MountainStream
AI Powered

Recipe Management & Production Planning

Automation & Forecasting

Inventory Management & Supply Chain Traceability

Nutrition Facts & Allergen Matrix

Streamline

https://MountainStream.co

Online Ordering

Finance

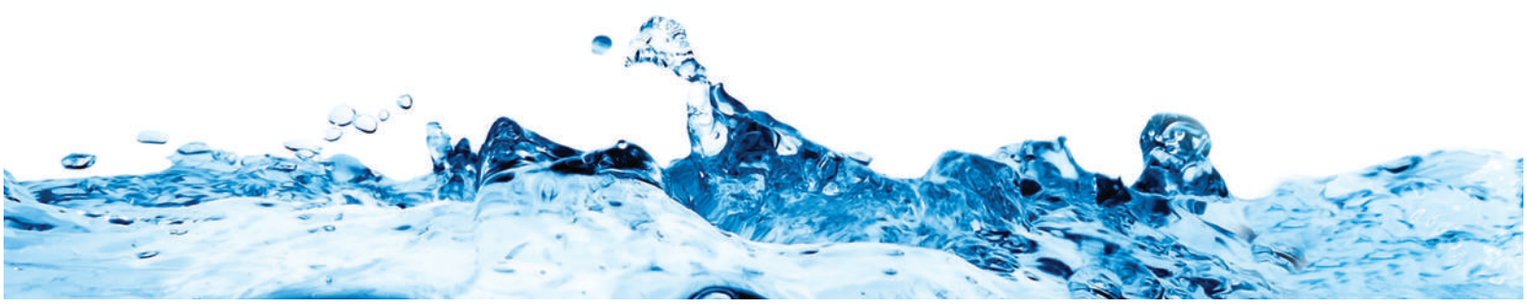
CRM

Distribution & Asset Tracking

Streamline Bakery Software

Used by bakers around the world since 2012

Revolutionize the way you run your business



1 Contents

Modules

Features

Custom Developments

If your business has additional requirements, we take great pride in ensuring that we understand and deliver a solution that addresses your needs.

Let's collaborate to create something that truly works for you.

Contact

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https://mountainstream.co

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We set up your data and teach you the program

Your customers (or you) manage orders online. All production and distribution reports are generated automatically, including invoices.

Drivers get all delivery information on their phone. Proof of delivery is instant, electronic and paperless. Sales data is exported to accounts.

Automate communication with customers whenever possible:

- Changes to orders
- Changes to item catalogue
- Overdue accounts, etc.

Streamline is designed to save you time:

Clean user interfaces are intuitive and minimize the learning curve.

Unlimited users with individual permissions allow access to the database anywhere, anytime, minimizing software / spreadsheet operator time.

Schedule reports to send by email; no need to log in. Print from a wireless printer. Save at least two weeks of work a year.

Clean, Honest Pricing

No Contracts. No Hidden Charges.

Prices published at https//:mountainstream.co/pricing

At Mountain Stream, we are harnessing the power of AI in design, coding, reporting, and automatically capturing purchase orders and vendor invoices in PDF, HTML and images.

Streamline is intuitive and easy to learn

Cyber Security

Your own database, not a common database shared by all clients of Mountain Stream.

Backups are made every fifteen minutes to changes to data and once a day for the full database.

Secure, real-time information and customer service 24/7

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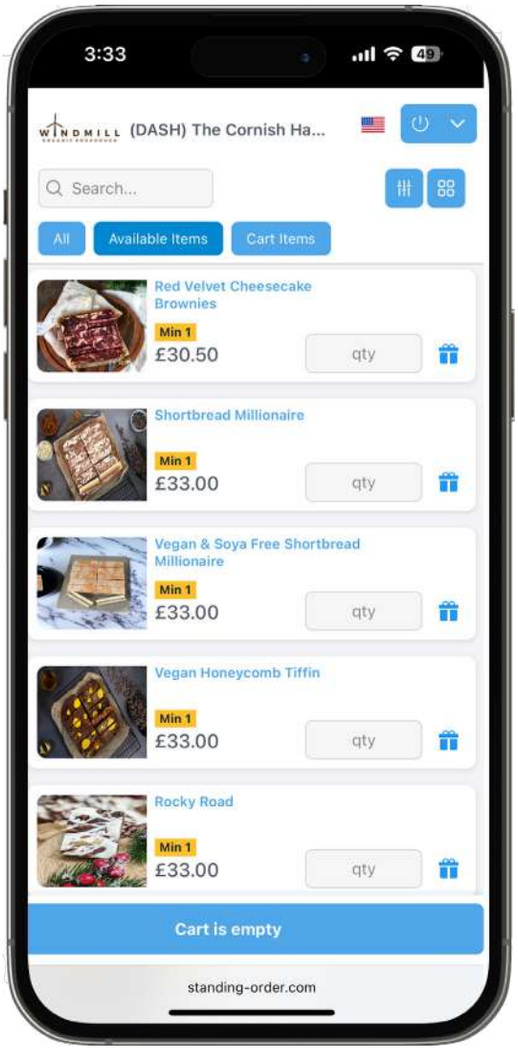
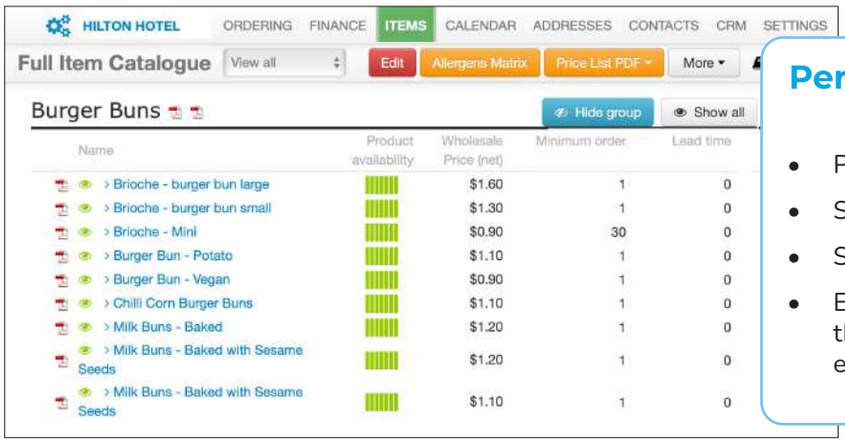
3 Customer Module



Self-Service Ordering

- Standing orders, also known as weekly, permanent or repeat orders
- Shopping cart for one off and amendments to standing orders
- Easy reordering
  - Save carts as templates
  - Load frequently ordered items
- Lightning fast, mobile ordering
- Interfaces designed for fast data entry
- Order deadline locks orders and respects product lead times

Loved by busy, demanding chefs



Personalized Item Catalogue

- Price list ready in PDF
- Set individual prices per item
- Show/hide individual item(s)
- Enter customer's own SKUs to display in their invoices and packing slips, making it easier to enter data to their system.

Invoices & Statements

4

- Invoice & credit note library
- Bank reconciliation in accounting instantly updates Streamline's A/R module: customers have up to date, live, self service statements
- Customer users may opt in / out to receive system emails, including invoices and statements

Payment Collection

Set the rules when to send statements and auto-collect via

stripe

Statement

Date Mon 08/09/2025

Windmill Bakery
112 West 4th Street
New York NY 10012

Amount Due $159.82

WINDMILL
ORGANIC SOURDOUGH

To:
Aidans Cafe
1055 W. Hastings St.
Vancouver BC V6E 2E9

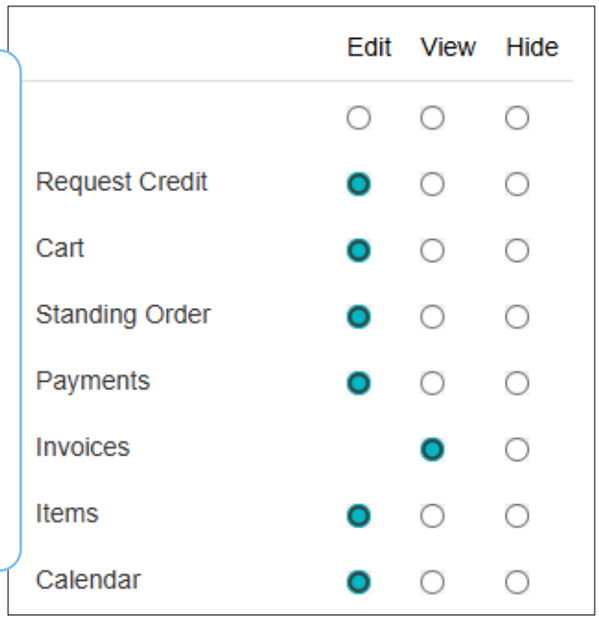
Date	Transaction	Due	Aging	Amount	Open	Balance
05/09/2025	INV 507736	06/09/2025	2	$159.82	$159.82	$159.82
08/09/2025	INV 507986	09/09/2025	0	$205.98	$205.98	$365.80

Total Open Balance $365.80

Total Open Balance	Current	1-30 Days	Amount due
$365.80	$205.98	**$159.82**	**$159.82**

Addresses & Contacts

- Unlimited user accounts
  - chef, manager, bookkeeper, etc
- User permissions: Edit / View / Hide
  - per page
  - per address
- Set specific delivery days and delivery charges, per address
- Save notes for driver on delivery
- Send invitations with tutorials to users.



