

# Newsletter – Autumn 2012



## Three new Merit customers in September

Our Autumn update highlights many enhancements to the SOM *Food Management System* during an extremely busy second quarter of 2012 and also includes news of several new customers and upgrades. The continued interest in emailing documents has led to even more development in this area, designed to increase flexibility and ease of use, and there has also been great interest in integration, with customers and suppliers, including EDI POs and EDI order transfers between group companies.

**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.**

### In this Issue .....

- **Products**  
*Images — Picture your products*  
*Download to your website*
- **eMailing**  
*Multiple email addresses*  
*Combined PDF files*
- **Purchasing**  
*Authorisation*  
*Outstanding Orders*



### New Customers and Upgrades

*Johnson & Wood Bakery, Voe, Shetlands : installed and live in just three weeks!*

*Kompleat Solutions : Startup company invests in integrated system from day one.*

*James Buckland (Food Wholesaler): Company growth and modernisation leads to major system investment.*

*Evershot Bakery of Dorset migrate from COBS to SOM in a very smooth cutover - "...more than halved the time spent punching in the stocktaking data. Wow.."*

*Ryders Homemade Bakery migrate from COBS to SOM and sees immediate benefits.*

*Kelly of Cults upgrades to SOM after 20 years with COBS:*

*Harrisons Bakery of Wilmslow, Cheshire, upgrades after 11 years with COBS to SOM, expects to go live over the next few days.*

*Il Mulino Bakery commits to SOM upgrade after 20 years with COBS.*

### Product Image

Many of our customers display product images on their websites, and this raises the issue of keeping the SOM products list in line with the website database. A neat way of addressing this problem is to store the images on the SOM server linked to the product ID, and a new "Image" tab has been added to the products screen so they can be viewed on-line.



## 2012: New Features and Formats ....



### Improved emailing – New Customer Page

Several additional fields required to control emailing and PDF file generation has led to a new page in the customer screen to hold email options.

Customer Maintenance

### Customers

Find [Navigation Icons] By: Code (A)

Page 1 2 3 4 Browse

Customer: 0001 AYLESHAM FAMILY BUTCHER

Email Settings

Email Address: piet.mtel@gmail.com

H/O Email:

Email Delivery Notes :  Email Statements :  Email Invoices :

Send Email to H/O :

Misc

Start Date: 00/00/00 Master Type: Normal

Order Lookup Days: 7 Department: 399

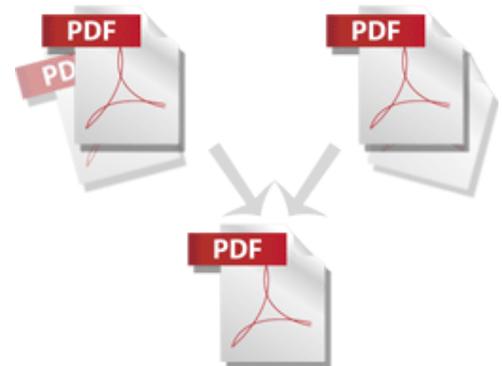
Advanced Production: Default P.O. No. :

Notes

Save New ... Save As ... Status ... Export Formats ... Categories Close

### PDF Merge

If the customer is part of a group, i.e. with a central statement account, any PDF delivery notes, invoices, statements or credit notes can be merged into one document. 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.



## 2012: New Features and Formats ....



### Multiple email Addresses

The customer contact email address, plus new email options make it possible to set up multiple email addresses per customer e.g. one for accounts, one for purchasing etc.

Customer Contacts

Cust ID: 0001

Name: AYLESHAM FAMILY BUTCHER

Name: Accounts Amend

Position:

Phone: Extension:

Fax: Email D/Note:  Inv:  Stmt:

E-mail: accounts@mycustomer.co.uk

Notes:

Save New Delete Print ... Close

### New Stock Summary Window

The Products screen has a new Stock Details button, which displays stock at all locations

Product Maintenance

Finished Products

Find Export

Page 1 2 Prices 3rd Party Images Browse By: Code (A)

Stock Id: 0001 Status: NORMAL

Item: 0001 - COTTAGE

Loc ID	Description	Packs	Items
AREA1	Storage Area 1	5	5
DEFAULT	Default Storage Area	15	15
Totals:		20	20

Close

Discount Band: B001 ? Racks per Oven: 1

Analysis Code: ? Display Price:

Default Category: BRD ? Print Sort Code: 10

External ID: EXT0001 Special Offer: Seasonal Product

Save New ... Save As ... Status ... Print Stock Details Close

## 2012: New Features and Formats ....



### Till Sales Reconciliation

For customers with retail outlets, this report— driven by **Harry Gow - first ever "Scottish Baker of the Year"** - helps to efficiently reconcile the quantities delivered to the shop with the quantities sold.



