

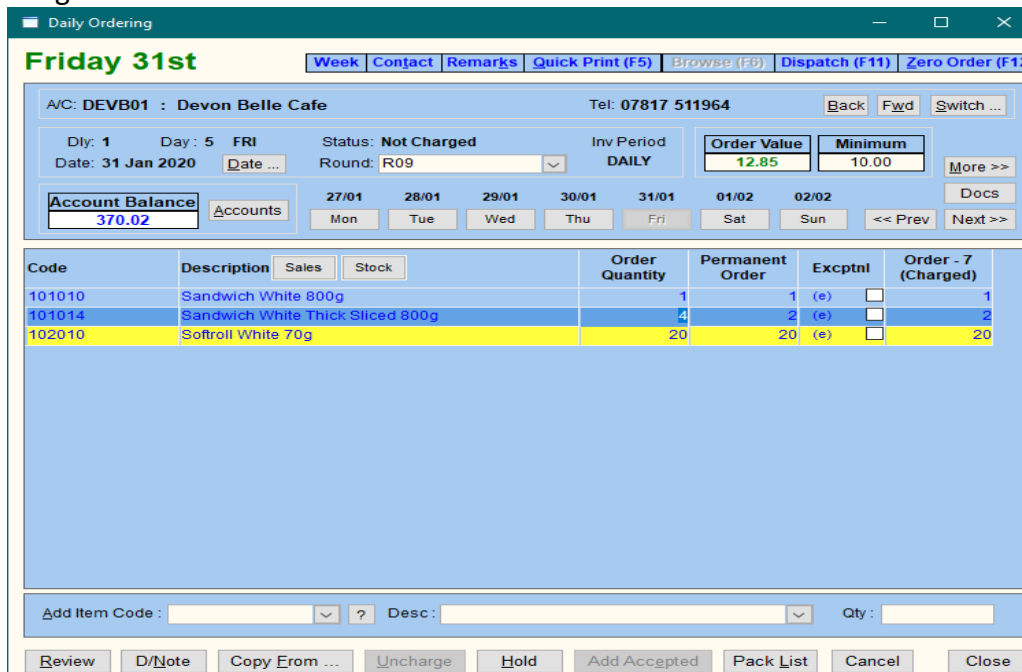
Ref: Additional features added (you may need an update to activate)

1. New features in the standard Daily Order Screen Header
2. New feature to highlight Special Prices in Yellow (can be turned off)
3. New facility to invoke a specific Customer message
4. New report to show Order changes and Cancelations
5. New option in the EDI Import screen to merge
6. New Packing List facility to show the parent boxed items and then break out its contents
7. New Round Packing List S0008 to display Temporary Customers address on the Report. Format S0007 Shows all customers

The standard Daily Order Screen now shows **GREEN** text (in the top left corner) if the order date is the next day, any other date and the text will be **RED**

Changing Daily Order Date by clicking on one of the radio DAY buttons to swap order dates e.g. Mon Tue Wed etc. By clicking **NEXT** to the left of the DAY buttons the order screen jumps to the **MONDAY of next week** see Fig 3. Note the Day / Date in the top left will be **RED TEXT** as a warning. If you then click **Previous** the screen reverts to Fig 1. being tomorrow or the default next working day. (please note Merit cannot be held responsible if staff continue to enter orders for an incorrect day/date)

Fig 1.



Any product price NOT being the Standard Price or an alternative Price Table will be deemed a Special Price and as such will be displayed in the Standard Order Screen with a YELLOW line identifying this fact “that its SPECIAL”.

If & when you change an order quantity the line highlights in dark blue to identify the change, the same happens for Special Priced products, or when a product is flagged as Seasonal e.g. Green highlighted line but if you charge the quantity it goes dark blue.

You’ve always had the ability to click **WEEK** in the top left of Fig 1. it pops Fig 2. being the Orders by Week Screen, by design it does not allow you to make changes to charged orders, hence the modifications to add the Day Radio Buttons to the standard Daily Order Screen shown in Fig 1 & 3.. Which will allow Uncharging / Ammendments.

Fig 2.

Orders By Week

Export Contact Remarks Help

Customer : ALBS01 Albany Stores Switch ...

Address : Kings Row TN24 6SE Delivery : 1  
Phone : 987654321 Fax : W/E Date : 02 Feb 2020 Date ...