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5 Customer Relationship Management

Built in CRM

Streamline has a built in CRM to help you manage:

- Sales leads
- Samples
- Customer and staff appointments
- Complaints
- Customer history

As you create events, Streamline autopopulates fields with data already in the system. You may also:

- Set reminders
- Share events with select colleagues

Connect your team and customers working together in one application

Samples

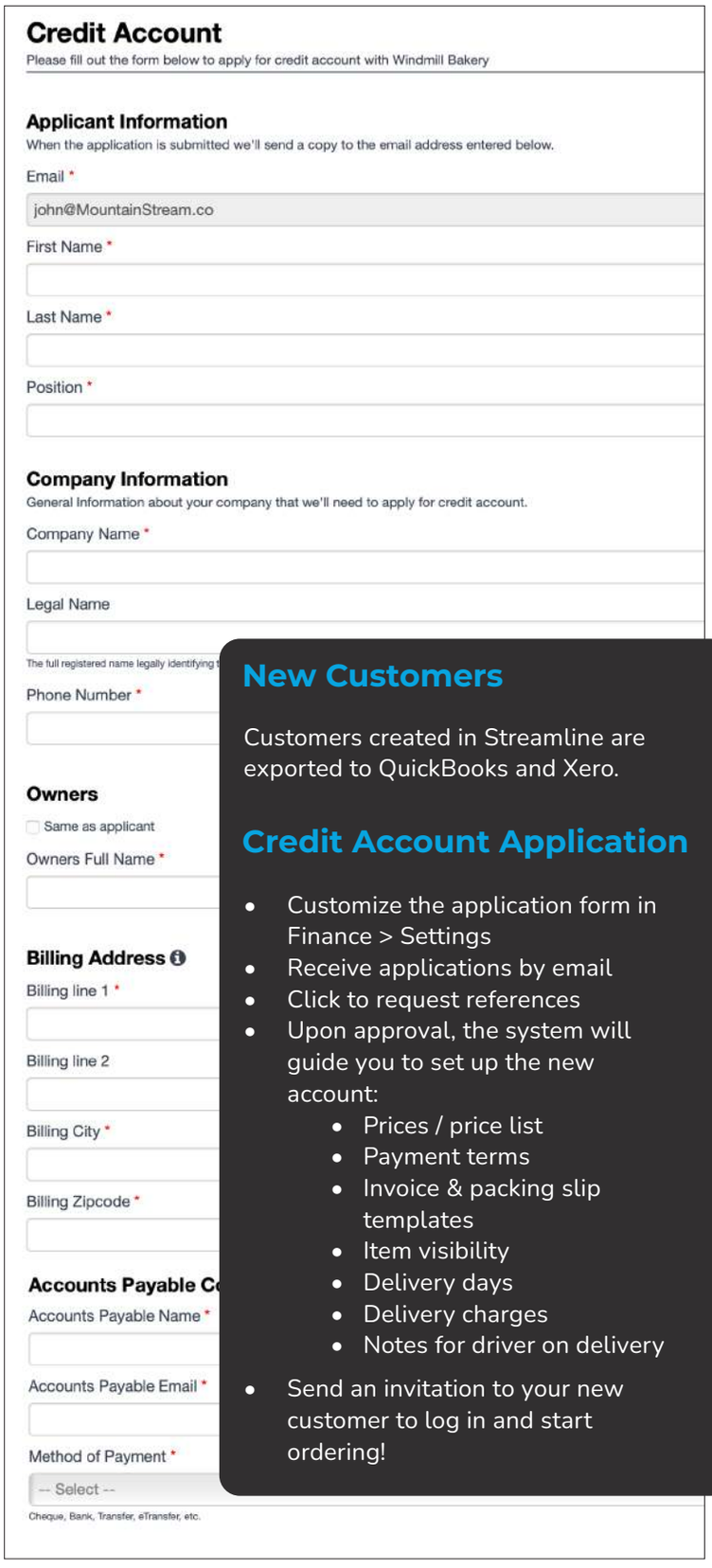
- Free of charge
- Sent from the shopping cart

Placing the order for samples automates

- Recording to the CRM
- Scheduling follow up emails and reminders, if no orders are received

System Emails

- Mass emails: filter customer list by attribute or delivery route, handy for communicating urgent messages when running late.
- User invitations include onboarding tutorials.



New Customers

Customers created in Streamline are exported to QuickBooks and Xero.

Credit Account Application

- Customize the application form in Finance > Settings
- Receive applications by email
- Click to request references
- Upon approval, the system will guide you to set up the new account:
  - Prices / price list
  - Payment terms
  - Invoice & packing slip templates
  - Item visibility
  - Delivery days
  - Delivery charges
  - Notes for driver on delivery
- Send an invitation to your new customer to log in and start ordering!

Sales Catalogue & Ordering

Items for the sales catalogue may be:

- Made in-house
  - Fresh to order
  - To stock in inventory
- Bought to sell
- Used as ingredients in recipes, for example, bread in sandwiches
- Made on select day(s) of the week

Prices & Price Lists

- The default price is always applied unless the customer has custom pricing
- Create unlimited price lists and attach them to multiple customers
- Price increases: Streamline makes it easy to adjust prices - set the percentage and apply. Option to email customers at the time of making the increase

Visibility & Templates

- Item visibility may be set by customer in their item catalogue and also by address
- Create unlimited visibility templates and attach them to multiple customers

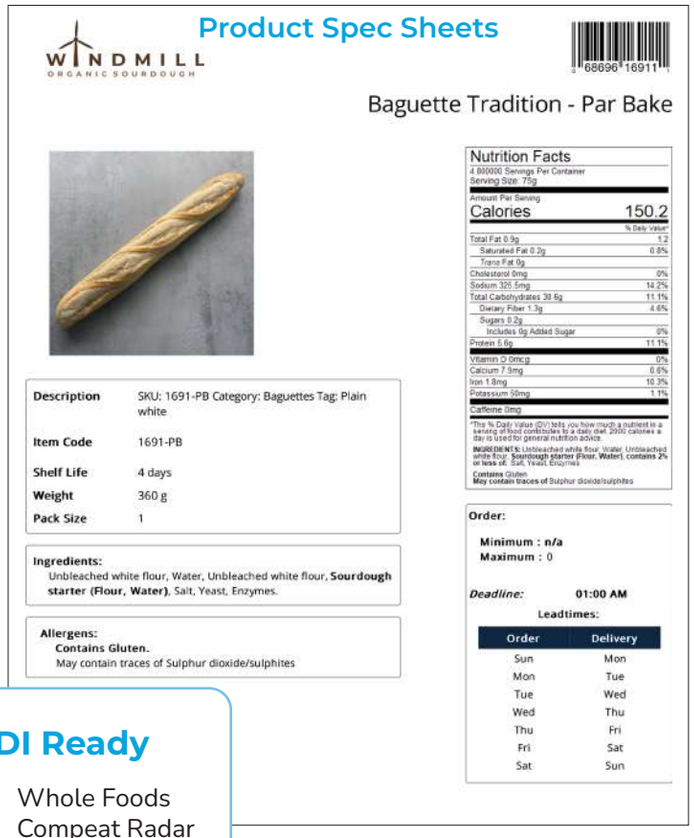
Seasonal Item Rules

- Create rules to make an item live / not live on given dates
- Attach rules to items
- Emails with dates are sent to customers
- Use for items made only at certain times of year

Ordering

- **Streamline CE** is our Chrome Widget that listens to orders in your inbox and automatically creates them in the system
  - PDF
  - HTML
  - Excel
  - CSV
- **Web & Mobile**
  - Standing Orders
  - Cart
- **Late Orders**: customers must call in to place late orders and only an administrator with the right permissions may enter them
- **Cancelling Orders**: use the customer calendar to cancel orders for a given period of time

