managed.
- Standing orders are done by product by date with 3 shifts per day available.
- Shadow orders are done by product by day by shift. 'Batch create' option for shadow orders based on sales history of comparable types etc.
- Asset management e.g. Pie warmers, advertising.
- Forward dated variances to orders may be entered.
- Forward dated order restrictions e.g. No delivery or swap Monday with Friday etc.
- Commissions by product by customer or just by customer may be set. Commission restrictions during promotion may be set.
- Restricted product list by customer.
- Product suffix option to facilitate auto select of product at order entry. E.g. Suffix CL would select product 400CL rather than 400 at order entry if it existed.
- What if sales calculator showing margins by all products and by specific product. Includes settlement, discount, commissions etc
- Full adhoc reporting available, customised report options may be saved. Output to printer or file to export. Label output option also.



GlobalBake - Feature Groups (2)

FG - Sales Management:

- Generate option produces live orders for a day from order data on customer. May be done for specific product bake types. May be done based on sales history instead of standings. May be done by shift.
- Multiple system options regards shadow orders, exists dockets etc.
- Flexible order entry modes. (*fast mode for exp. Users*) Mode set by user. Sets fields and sequence of fields at order entry, mode of input etc. Confirm stage may be added as option. Stales may be entered at the same time as order or separately.
- Management reports by user of orders entered, changed, up sold etc.
- Invoicing options include, no delivery note, or priced delivery note, or un-priced delivery note with a daily invoice or weekly invoice. Statement may be COD, or weekly or fortnightly (even or odd) and monthly. Set by customer. EDI reporting available for selected formats.
- Debit/Credit orders require a selected reason with full reporting by reason customer or product of all such orders.
- Formats for output selected for system from constantly updated lists.
- Full accounts receivable trial balance with optional details and by degree of overdue.
- Receipting by batch or singly. Direct Debit functions available.
- Journals available with audit.
- All functions include created and changed by audit.

FG - Sales History & Forecasting:

Sales History:

- Full history available back to original order line detail. Summaries by week, month kept by customer, type, product, and product group.
- Comprehensive customer/product report with date ranges, type ranges, route ranges, group ranges, comparative period ranges, file output options, sort options available.
- Full reporting over periods of debit/credit analysis e.g. Stales, damaged goods, shortages.
- Margin analysis over full history available, available in detail or summarized.
- Promotional expectation versus actual reporting.
- Reporting of comparative sales over promotion period to normal period. Management and reporting of other costs e.g. Settlement discount, support charges, rebates, commissions to give full managing analysis.

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GlobalBake - Inventory Management: (3)

Ingredients

- These are purchased but are not made or sold.
- Has stock units, use-in units and alternative stock-take units.
- Have a Reorder algorithm selected by product.
 - Dynamic reorder algorithm based on average daily usage over last 4 weeks and order lead times.
 - Static algorithm based on minimum and maximum stock.
 - Buy to order which links directly to daily sales orders.
- They have a reorder pack size multiplier.
- Can have multiple suppliers with different supplier codes, purchase units, and pricing.
- Has a simple clone facility to make additional ingredients based on existing ingredients fast.
- Retains full purchase and use history.
- A stock-take system based on date makes loading of stock-take levels easier and the system may be kept running after the count has been made. .
- Has adjustments and stock issue options for stock management.
- Has the option to draw buy-in products at sale time or by production.
- A what-if calculator allows you to see the impact of a price change on products sold.

Made up ingredients/Products in progress

- These are not purchased or sold but they are made.
- Has stock level by day.
- Can have manufacture planned or on demand.
- Has a shelf life field.
- Existing products may be simply cloned to facilitate entry of similar products.
- These are linked via recipe system.
- Has a stock-take system for made up products by stock location.
- Has the ability to transfer stock between locations.
- Can have multiple stock locations in bakery.

Sales Forecasting:

- Weighted analysis based on selectable weighting and periodicity. Curve fitting trend analysis based on selected periodicity. May be filtered by product/group and run range.
- Graphs, reports available
- May be connected to production plan for pre loading plan.
- Order generation by history available for selected customers and products.
- Review of sales/stales for selected dates by customer/product and linked back to standing orders.



GlobalBake - Feature Groups (4)

FG - Sales Commissions:

- Commission percent can be set by customer or customer / product for sales rep and route contractor.
- Commissions may be held for a customer from a date.
- Commissions may be varied over a date range by customer and product, for instance during a promotion date range.
- Optional reporting formats by route, contractor, customer and product. Sales, Margins and commissions available in many combinations and detail levels.
- Commissions may be reported by orders invoiced or based on payments received.

Finished Products

- These are not purchased but are made and sold.
- Single key to create buy in link to ingredient for non made product
- There are five pricing options and separate pricing units.
- You can set minimum stock levels by day.
- The manufacturing may be planned or on demand.
- Existing products may be simply cloned to facilitate entry of similar products easier.
- May be on multiple production groups.
- May be configured as a buy in product.
- Has a shelf life field.
- You can do a stock-take for bakery stock locations and at depots (hub) and stock carrying routes.
- The ability to transfer stock between locations.
- Ability to do graphical representation of sales.
- Has the ability to produce margin tables.
- Can set the Minimum and maximum order values.
- Has a 'Sell in multiples of ' option.
- Has multiple order entry options e.g. requires order comment, price fixed or variable at order time, may be forecast rather than using standing orders.



GlobalBake - Feature Groups (5)

FG - Purchasing:

- These are generated by supplier's standing orders from product reorder settings.
- Has order generate function and a recommended reorder report.
- They are still maintainable after generate.
- May be restricted to a preferred supplier.
- Various purchase order formats available, priced or un-priced.
- There are Inward goods sheets / receivers for unpacking and recording.
- Auto receive options to speed stock receipt – only change the differences.
- Links directly to A/P. in General Ledger.
- Stock may be receipted without an invoice and held pending but still in stock.
- Reports on Order outstanding, product outstanding, due orders etc.
- Full history kept of purchases by product by supplier.
- Cost variances report showing variations in purchase costs for product.

FG - Product Definition:

- The recipe system is core of manufacturing, pricing and nutrition analysis.
- Each recipe is able to draw ingredients, made up ingredients, products in process or finished goods.
- Each recipe has moisture loss and batch loss coefficients.
- Each recipe has overhead calculation
- Each recipe has man minutes for production scheduling and labour costing.
- Each recipe is linked to manufacturing department.
- Recipes are grouped by bake type.
- Each recipe may make as many different items as required. Uses bake units parameter on made item to determine ratios.
- A recipe may represent a process only e.g. bagging or creaming.
- From the finished goods a view of the recipe 'tree' will show links back to ingredients.
- Each recipe has optional batch information, minimum size, batch increment, maximum size and there are global batch construction parameters.



- **GlobalBake - Feature Groups (6)**

FG - Manufacturing:

- Has production group reports which may also be grouped into types for easier batch printing, user configured columns and options.
- Production report based on date range, and bake type range.
 - May use planned/requirements, requirements only, standing orders or forecast.
 - May include recipe details, required for list etc.
 - Has multiple print formats available.
- Can do production plans by week and day for bake type.
- Can do multiple production confirmations per day .
- Plan shows opening, made, required, planned, and closing.
- Has the ability to do scheduling by department, showing man minute estimates, scheduling by shift for department.
- Stock issues for production from store, report, generates issue.
- Confirmation by recipe, or ingredient of use options if no stock issue.
- Variances on actual stock used vs. theoretical.

Further reference to the above and on preceding pages can be found in the [GlobalBake on screen help](#).

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