Add Item: Select ... [a] [z] ? Go C / I = Charged/Invoiced \* = Permanent Order Current Item :-  
H / L = Held/Locked e = Exceptional Order Permanent

Stock ID	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun
101010	Sandwich White 800g	6*	5*	10*	6*	0	0	0

Order Numbers GRN Numbers  Move Down After Update (Use + or - on number pad to move) Close

Check out: [Sales & Stock](#) buttons, to the right of Description shown in Fig 1. & 3.

Fig 3.

Code	Description	Sales	Stock	Order Quantity	Permanent Order	Excpntl	Order - 7 (Charged)
101010	Sandwich White 800g			1	1 (e)	<input type="checkbox"/>	1
101014	Sandwich White Thick Sliced 800g			4	2 (e)	<input type="checkbox"/>	2
102010	Softroll White 70g			20	20 (e)	<input type="checkbox"/>	20

If for any reason you do not want to highlight the Special Prices the YELLOW can be turned off, see Fig 4 below

Fig 4.

Fig 5. Displays Sales

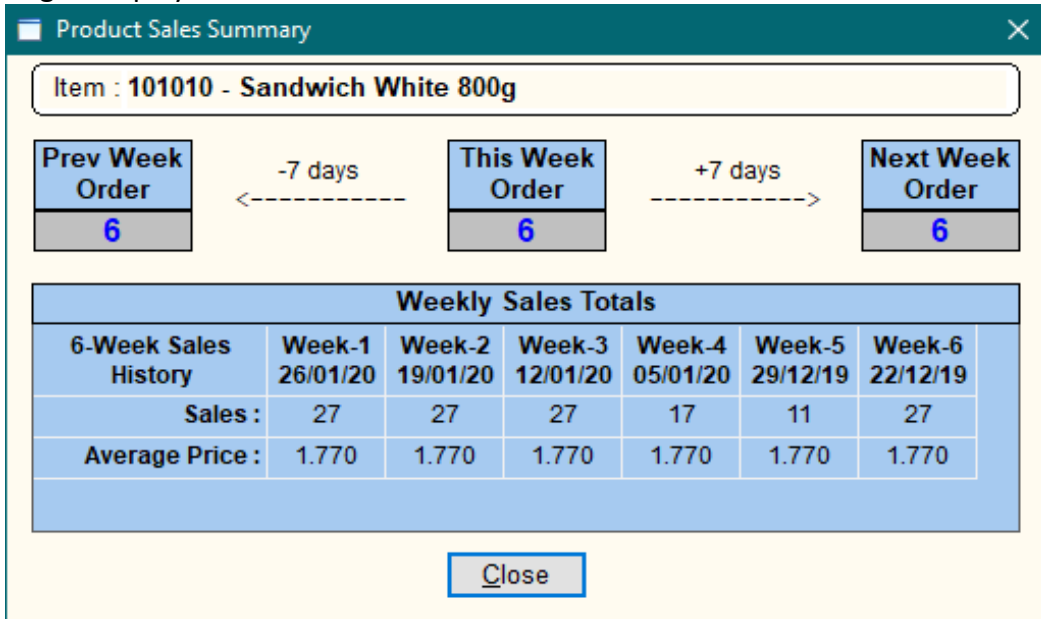
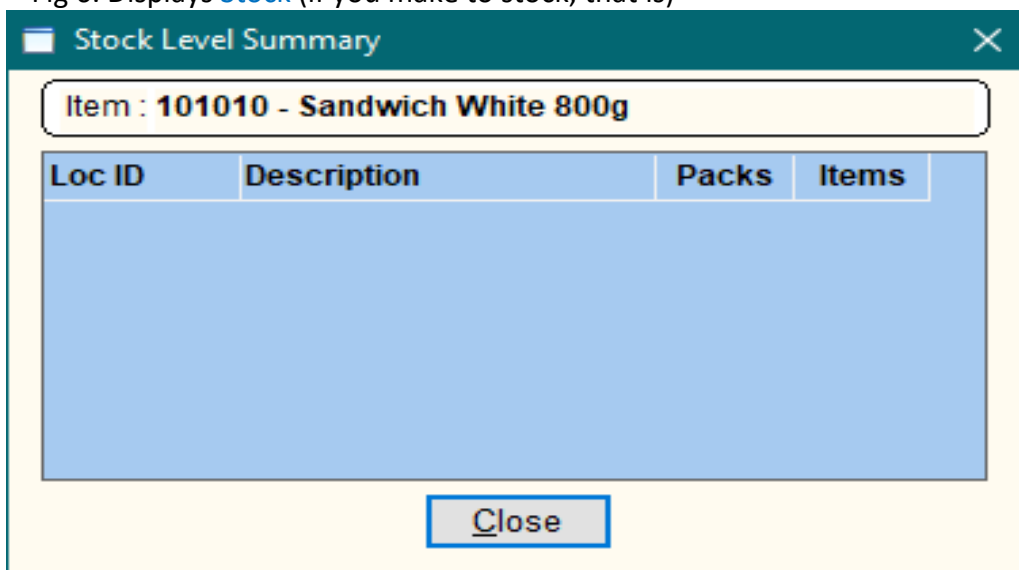