Product Spec Sheets

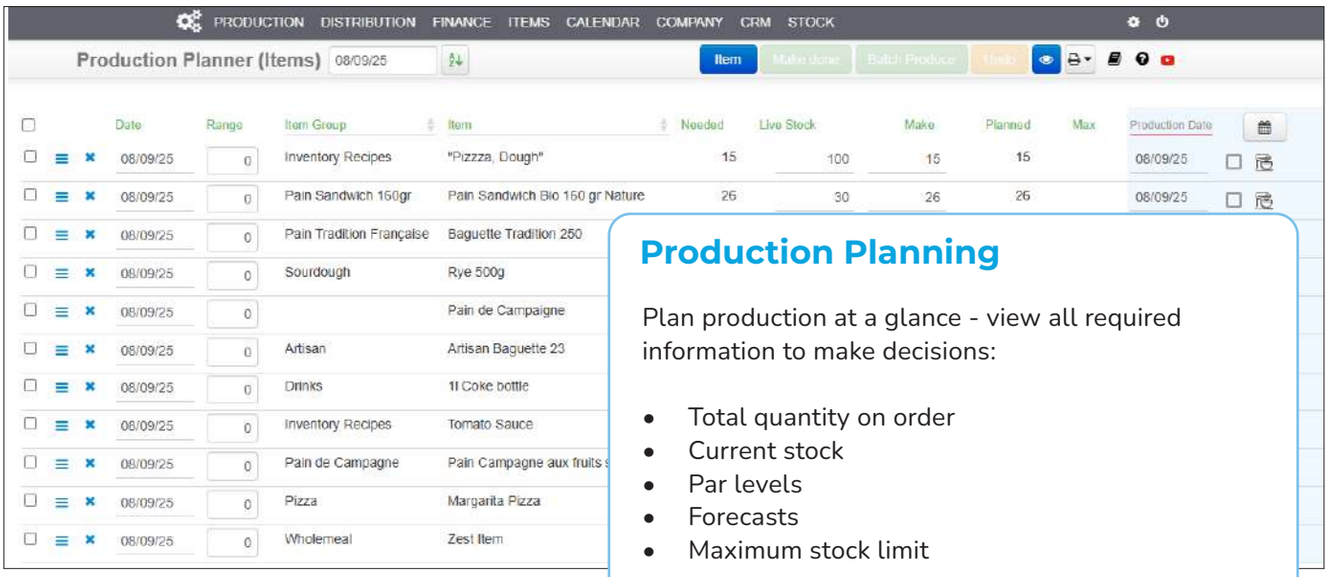


EDI Ready

- Whole Foods
- Compeat Radar
- Coupa

MountainStream

7 Production Planning



Production Planning

Plan production at a glance - view all required information to make decisions:

- Total quantity on order
- Current stock
- Par levels
- Forecasts
- Maximum stock limit

Set quantity, get recipe, mark done, update inventory, print labels.

Ingredients used are added to the shopping list. Traceability records are made.

Serving Size **UOM**

Nutrition Facts

1 Servings Per Container
Serving Size: 559g

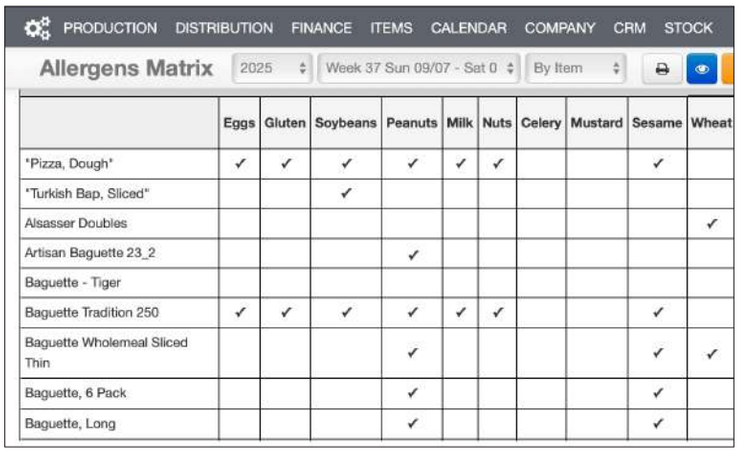
Amount Per Serving

Calories	**199.3**
	% Daily Value*
Total Fat 0.6g	**1%**
Saturated Fat 0.1g	**1%**
Trans Fat 0g	
Cholesterol 0mg	**0%**
Sodium 193,926.3mg	**8,432%**
Total Carbohydrates 42.3g	**15%**
Dietary Fiber 6.7g	**24%**
Sugars 0.7g	
Includes 0g Added Sugar	**0%**
Protein 6.9g	**14%**
Vitamin D 0mcg	**0%**
Calcium 135.9mg	**11%**
Iron 3.2mg	**18%**
Potassium 329.7mg	**7%**
Caffeine 0mg	

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2000 calories a day is used for general nutrition advice.

INGREDIENTS: Water test, AP flour, **contains 2% or less of:** Yeast

Contains Celery, Crustaceans, Eggs, Fish, Gluten, Lupin, Milk, Molluscs, Mustard, Nuts, Peanuts, Sesame, Soybeans and Sulphur dioxide/sulphites



	Eggs	Gluten	Soybeans	Peanuts	Milk	Nuts	Celery	Mustard	Sesame	Wheat
"Pizza, Dough"	✓	✓	✓	✓	✓	✓			✓	
"Turkish Bap, Sliced"			✓							
Alsasser Doubles										✓
Artisan Baguette 23_2				✓						
Baguette - Tiger										
Baguette Tradition 250	✓	✓	✓	✓	✓	✓			✓	
Baguette Wholemeal Sliced Thin				✓					✓	✓
Baguette, 6 Pack				✓					✓	
Baguette, Long				✓					✓	

Allergens and Nutrition Facts are taken from ingredients
Labels are generated from the recipe

Packaging

- Create Packaging “Recipes” and attach to multiple items
- Track costs and inventory

Recipe Management

8

Recipes

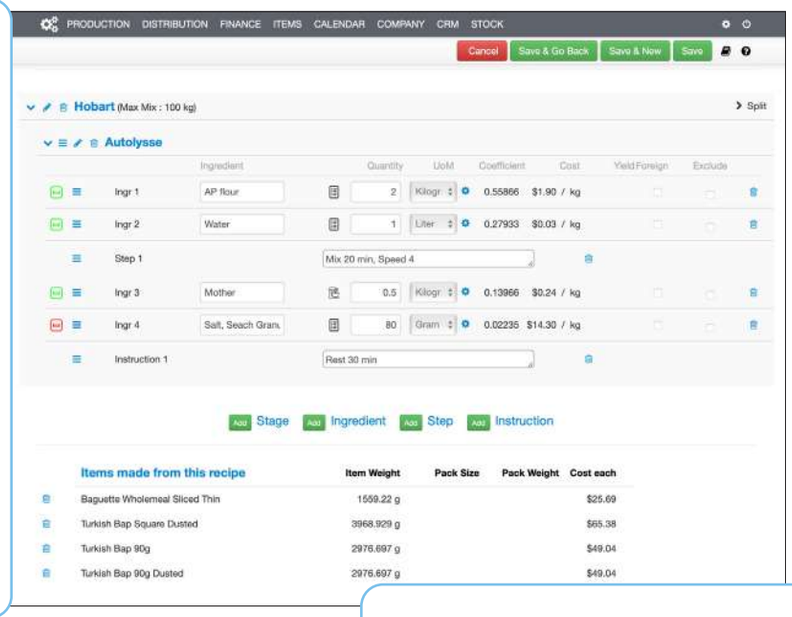
The Recipe Book is the catalogue of recipes.

There are three types ingredients:

- Raw Materials
- Sales Items
- Other Recipes

As you add ingredients to a recipe, the following are calculated:

- Costings
- Nutrition Facts
- Allergens



Recipe Card Templates

Configure unlimited templates and assign recipe by recipe.

Templates allow you to choose exactly what data to show and customize it exactly how you like it.