### Till Sales Reconciliation Report

From : Mon 08 Oct 12 To : Sun 14 Oct 12

Page 1 of 1

Products From : Code 101010 to 800810  
 Customers From : Code AMYB10 to AMYB15

View by Selling Qty : Yes Delivery : ALL

#### Location : AMYB10 - Amy's Bakery (Dover)

Code	Description	Bakery Order	Order Value	Price	Till Sales Qty	Value	Qty Diff	Value Diff	%age Diff
101016	Sandwich White Med Sliced 800g	36	60.84	1.690	26	43.94	-10	-16.90	-27.78
101020	Farmhouse White 800g	29	49.01	1.690	22	37.18	-7	-11.83	-24.14
102010	Softroll White 70g	838	226.26	0.270	679	183.33	-159	-42.93	-18.97
102018	Softroll White 70g (12 pack)	21	44.10	2.100	14	29.40	-7	-14.70	-33.33
102054	Baps Flourey White 70g 3" (4 pack)	66	79.20	1.200	55	66.00	-11	-13.20	-16.67
102066	Baps Sesame White 70g 3" (4 pack)	25	32.75	1.310	19	24.89	-6	-7.86	-24.00
102322	Baguette Crusty 300g	209	152.57	0.730	142	103.66	-67	-48.91	-32.06
<b>Location Totals :</b>			<b>£644.73</b>			<b>£488.40</b>		<b>£-156.33</b>	<b>-24.25</b>

#### Location : AMYB15 - Amy's Bakery (Canterbury)

Code	Description	Bakery Order	Order Value	Price	Till Sales Qty	Value	Qty Diff	Value Diff	%age Diff
101014	Sandwich White Thick Sliced 800g	38	64.22	1.690	29	49.01	-9	-15.21	-23.68
101020	Farmhouse White 800g	28	47.32	1.690	26	43.94	-2	-3.38	-7.14
101040	Bloomer White 800g	38	64.22	1.690	28	47.32	-10	-16.90	-26.32

## 2012: New Features and Formats ....



Several changes related to adding the suppliers reference to various reports and screens, including **Quick Product Stock Adjust**.

Quick Product Stock Adjust										
Location : DEFAULT			Date : Sun 26 Aug 2012			Method : Bin		Sort by : Code		
Comments :						<input checked="" type="checkbox"/> Ascending				
Stock ID	Description	Quantity (Packs)	Quantity (Items)	Sell Qty	Status	Use By	Bin	Batch Code	Supplier	Supplier Ref
COKE	Coke 500ml	24	24		1 Normal	00/00/00	643	00000006	0001	Coke 500ml
		24	24		1 Normal	00/00/00	644	00000007	0001	Coke 500ml
		48	48		1 Normal	00/00/00	645	00000008	0001	Coke 500ml
		24	24		1 Normal	00/00/00	646	00000009	0001	Coke 500ml
		24	24		1 Normal	00/00/00	651	00000012	0001	Coke 500ml
		96	96		1 Normal	00/00/00	670	00000021	0001	Coke 500ml
		72	72		1 Normal	00/00/00	673	00000022	0001	Coke 500ml
		240	240		1 Normal	00/00/00	698	00000036	0001	Coke 500ml

### Purchasing has also had several enhancements:

Delivery note mandatory on Stock Deliveries screen—this is to make it more difficult to receive stock without recording the supplier’s delivery note.

**PO Authorisation Screen**— designed to display Purchase Orders requiring authorisation, so they can be reviewed, amended or authorised from the same screen. This means that only nominated users are allowed to raise supplier orders over a certain value, so protecting your business from unexpected costs.