Fig 6. Displays Stock (if you make to stock, that is)

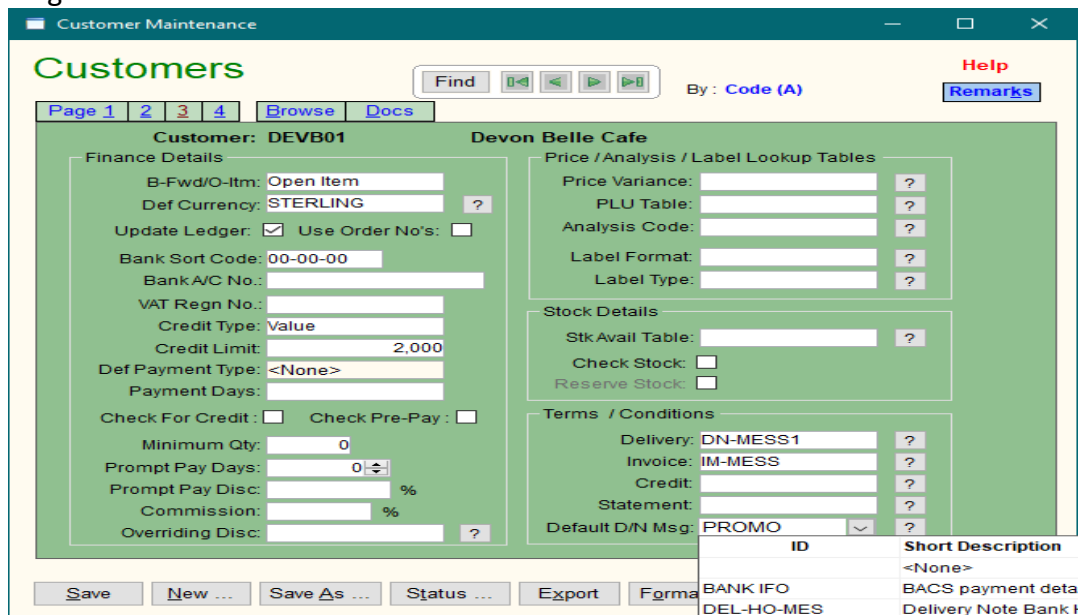


**Customer specific message**

You've always had the ability to set a One-time (next delivery only) message from the MORE screen, top right of Fig 1. & 3. The message only held for the next delivery, now it holds for every delivery **UNLESS overridden** by you selecting a message from Delivery Note Options screen (higher priority).

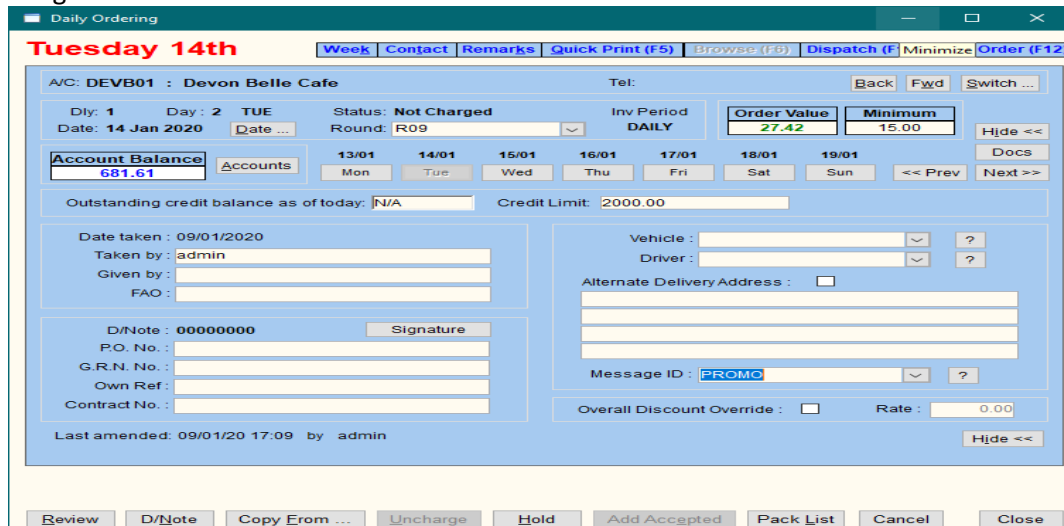
Go to Customers / page 3 / select, or create a default message for the chosen customer and save. The message can be anything e.g. wrap all items or deliver before 6am etc. etc.