Pain De Campagne - by Distribution Date - Mon 09/08/2025

Total Mix : **18lbs**

1

Sign or enter the time the mix was made

Luck (max capacity 450lbs) 1 Mix total : 18lbs

1 Mix @ 18lbs each (18lbs)

Ingredients	Total	
1	3 lbs 12oz	Flour All Purpose
2	3 lbs 1oz	Flour Whole Wheat Coarse
3	10oz	Dark Rye
4	6lbs	Water
5	3lbs	Sourdough Starter (R)
6	1 lb 2oz	Poolish (R)
7	3oz	Sea Salt

Cut & Shape

Total	Item
18lbs	Pain De Campagne Oblong 24 oz - Sliced 1/2
18lbs	**Total**

List of recipes that use this recipe as an ingredient

2,697.072	g	Baguette Tradition 250 gr
545,671.176	g	Potato-111
548,368.25	**g**	**Total**

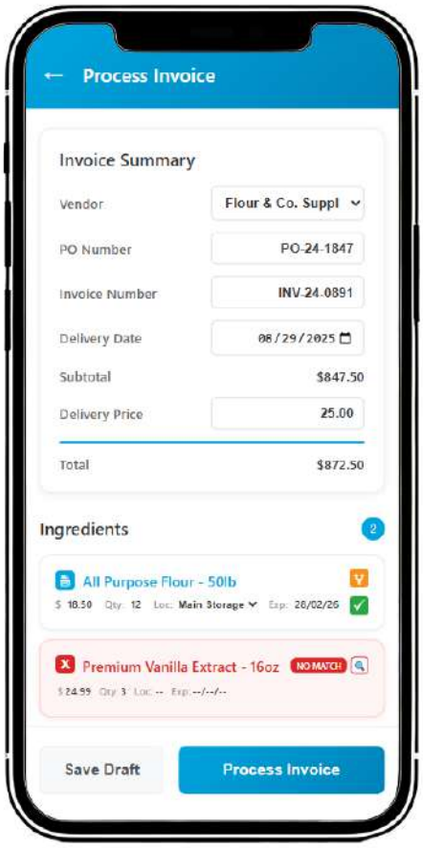
Recipe Cards

Recipe cards give the actual mix to be made.

When the quantity to make exceeds the capacity of the machine, recipes are split in multiple mixes.

When recipes or items are used as ingredients in other recipes, Streamline calls for those, respecting lead times.

9 Inventory



As you mark recipes done, inventory of ingredients used is depleted and replenished by adding to the Shopping List, which in turn becomes a Purchase Order when you review it and send it to your vendor.

Use the inventory app to receive goods, move inventory and mark recipes done. You may also make stock adjustments.

- Purchase and replenish
- Traceability
- Receive Goods
- Inventory
  - Move
  - Adjustments
- Print labels
- Make recipes & sales items

Inventory App

Goods in

- Scan purchase invoice:
  - Capture items, quantities and prices
  - Enter use by dates and delivery temperature, if needed
  - Streamline auto assigns lot #
  - Print barcode labels

Make prep recipes and sales items

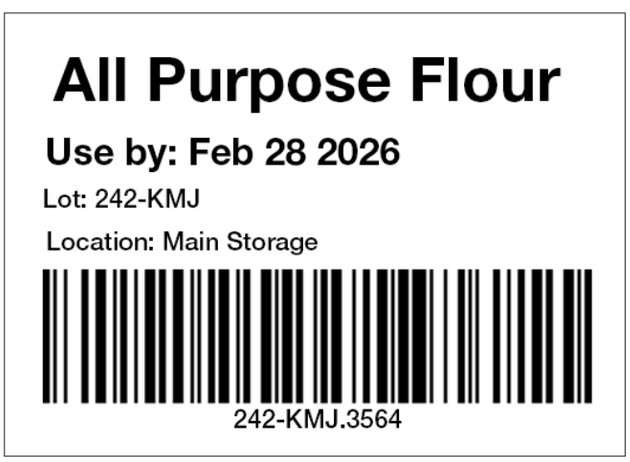
- Scan barcode labels as you add ingredients to:
  - make traceability records
  - deplete inventory
  - re-order

Stock count

- Scan barcodes as you take stock
- Next scan identifies previous as unopen
- Tap [¼] [½] [¾] [ ] to quickly enter quantity in open packs

Labels

- Print labels for goods in, prep recipes and manufactured sales items
- Labels identify location, use by date, lot # and purchase information.



Print labels via bluetooth to Zebra printer

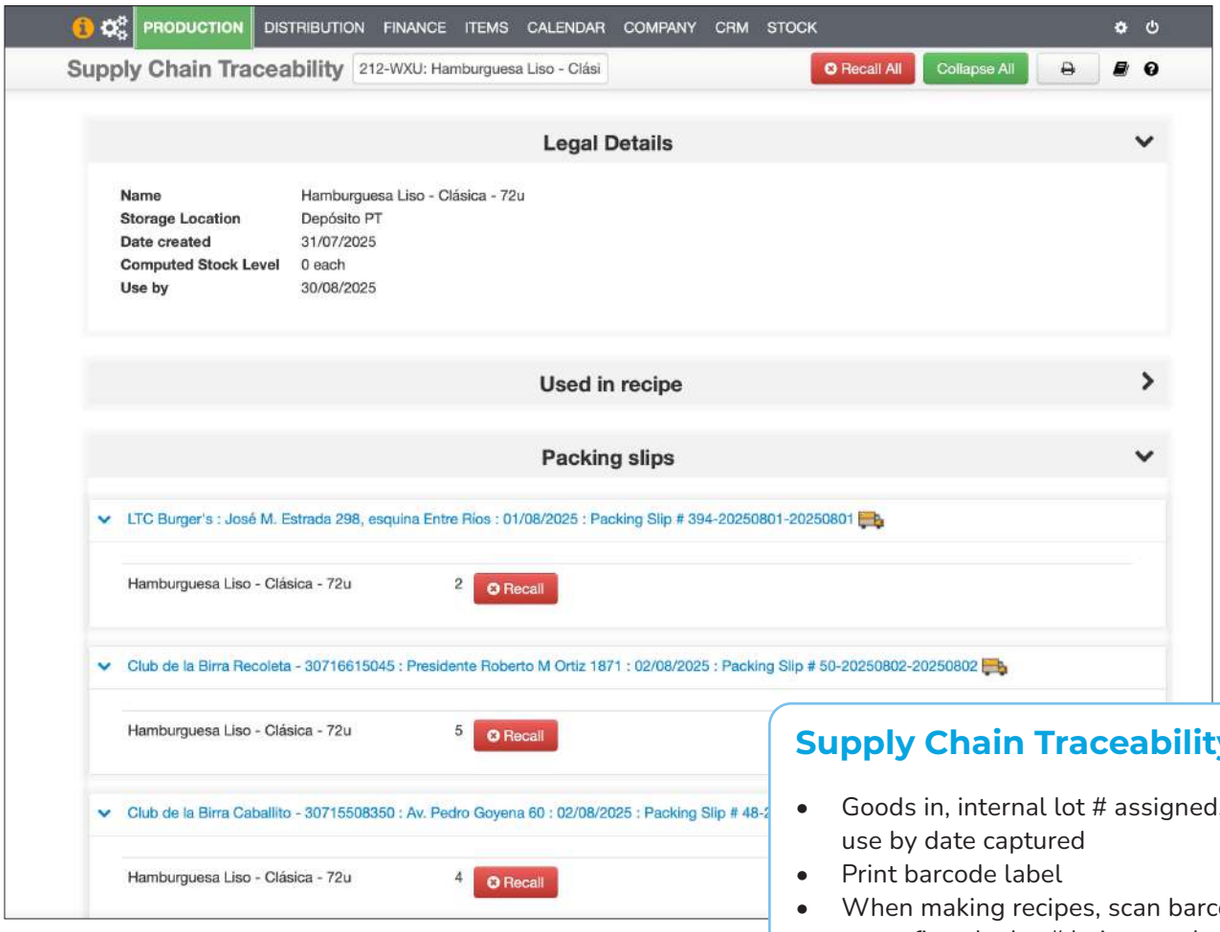
Supply Chain Traceability

Lot # Protocol

- Streamline generates all lot #s as follows: 123-XYZ, where 123 is the Julian date to easily identify the oldest lot # at a glance. XYZ are random letters
- Lot #s are related to the vendor's #s with the purchase invoice
- You may override the suggested lot # or we may configure your own protocol

Tracing Lot #s

- Amount and location in inventory
- Recipe lot #s where it has been used
- Packing slips that contain the lot # in question
- Recall button per slip, sends email
- Master "Recall" button to send a mass email to all



Supply Chain Traceability

- Goods in, internal lot # assigned, use by date captured
- Print barcode label
- When making recipes, scan barcode to confirm the lot # being used
- New lot # and label generated for the recipe or items made
- When dispatching, scan the address barcode and the items sent

