Newsletter — Spring 2012

Now that summer's almost arrived here is a roundup of enhancements to the SOM *Food Management System* during the first quarter of 2012. In the last few weeks there has been great interest in emailing documents – PO's, invoices etc – driven by the recent increase in postal charges, and this has led to a series of new features designed to make it easier to use. There has also been great interest in end-to-end batch traceability because of the requirements of BRC audits and the food wholesale market, and this has led us to further improve product traceability from supplier to customer.

As ever, if you have any questions or would like an update to take advantage of these features, please feel free to contact us on 01795 418900.

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2012: New Features and Formats ....

Improved emailing – Customer Screen Option

One key area of development is the ability to nominate which customers receive documents by email, with new settings on the Customer screen, making it much simpler to set up and administer. Second, emails can now be sent from the central server i.e. not necessarily from the Outlook on your PC. This has great advantages for customers who need to send scores or even hundreds of emails per day, as do JG Ross of Aberdeen. Ross' shop raise POs on their local and national suppliers for Coke, crisps, sandwich fillings etc. The central SOM server runs Purchase Order printing every 10 minutes, automatically sending all new PO's raised by email.

Watch this space! – even more email improvements are in the pipeline. Firstly, the ability to set up multiple email addresses per customer or supplier, and secondly the ability to merge documents into one file. This will cover the situation where a local authority, for example, wants the invoices emailed but would prefer to see one PDF document for 100 invoices rather than 100 PDF documents, one per delivery address. We'll let you know as soon as these new features are available.

These check-boxes appear only if the email address is filled in. Decide which documents will be sent by email and when the invoice is generated, it will automatically be emailed.

2012: New Features and Formats ....

Automatic despatch from stock

The new F11 key on the Daily Ordering screen allows despatched stock to be recorded. If traceability is on, this will be on a FIFO basis (i.e. oldest stock first) although there is an option to allocate specific batches if required

Press F11 or Click Dispatch to show this screen

Remove Dispatched Goods

Selections | Options | Profile | Export

Delivery : 1	Dispatch Date : Tue 29 May 2012		Customer ID : 0004
Charged Only : Yes	Perms : Yes	Extras : No	Boxed Items : No	Shorts : No

Stock ID	Description	Default Location	Current Stock Level	Dispatch Qty	Qty to Remove	Manual Alloc'n
0165	KING HUFF WRAP	DEFAULT	20	6	6	☑
0172	TORPEDOS WRAP	DEFAULT	12	3	3	☑
0175	M/C BAGUETTE WRAP	DEFAULT	10	3	3	☑
0226	KINGS HUFFKINS (2)	DEFAULT	10	9	9	☑

Go | Print ... | Copy Loc'n | Allocate | Sort by : As Selected | ☑ Asc | Close

Shows batch codes available.

Allocate Dispatched Stock

Current Item : 0226 - KINGS HUFFKINS (2)		
Dispatch Qty : 9	Total Allocated : 5	Balance Req'd : 4

Location	Use By	Bin No.	Batch	Remaining Quantity	Allocated Quantity
DEFAULT	01/09/12	3288	239639A	5	5
DEFAULT	01/10/12	3289	387639F	5	0
				Total :	5

Done / Close | Reset | Auto | ◄◄ ◄ ► ►► | Cancel

Customer Traceability

The *Track Product Usage* screen (see Menu: Stock Control, Track Usage, Products) shows all movements in and out for a range of products and dates. This includes the customer the batch was despatched to, as well as the date, so full traceability is now possible.

Supplier Traceability

The *Trace Ingredients by Batch* screen (see Menu: Stock Control, Traceability) now shows the supplier the batch was received from, as well as the date and the PO number.

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2012: New Features and Formats ....

Purchase Order EDI

Most of our customers use EDI for receiving orders and sending invoices. However McGhees of Glasgow have a significant volume of Purchase Orders daily against one supplier, so a significant development was completed to automatically create the purchase orders in SOM and to generate an EDI file in Tradacoms V9 format. This has reduced the time taken to create and transmit EDI POs by at least an hour a day and significantly reduced the likelihood of errors and omissions.

View Purchase Order Delivery Details

In order to keep track of the remaining quantity on a PO, the Stock Delivery screen now show the original and received quantity. In addition, the View Purchase Orders screen has a new drill-down via Delivery Details to show the PO items delivered, including the batch number and whether they have been invoiced.

View Purchase Orders

Supplier ID: 0002

Name: HEYGATES

PO No.	Date	Dly	Status	Dly Status	Inv Status	Raised By	On	Value
357	01/02/12	1	Delivered	Part Received	N/A	merit	01/02/12	5962.75

Received	Time	By	Dly Note No	GRN	Veh Reg	Driver Name
01/02/12	3:31 pm	merit	DN009987	127		BILL

Type	Stock ID	Description	Qty	Batch	Inv
I	PLMO/01	PLUM MOULD (0001)	225000.0000	BG4646	✔
I	FLBA/02	FLOUR BAKERS (0002)	11200.0000	356356	✔

View | Print ... | Export | PO List | Back | Close

Third-party product pricing

For Bought-in products, suppliers can be assigned using the new 3rd Party tab on the Products screen. They can also be seen and maintained on the Product Prices screen (Menu: Stock Control , Supplier Prices, Product Prices) so multiple suppliers per product are allowed.