Fig 7.



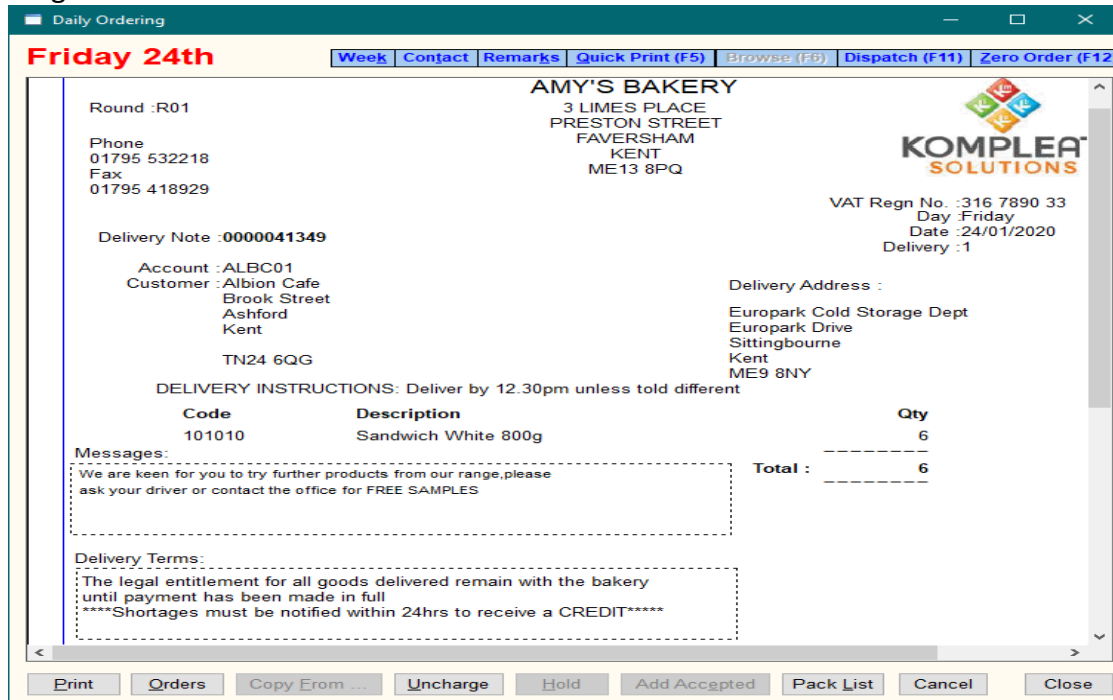
As stated, by clicking MORE (top right) of Fig 1. & 3. you get the second page pop; you can now select the message ID example **PROMO** see Fig 7. Click HIDE to revert to page 1

Fig 8.



Most formats as you know will allow up to 4 lines for Messages and up to 4 lines for Terms and Conditions.  
 See example in Fig 9. below.