MountainStream

11 Distribution

Optimize & Charge Deliveries

Streamline integrates with

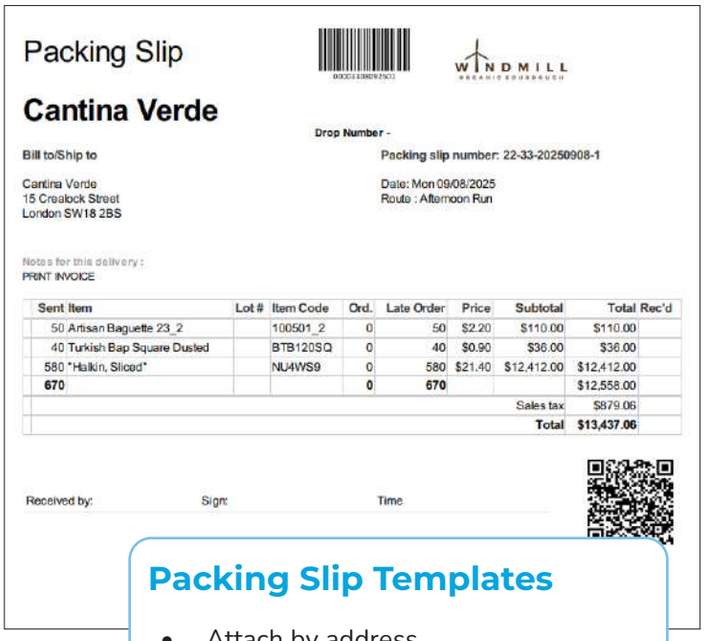
- OptimoRoute
- Detrack

Export > Optimize > Import

- Pick, pack and load truck in delivery order, saving driver time
- Batch print Packing Slips and Invoices in route order

Delivery Charging

- Set by address
- Unlimited rules: e.g.,
  - Invoice < $100, Delivery = $5
  - >$100 < $200, Delivery = $2
  - >$200, Free Delivery



Packing Slip

Cantina Verde

Drop Number -

Bill to/Ship to

Cantina Verde
15 Crealock Street
London SW18 2BS

Packing slip number: 22-33-20250908-1

Date: Mon 08/08/2025
Route : Afternoon Run

Notes for this delivery :
PRINT INVOICE

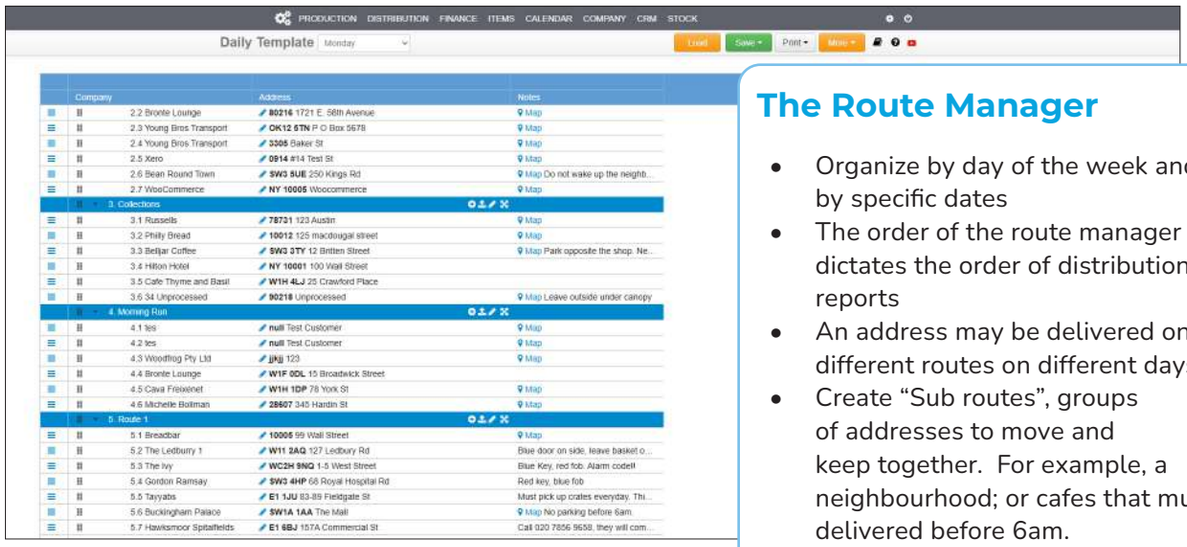
Sent	Item	Lot #	Item Code	Ord.	Late Order	Price	Subtotal	Total Rec'd
50	Artisan Baguette 23_2		100501_2	0	50	$2.20	$110.00	$110.00
40	Turkish Bap Square Dusted		BTB120SQ	0	40	$0.90	$36.00	$36.00
580	"Halkin, Sliced"		NU4WS9	0	580	$21.40	$12,412.00	$12,412.00
670				**0**	**670**			$12,558.00
							Sales tax	$879.06
							Total	**$13,437.06**

Received by: Sign: Time

Packing Slip Templates

- Attach by address
- Option to show customer's own SKU, entered in their item catalogue
- Notes for driver on delivery
- Show / hide prices
- Sort items in packing order
- Filter by item attribute

DETRACK



The Route Manager

- Organize by day of the week and also by specific dates
- The order of the route manager dictates the order of distribution reports
- An address may be delivered on different routes on different days
- Create "Sub routes", groups of addresses to move and keep together. For example, a neighbourhood; or cafes that must be delivered before 6am.

Streamline supports complex delivery charging, by address

Route Management & Optimization

Distribution App

Track & Trace

- One way packing
  - Use for delivery packaging that is only used once
  - Barcode label helps driver identify correct item on delivery
- Reusable Delivery Assets
  - Use one unique barcode per asset
  - Individually label each asset
  - Assign assets and items to the delivery address when packing
- PoDs
  - Confirm assets delivered, collected, and in customer's possession
  - Unlimited delivery pictures
- Accurate labor costings
  - Packing
  - Delivering

Proof of Delivery

Generated on 27/02/2024 at 09:06:15 AM

WINDMILL ORGANIC SOURDOUGH

Bill to
Mikolaj Nelder
KNBY LDN OP1< Ltd
1-3 Upper James Street
London W1F 9 DF

Bob Bob Ricard, BOB-20240227-0

Item	Item Code	Unit
Partbaked Baguette T Francaise 350g	101401	30
Item Sub Total		30

The following 2 trays were delivered today

	Barcode	Packed by	Delivery Note	Delivered by	Delivered at
1	100000000905	Paulina	BOB-20240227-0	Sherali	09:03:24 AM
2	100000003270	Paulina	BOB-20240227-0	Sherali	09:03:24 AM

The following 2 trays were picked up today

	Barcode	Delivery Note	Picked up by	Picked up at
1	100000000175	BOB-20240225-0	Sherali	09:05:42 AM
2	100000000113	BOB-20240225-0	Sherali	09:05:42 AM

You have 2 trays in your possession

	Barcode	Delivery Note	Packed by	Delivered by	Delivered on
1	100000000905	BOB-20240227-0	Paulina	Sherali	27/02/2024 at 09:03:24 AM
2	100000003270	BOB-20240227-0	Paulina	Sherali	27/02/2024 at 09:03:24 AM

Selling from the truck

- Real time inventory
- Invoices: create, print & email
- Credits: create instant credits for buybacks, scanning product barcodes