Ingredient cost - show supplier history

The "Costs" button, on page two of the ingredients screen now shows the supplier at the time of the cost change, in line with the new Supplier Ingredient Prices screen.

Multi-site purchasing and goods inwards

A stock location can be set up per site, for users with more than one factory, warehouse or retail outlets. Each location can be linked to a "customer" on the Stock Location screen (Menu: Data, Stock). If the customer is put on the purchase order header, the customer address will be used as the delivery address and the goods will be received to the appropriate location.

Selection Window

Customer and product selections now include an "F6" which means "copy first entry".

Payment Check

A new check box on the customer, page 3 says "Check for Pre-pay". If checked the order will prompt to state that payment has been taken, and if not, the order is automatically put on hold.

Purchase Invoice Matching

1. If the quantity is changed the VAT value is automatically recalculated

2. If the price is changed the supplier price and ingredient standard cost are automatically updated. This features is controlled in Special System Settings, page 2.

2012: New Features and Formats ....

New Report Formats

Production figures similar types ST004 and ST004A

- These formats are used to group similar type products together, including a summary page.

Purchase invoice interface to Sage 200

Ingredient cost report format S0004

- shows cost change history for last 30 days.

Van reconciliation report—new "Received" column

- This amendment allows the total goods put on the van to be reconciled with the totals received by customer within each van round.

Add Vat to purchase invoice debit note

Contribution reports format S0003 and S0003LG

- Shows sales per period including a line graph

Delivery note, Daily Invoice, Invoice/Delivery note and PO —format S0020

- Allows for a simple letter head layout

New Product Sales Analysis format

New Packing List format S0005.

- Shows no products, but does show customer details plus column heading for baskets returned and delivered.

Daily Cash Sheet format S0002—to show up to five payment types

Prep sheet format S0004

Shows total ingredients required, plus the available stock including batch numbers.

New Product Sales Trends export.

 - This exports sales details for a range of customers and products for a specific day of the week over a 13-week period.

Weekly Invoice this week G2002

- Based on C2001 but puts (**-**) where there is no order for that day

New Report Formats (continued)

Statement G0101 – address positioned for envelope window.

Delivery Notes

    C6109a - Unpriced delivery note. Shows (e) exceptional orders.

    G0010 – Delivery Note with no VAT, no discount and pound sign.

    G0011 – Delivery Note shows 45 items per page.

Purchase Order

    S0001 – Large Free Format Descriptions.

    S0002 – Purchase Order. As S0001 - unit title and copies 1/2/3

Order Status Report S0005 – Customers without adjustments orders.

Ingredients Costs Report

    S0003 – Purchase Price Usage Comparison—current vs start of year.

    S0004 – Ingredients Cost History – Shows price change for last 30 days.

Production Figures

    Default Format - New hash total

    ST0002b – now with trays.

    G0045 – with totals.

Till Sales Reports

    Default — Till sales details

    S0001 - Till Sales Summary

2012: New Features and Formats

MerIT
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Counter Sales

This is a major new development aimed at, as you might guess, trade sales over the counter. The key features are: display and update of price and margins, ability to view sock and purchase history, automatic posting of cash for cash customers and automatic removal of stock. See this link for further details http://www.mtel.co.uk/downloads/?media=50

- *Scan bar-code*
- *Auto-suggest linked products*
- *Check on stock levels*
- *Uplift sales revenues*
- *Generate invoice and allocate cash with a single click*

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And Finally ...

There is always plenty of activity among our customers, old and new, as people upgrade or invest in new software, such as:

St Andrews Bakers—New Merit Customer

Based in Kirkcaldy, Fife, St Andrews was created out of Kingdom Bakers which ceased trading in January 2012. The management team quickly decided to replace the old system with *Smart Office Manager* and got the ordering, despatch and invoicing modules up and running almost immediately. Since then they have added EDI, recipes, ingredients, purchasing and stock control — all in a few short weeks. "In terms of computer software, the contrast in efficiency and scope between what we had before and what we have now is pretty remarkable."

Watson's Bakery — Upgrade from COBS

Watson's are a Merit customer of long-standing and have recently upgraded to SOM. Director Ann Watson says the system has provide immediate benefits and improvements over COBS. "We were particularly interested in emailing invoices and that has already saved as a great deal of time and cost. We are shortly going live on EDI via Enterprise Foods as well, which we fully anticipate will save us at least an hour a day processing orders and invoices."