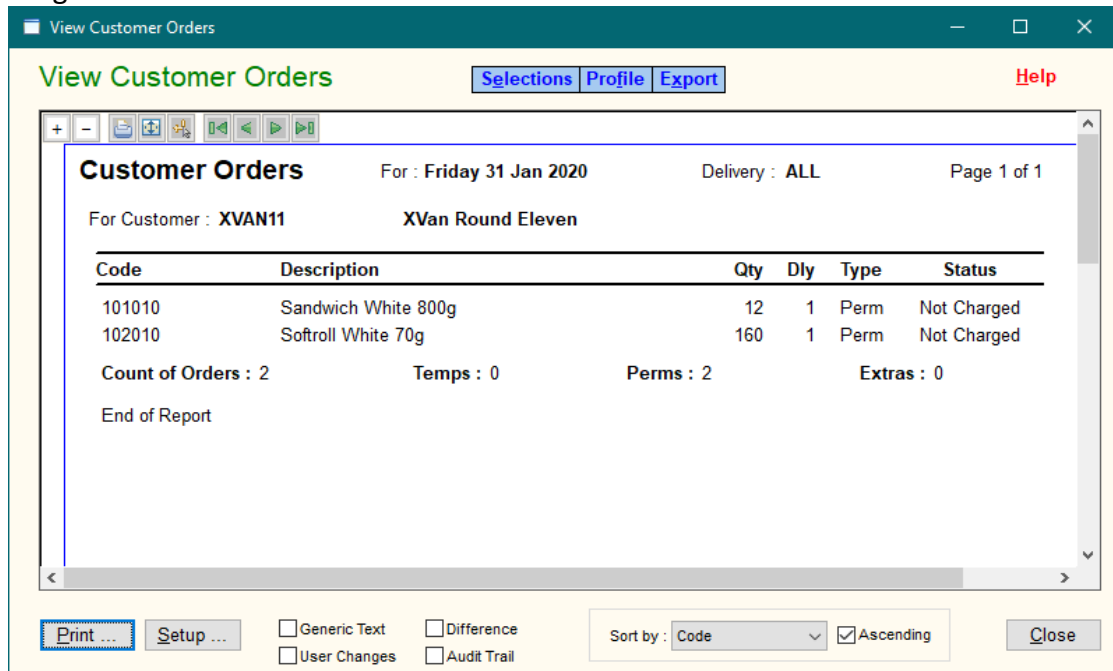
Fig 9.



**New Reports to show where an original Order has been changed**

First go to: Ordering / View Customer Orders / select Delivery / Date / Enter any Customer ID Fig 10. Pops displaying its status

Fig 10.



Notice in the footer of Fig 9. Four radio buttons Generic Text / Differences / User Changes / Audit Trail

By ticking any of the radio buttons the report is filtered to only show changed orders.

Tick: User Changes / select User Changes / select Customer Range

Fig 11.

**View Customer Orders** [Selections] [Profile] [Export] [Help]

**Customer Orders** Page 1 of 1

Customers selected by : Code  
From : ALBC01  
To : ZCOOP03

Customer : ALBS01 - Albany Stores  
Order Date : 31/01/2020  
Delivery : 1

Action	Status	Order Value	Date/Time Modified	User
NEW	UNCHARGED	0	22/01/2020 16:07:35	admin
CHANGED	UNCHARGED	0	22/01/2020 16:28:07	admin
CHANGED	UNCHARGED	2.68	30/01/2020 10:04:25	admin

Print ... Setup ...  Generic Text  Difference  User Changes  Audit Trail Sort by : Code  Ascending Close

By re selecting Audit Trail you get Fig 11. Which will

Fig 12.

**View Customer Orders** [Selections] [Profile] [Export] [Help]

**Customer Orders - Audit** For : Friday 31 Jan 2020 Delivery : ALL Page 1 of 1

For Customer : DEVB01 Devon Belle Cafe

Code	Description	Qty	Price	Dly	Type	Date / Time	User	Status
101010	Sandwich White 800g	1	1.77	1	Perm	30/01/2020 10:05:17	admin	Created
101010	Sandwich White 800g	4	1.77	1	Temp	30/01/2020 10:37:22	admin	Changed
101014	Sandwich White Thick Sliced	2	1.77	1	Perm	30/01/2020 10:05:17	admin	Created
101014	Sandwich White Thick Sliced	4	1.77	1	Temp	30/01/2020 10:10:15	admin	Changed
102010	Softrroll White 70g	20	0.28	1	Perm	30/01/2020 10:05:17	admin	Created
102010	Softrroll White 70g	20	0.20	1	Perm	30/01/2020 10:10:15	admin	Changed
102010	Softrroll White 70g	30	0.20	1	Temp	30/01/2020 10:37:42	admin	Changed

End of Report

Print ... Setup ...  Generic Text  Difference  User Changes  Audit Trail Sort by : Code  Ascending Close

Please note: When you run the report, it works on the first instance every time, that said if you then re-select another option e.g. User Changes to Audit Trail, the report may require a different set of data options and as such may fail, simply re run from the start to Fig 9. Then re-select a radio button of choice e.g. Audit Trail.