Instant, electronic paperless PoDs

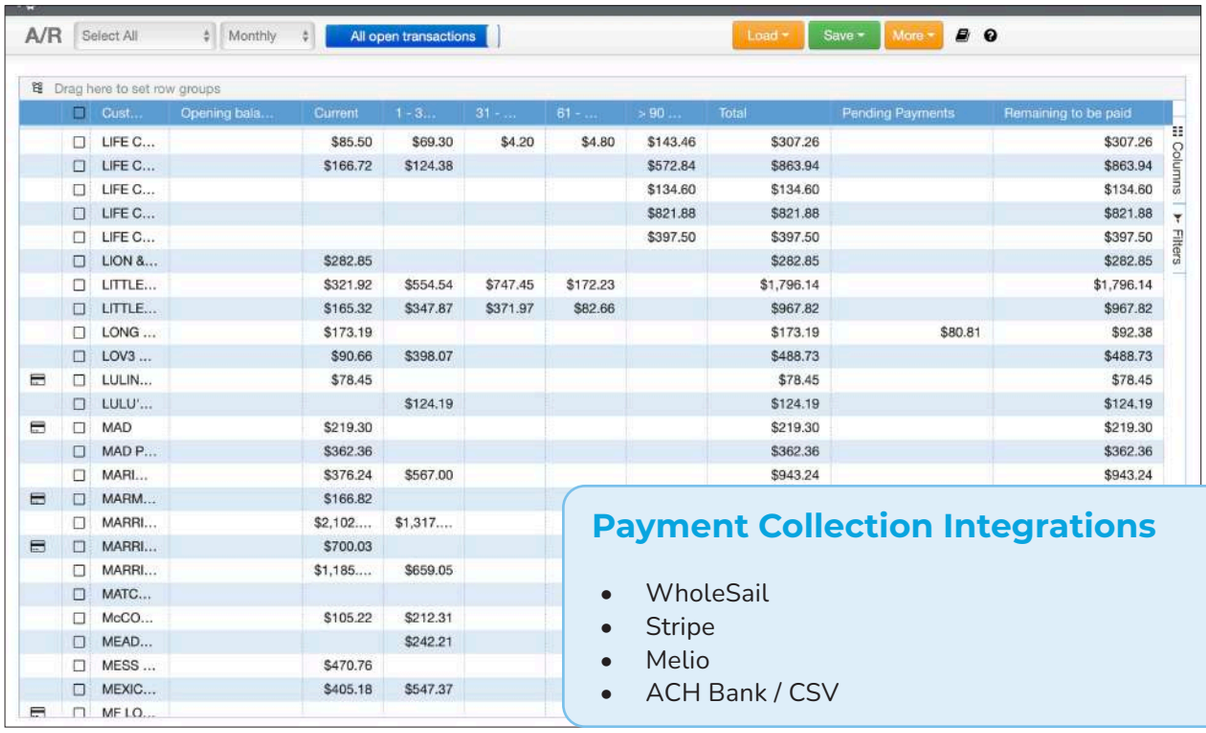
Pictures, Signatures, Geotags & Timestamps

PDF emailed to you and your customer

OptimoRoute

MountainStream

13 Finance



	Cust...	Opening bala...	Current	1 - 3...	31 - ...	61 - ...	> 90 ...	Total	Pending Payments	Remaining to be paid
	LIFE C...		$85.50	$69.30	$4.20	$4.80	$143.46	$307.26		$307.26
	LIFE C...		$166.72	$124.38			$572.84	$863.94		$863.94
	LIFE C...						$134.60	$134.60		$134.60
	LIFE C...						$821.88	$821.88		$821.88
	LIFE C...						$397.50	$397.50		$397.50
	LION &...		$282.85					$282.85		$282.85
	LITTLE...		$321.92	$554.54	$747.45	$172.23		$1,796.14		$1,796.14
	LITTLE...		$165.32	$347.87	$371.97	$82.66		$967.82		$967.82
	LONG ...		$173.19					$173.19	$80.81	$92.38
	LOV3 ...		$90.66	$398.07				$488.73		$488.73
	LULIN...		$78.45					$78.45		$78.45
	LULU'...			$124.19				$124.19		$124.19
	MAD		$219.30					$219.30		$219.30
	MAD P...		$362.36					$362.36		$362.36
	MARI...		$376.24	$567.00				$943.24		$943.24
	MARM...		$166.82							
	MARRI...		$2,102....	$1,317....						
	MARRI...		$700.03							
	MARRI...		$1,185....	$659.05						
	MATC...									
	McCO...		$105.22	$212.31						
	MEAD...			$242.21						
	MESS ...		$470.76							
	MEXIC...		$405.18	$547.37						
	MF LO...									

Payment Collection Integrations

- WholeSail
- Stripe
- Melio
- ACH Bank / CSV

stripe Wholesail melio

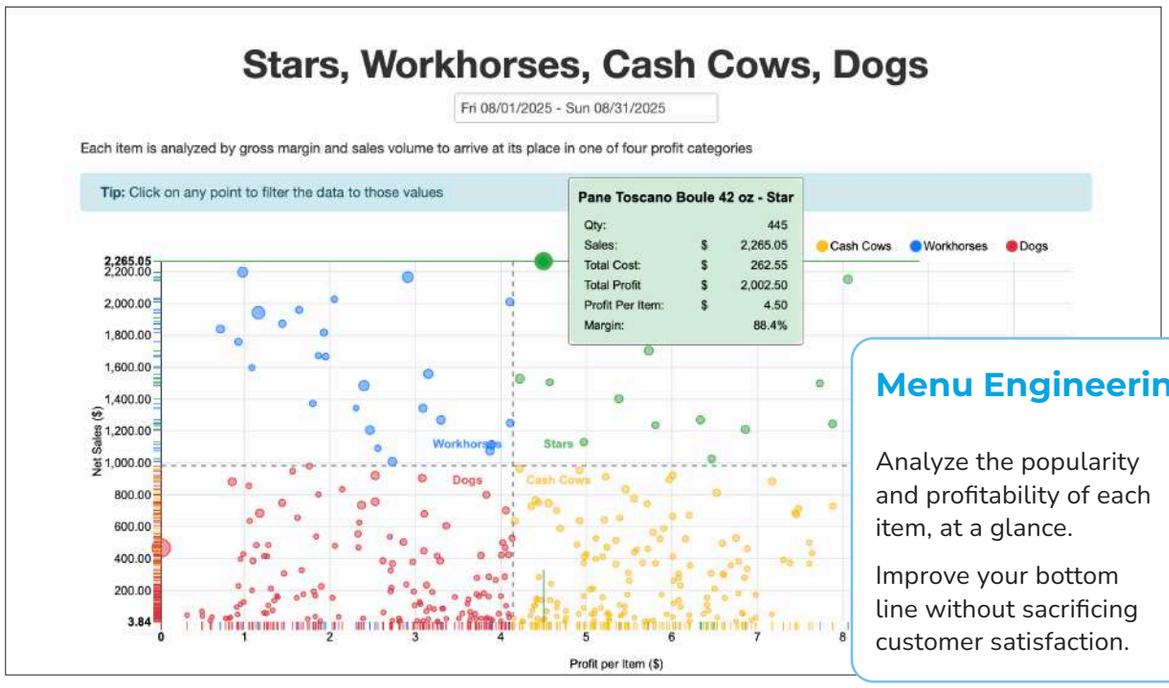
Automations

- **Credit control** - set limits and automate email reminders when an account becomes overdue or reaches credit limit
- **Accounts on hold -** when a customer exceeds credit limit or violates payment terms
- **Payment Collection** - set rules when to collect and from whom, Streamline takes cares of sending statements and collecting payment using your Stripe account
- **Published Invoices CSV -** configure a CSV to be sent by email when invoices are published. Import to other software or analyze in Excel

Accounts Receivable Module

- Invoices & Credits
  - Daily, Weekly or Monthly billing period, set by customer
  - Option to add card fees to select customer invoices
  - Batch multiple invoices in alphabetical or route order
  - Print or email batch in one click
- Statements

Every user action in Streamline is recorded to the Audit Trail, making it easy to trace changes to data



Menu Engineering

Analyze the popularity and profitability of each item, at a glance.

Improve your bottom line without sacrificing customer satisfaction.

Accounting Integrations

Connect seamlessly with Quickbooks Desktop, Quickbooks Online and Xero.

- Export sales invoices & credits
- Export/import: items and customers
- Import payments (via automatic webhook). *Bank reconciliation in accounting instantly updates Streamline's A/R module: customers have up to date, self-service statements*
- Export sales ledger to Sage, MYOB, Surf, Microsoft Excel and many more
- Mark contacts to receive invoices and all financial emails, for example, bookkeeper and / or accountant

Settings

Settings in Streamline may be set generically and overridden at address or customer level.