**New feature on Importing EDI Orders (optional use)**

When you import EDI orders there is now a checkbox that allows you to add to existing perm orders. You can use this at the same time as adding to existing (non-perm) orders.

Fig 13.



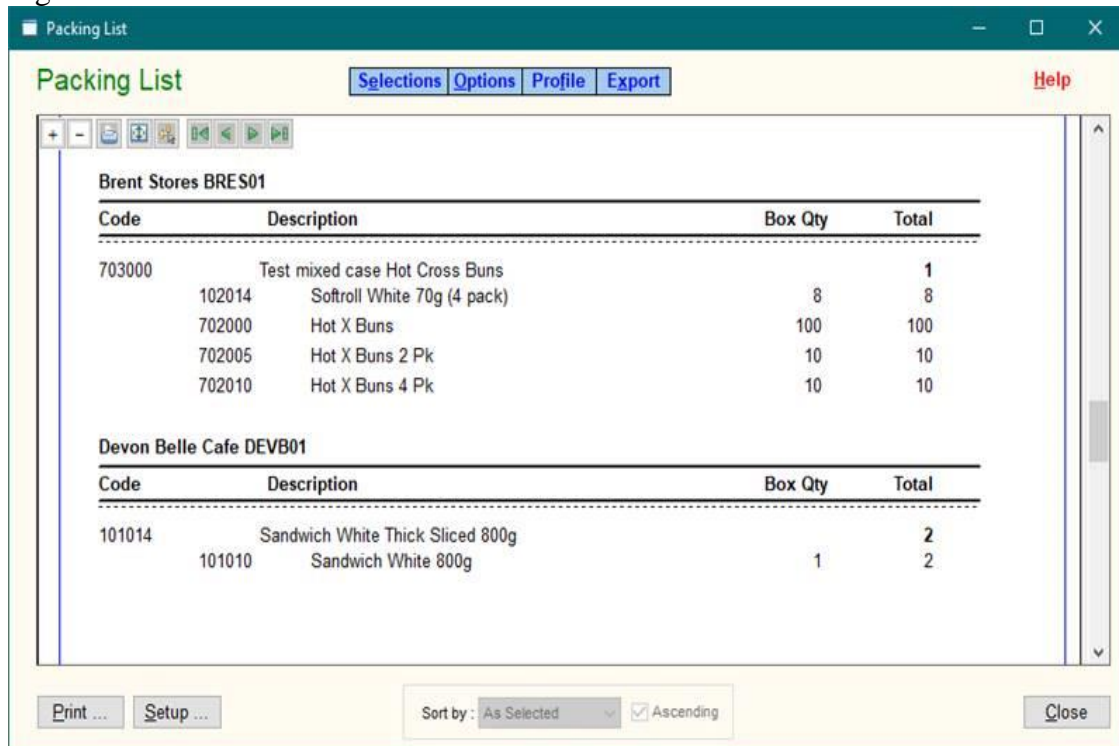
**New feature for Packing List,**

You now have added a new feature to facilitate PACKING, especially useful if you offer multi box items within the one Case.

The report displays the parent BOX example (ID 70300 **Test mixed case Hot Cross Buns**), it then breaks out the various products within said parent Boxed Item.

Ordering / Reports / Packing List / **Format S1200C**  
**To break by Customer**

Fig 14.





Ordering / Reports / Packing List / **Format S1200**

**No Customer breaks**

Fig 15.

**Packing List** [Selections] [Options] [Profile] [Export] Help

**Boxed Item Packing List** For: Saturday 18 Apr 2020 Delivery: ALL Page 1 of 1

Report Time: 9:19 AM Customers selected by: Code  
 Include Permanents: Yes From: ALBC01  
 Include Extras: Yes To: ZCOOP03  
 Charged Orders Only: Yes Products selected by: Code  
 Summary Totals: No From: 101010  
 To: 910000

Code	Description	Box Qty	Total
101014	Sandwich White Thick Sliced 800g		10
101010	Sandwich White 800g	1	10
101016	Sandwich White Med Sliced 800g		4
101010	Sandwich White 800g	1	4
102018	Sofroll White 70g (12 pack)		5
102010	Sofroll White 70g	12	60
102054	Baps Floury White 70g 3 inch (4 pack)		2
102050	Baps Floury White 70g 3 inch	4	8
102066	Baps Sesame White 70g 3 inch (4 pack)		6
102060	Baps Sesame White 70g 3 inch	4	24