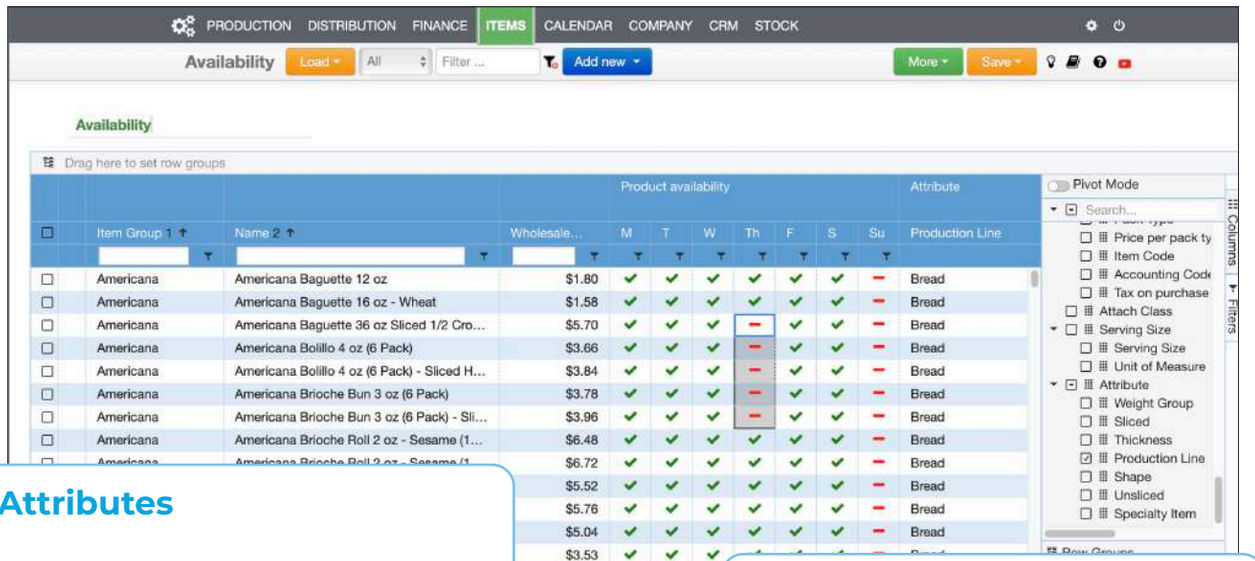
Order Minimum Settings

- Generic order minimum: below this, no orders are accepted
- Minimum for delivery: below this minimum, orders are held for pick up
- Minimum by item quantity

Customer Settings

- Paperless billing
- Daily, weekly or monthly billing
- Do not generate invoice (e.g., in-house orders)
- Custom pricing
- Custom discount rules
- Customers with multiple delivery addresses:
  - One invoice per delivery or
  - Consolidate all deliveries to one invoice.

15 Flexible Data Structure



Attributes

Attributes are columns of data added to

- Item Catalogue
- Customers
- Customer Addresses

They enable filtering, grouping and structuring reports.

You may add unlimited attributes to any list.

For example, create a column named "*Production Line*" and assign items to the relevant department.

Another column in the same list would allow creating different reports, for example "*Slicing*" (by thickness) or "*Bagging*" or "*Packing*" and so on.

Customer attributes may be used for classifying sales, for example, restaurant, caterer, hotel, etc, or to organize and prioritize production shifts, or to filter labels required.

The options are endless and the flexibility allows you to create any report you need.

Imagination is the limit.

Batch Edit

Batch Edit is available for:

- Sales Catalogue
- Ingredients
- Customer Settings
- Customer Addresses
- Address Delivery Days

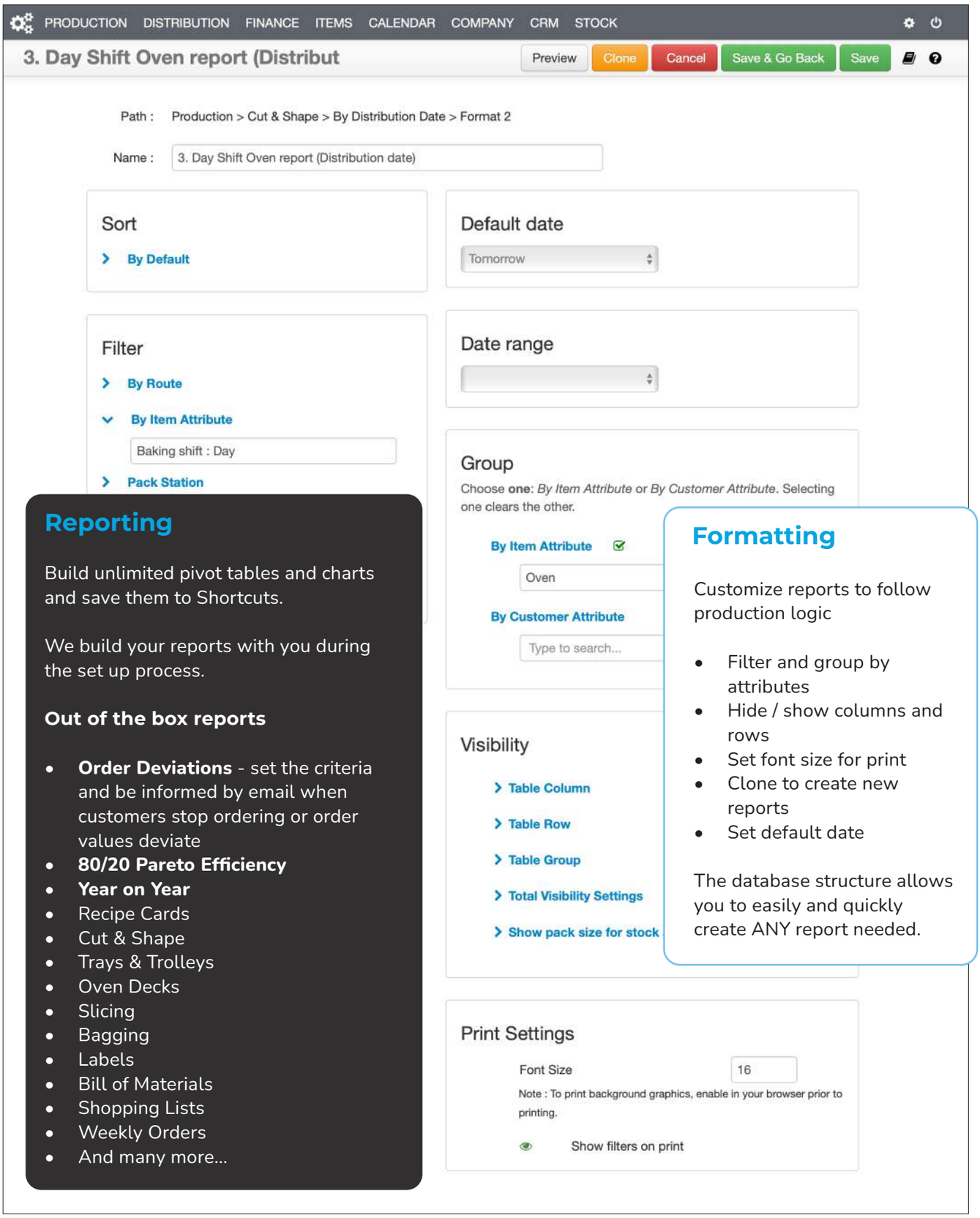
It allows editing your lists in spreadsheet mode, meaning that you may copy, paste, and edit the complete list without having to open each record individually.

Game Changer!

Automations

- Send daily production and distribution reports at the time that they are needed
- Sending statements
- Collecting credit card payments
- Sending sales reports and other CSVs

Reporting Architecture



Reporting

Build unlimited pivot tables and charts and save them to Shortcuts.

We build your reports with you during the set up process.

Out of the box reports

- **Order Deviations** - set the criteria and be informed by email when customers stop ordering or order values deviate
- **80/20 Pareto Efficiency**
- **Year on Year**
- Recipe Cards
- Cut & Shape
- Trays & Trolleys
- Oven Decks
- Slicing
- Bagging
- Labels
- Bill of Materials
- Shopping Lists
- Weekly Orders
- And many more...