Print ... Setup ... Sort by: As Selected Ascending Close

Ordering / Reports / Packing List / **Format S0006**

Fig 16. Lists only the number units within a given Box / Pack

**Product List** [Selections] [Options] [Profile] Help

**Product List** Report Date: Fri 17 Apr 2020 14:06 Page 2 of 4

Products selected by: Code  
 From: 101010  
 To: 910000

Box ID	Description	Stock ID	Description	Quantity
101426	Rye 100% Tin 400g Med Sliced	101424	Rye 100% Tin 400g	1
102014	Sofroll White 70g (4 pack)	102010	Sofroll White 70g	4
102018	Sofroll White 70g (12 pack)	102010	Sofroll White 70g	12
102026	Sofroll Jumbo White 85g (12 pack)	102020	Sofroll Jumbo White 85g	12
102034	Finger Sofroll White 70g (4pack)	102030	Finger Sofroll White 70g	4
102038	Finger Sofroll White 70g (12 pack)			

Print ... Setup ... Export Sort by: As Selected Ascending Close

**Round Packing List format S0007**

Might be very useful for HOME DELIVERIES (if using Temporary Customer)  
 Previously this report did not include the address detail of multiple Cash/Temp Orders.

As you may know accounts typically used for Cash Sales are set as:

1. Delivery Note to act as Invoice: **YES**
2. Invoicing Period: **DAILY**
3. Statement Period: **can be either** Weekly or Monthly
4. Cash or Account: **Can be Either** depending if driver picks up the money, or the office take pre payment
5. Perm or Temp: Needs to be **Temporary**

Fig 17.

The screenshot shows the 'Customer Maintenance' window with the following details for customer CASH01:

- Customer ID: CASH01, Status: NORMAL
- Short Name: (empty), Statement ID: CASH01
- Name: Cash Sales Account 1
- Address: (empty)
- Postcode: TN25 4QG, Store/Branch: (empty)
- Phone: 07817 511964, Fax: (empty)
- Email: bob.young@foodlogik.co.uk
- Company: 0001, Invoice/Delivery Note:
- EDI H/O ID: (empty), Invoice Period: Daily
- Price Table: STANDARD, Statement Period: Monthly
- Accepted Prods: (empty), Cash/Account: Account
- Alt Stock Table: (empty), Perm/Temp: Temporary
- Round: R01, Default Category: (empty)
- Order Tol. Table: (empty), Cash Collector: R01
- Lead Table: (empty), Min Order Value: (empty)

Process the FIRST Cash / Home Delivery (Temporary Order) as normal  
 Thereafter everytime you create a subsequent order Fig 18. pops asking if you want to change the original, or **CLICK NEW** in the footer to create a second order.

Fig 18.

The 'Order Selection' dialog box contains the following table:

Order ID	D/Note No.	Value	Name	Address Line 1	Postcode
49327	00033562	24.78	Bob Young	Test One first Cash Order	HH11 1JK

Buttons at the bottom: OK, New ..., Cancel

## Spring 2020 New Features To Daily Order Screen, FOC

To print of the report go to: Data / Reports / Round Packing List / Format S0008  
 This report by design only shows TEMPORARY Account details

If you use Format S007 it includes all customers on the round. Notice under Cash Sales Account 1 it displays the address details of the two Temporary Orders e.g. Bob Young & Marie Young

Fig 19.

The screenshot shows a software window titled 'Packing List' with a sub-header 'Round Packing List'. It contains a table with columns for Customer, Address, Delivery Instruction, Quantity Packed, Quantity Loaded, and Quantity Delivered. The data is organized into sections: 'Contact Details' for Albion Cafe, and 'Cash Sales Account 1' for Bob Young and Marie Young.

Customer	Address	Delivery Instruction	Quantity Packed	Quantity Loaded	Quantity Delivered
<b>Round R01      Round One</b>					
<b>Contact Details</b>					
Albion Cafe	Europark Cold Storage Dept	Deliver by 12.30pm unless told			
Bob Young	Europark Drive Sittingbourne Kent ME9 8NY	different			
<b>Cash Sales Account 1</b>					
	TN25 4QG				
Bob Young	Test One first Cash Order Ashford				
Tel : 07817 51964	Kent HH11 1JK				
Marie Young	Test Two second cash order	TN25			
Tel :	4QG				