Formatting

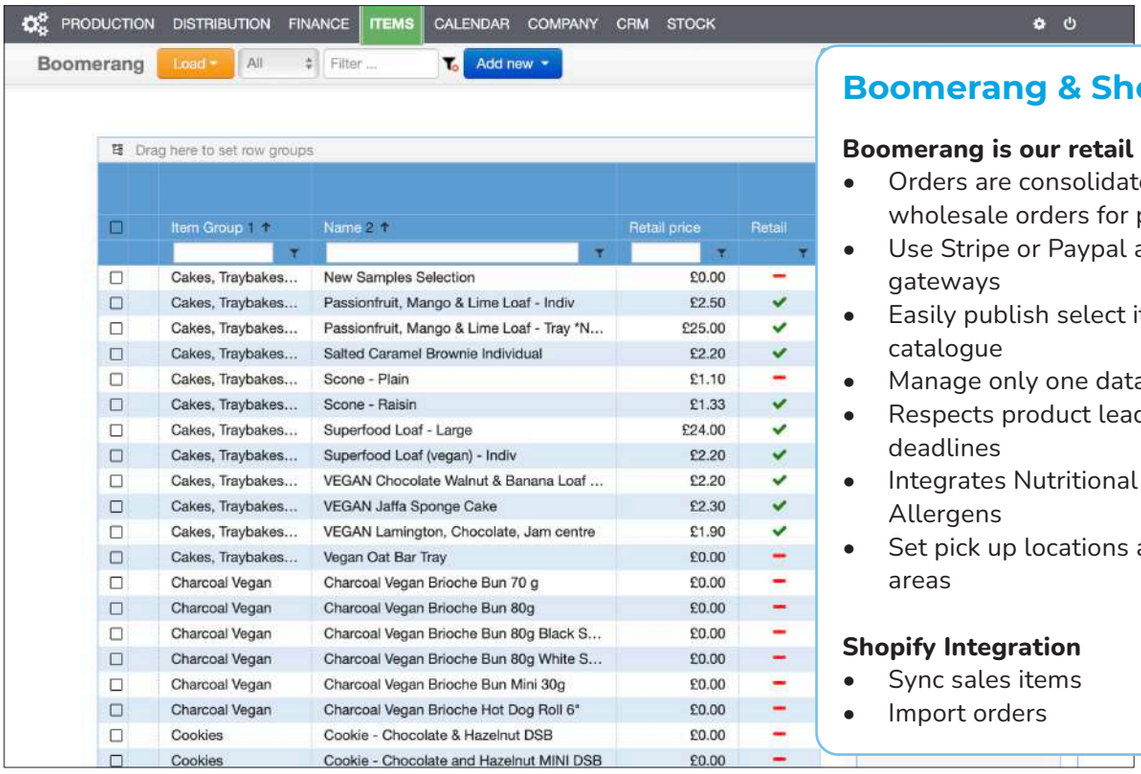
Customize reports to follow production logic

- Filter and group by attributes
- Hide / show columns and rows
- Set font size for print
- Clone to create new reports
- Set default date

The database structure allows you to easily and quickly create ANY report needed.

MountainStream

17 Boomerang & Shopify



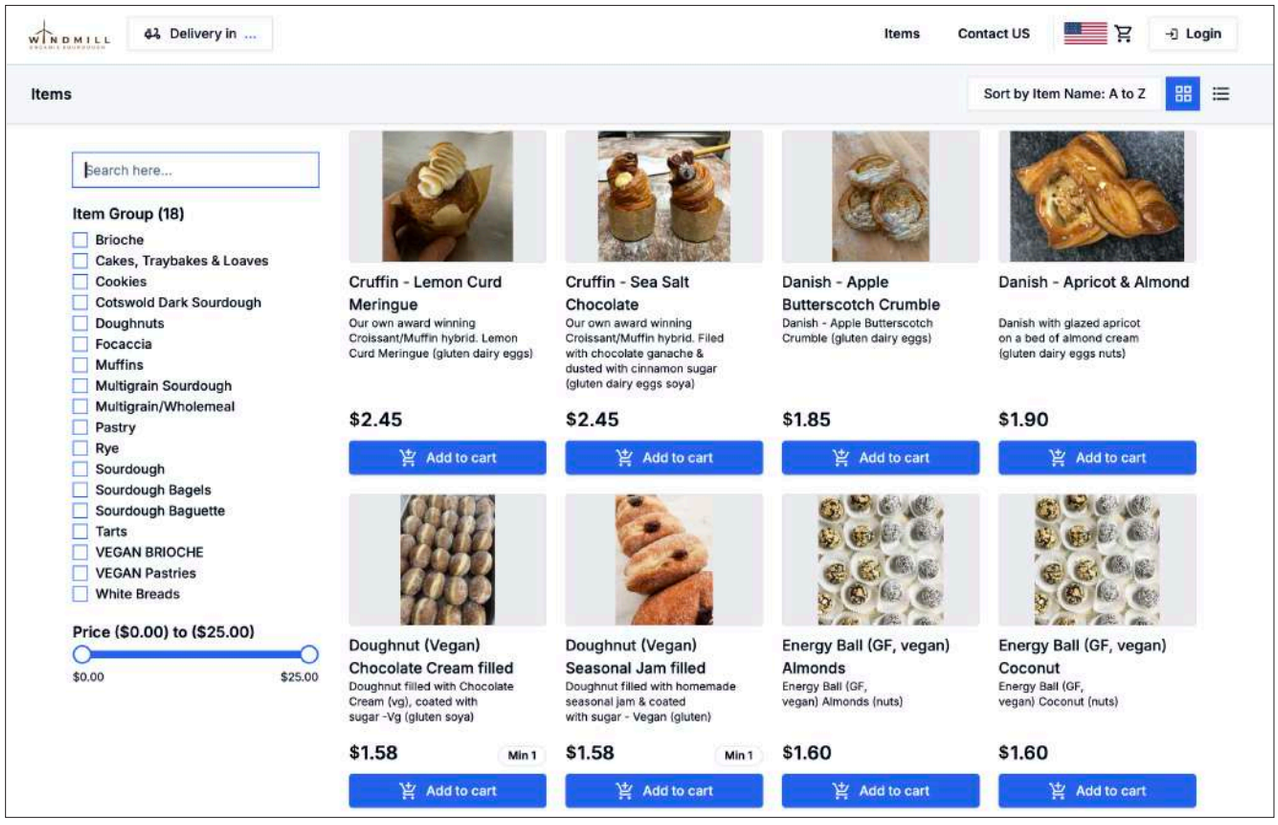
Boomerang & Shopify

Boomerang is our retail shopping cart

- Orders are consolidated with wholesale orders for production
- Use Stripe or Paypal as payment gateways
- Easily publish select items from the catalogue
- Manage only one database
- Respects product lead times and deadlines
- Integrates Nutritional Facts and Allergens
- Set pick up locations and / or delivery areas

Shopify Integration

- Sync sales items
- Import orders



Standard Operating Procedures

Standard Operating Procedures

- Easily create, maintain and update your SOPs, and store them in the relevant page
- SOPs are step-by-step instructions to help workers carry out routine operations
- A great tool for training new staff and ensuring that every point is covered and never forgotten
- Achieve efficiency, quality output and uniformity of performance while reducing miscommunication and complying with industry regulations

Enseñamos y atendemos
Streamline en Español 24/7

ABOUT US

Mountain Stream was founded in 2012 to harness the power of the internet and improve the efficiency of wholesale bakeries.

Founder & CEO Axel Bergstrom had a successful career in catering before joining a wholesale bakery to assist in getting the house in order.

The result was the seed that grew into Streamline.

The company has grown steadily and organically into a team of over 30.

Our clients are among the most prestigious in the world and we cater to both, the artisan baker as well as the larger plant bakeries in the US, Canada, Europe, Australasia and Latin America.

We have created a flexible and intuitive system in tandem with our clients.

Once a week, for the welfare of the team, we engage in outdoor sports. We play chess, daily, in the office.

We are friends of the earth and we care about the environment. We cycle. We recycle.

We are charitable. We support the Real Bread Campaign and connect bakeries and local charities around the globe.

MountainStream

Reviews

Capterra 4.8

Software Advice 4.8

★★★★★

Daniela C.
Tartastic

This software saved my life in a time where my business grew exponentially.

We put in the time to get it up in running rather quickly, I have wondered why I didn't do it sooner.

If there are any glitches, questions, concerns, software modifications, anything I need customer support on, I have always been able to reach help quickly and efficiently. It's incredible to reach a person that speaks your language and understands your business and its needs.

★★★★★

Jay S.
French Press Bakery & Cafe

"Efficiency and accuracy at its best! The developers really understand our business."

Over the course of six months we reviewed multiple systems but one stood out above and beyond the rest: Streamline by Mountain Stream.

The system is intuitive and easy to navigate. We spent lots of hours stress testing it, to ensure it not only met our current demand, but also future requests. We pushed it to the limits.

Gone are the manual entry errors, maintaining Excel links to ensure the numbers propagate, the hand written notes for delivery.

Gone are simple mistakes that drove us crazy.

Mountain Stream is a must for anyone wanting to reduce waste and optimize the order to fulfillment process.

★★★★★

Mathieu C.
Gaston's Bakery

Streamline is truly fantastic and a very important tool.

The value for money is excellent — it saves us time every day and reduces the chance of mistakes.

Customer support is responsive and always willing to help, which makes a huge difference.

The platform is easy to use and our team was able to get up and running quickly.

Highly recommend Streamline to any bakery or food business looking to improve efficiency.

Add **instant value** to your business through cost savings, better service and improved customer *and* staff satisfaction.

MountainStream

cutting edge, cloud-based Bakery Management Software