PO Authorisation							
PO No.	Supp ID	Name	Date	Dly	Raised By	On	Value
265	0001	Merit Bakers & Confectioners Ltd	14/04/11	3	admin	06/05/11	140.61
268	0002	Heygates Flour Millers	06/05/11	1	john	06/05/11	457.34
276	0001	Merit Bakers & Confectioners Ltd	01/07/11	1	admin	01/07/11	117.52
280	0001	Merit Bakers & Confectioners Ltd	20/08/11	1	piet	17/08/11	1506.90
338	0004	BFP Limited	19/03/12	2	merit	19/03/12	20.00
340	0001	Merit Bakers & Confectioners Ltd	27/03/12	1	piet	27/03/12	47.50
350	0003	G R Wright Flour Millers	04/04/12	1	piet	04/04/12	30.00
351	0002	Heygates Flour Millers	04/04/12	1	piet	04/04/12	22.00
352	0001	Merit Bakers & Confectioners Ltd	04/04/12	1	piet	04/04/12	113.90
353	0001	Merit Bakers & Confectioners Ltd	05/04/12	1	piet	05/04/12	47.50

View Authorise Open PO Print ... Export

## 2012: New Features and Formats



**New Outstanding PO Deliveries report**—this is designed to help chase up late or outstanding deliveries, to check how much you are committed to buy and also to give the storeman a forecast of today's deliveries.

Outstanding PO Deliveries							
		From : Mon 02/01/12		To : Sat 25/08/12		Page 2 of 2	
Suppliers selected by Code from 0001 to 0010							
Products selected by Code from 0001 to ZZ2701002							
Ingredients selected by Code from 0010/05 to YEAST							
<b>Supplier : 0001 Merit Bakers &amp; Confectioners Ltd</b>							
Due Date	PO	Stock ID	Description	Quantity Ordered	Quantity Delivered	Price	Outstanding Value
25/04/2012	374	BEBU/01	BEEF BURGERS (0001)	10.00	0.00	7.14	71.40
19/06/2012	399	COKE	Coke 500ml	10.00	0.00	1.23	12.34
25/06/2012	400	BABA/01	BACON (BACK) (0001)	10.00	4.00	2.75	16.50
06/07/2012	404	0922	SWISS ROLL(LEMON)	10.00	15.00	0.99	-4.95
06/07/2012	404	BABA/01	BACON (BACK) (0001)	10.00	6.00	2.75	11.01
<b>Total</b>							<b>1,363.92</b>
<b>Supplier : 0002 Heygates Flour Millers</b>							
Due Date	PO	Stock ID	Description	Quantity Ordered	Quantity Delivered	Price	Outstanding Value
13/08/2012	406	FLPA/02	FLOUR PATENTS (0002)	60.00	34.00	16.20	421.20
13/08/2012	406	FLRU/02	FLOUR RUSTIC FLAKES (0002)	67.00	28.00	9.83	383.37
<b>Total</b>							<b>804.57</b>

### New View Purchase Order Details

The delivery details of all purchase order deliveries can now be viewed, including quantities, batch numbers and delivery-invoiced flags.

View Purchase Orders

### View Purchase Orders

Supplier ID:  ▼

Name: Heygates Flour Millers

PO No.	Date	Dly	Status	Dly Status	Inv Status	Raised By	On	Value
268	06/05/11	1	Delivered	Part Received	N/A	john	06/05/11	457.34

Received	Time	By	Dly Note No	GRN	Veh Reg	Driver Name
06/05/11	4:50 pm	piet		212		

Type	Stock ID	Description	Qty	Batch	Inv
I	FLCO/02	FLOUR NORFOLK CRUNCH (0002)	64.0000	00000018	<input type="checkbox"/>
I	FLPA/02	FLOUR PATENTS (0002)	64.0000	00000019	<input type="checkbox"/>

New FORMATS added to the PDF file on 3<sup>rd</sup> October 2012:



The complete list can be found on our website [www.mtel.co.uk/downloads/general/Smart Office Manager Report Formats](http://www.mtel.co.uk/downloads/general/Smart%20Office%20Manager%20Report%20Formats), but here are new ones added in the last few months.

G0001 - Account Balances.  
G0001b - Production Array by Customer. (Double spaced)  
S0001 - Audit trail. Customers not Invoiced.  
S0003 - Customer Contributions. Totals by Period.  
S0003lg - Customer Contributions. Line Graphs  
S0021 - Credit Note. Logo, Address fits Envelope.  
Default - Debit Note. VAT added to format.  
G0020 - Delivery Note, uses print sort code.  
G3005 - Delivery Note.  
G3006 - Delivery Note.  
G4002a - Delivery Note. As c4002 but with 'returns' over column 5.  
S0020 - Delivery Note. Headed paper  
S0021 - Delivery Note. Company logo, address fits into envelope window.  
S0021A - As S0021 without prices.  
S3002 - Delivery Note. Logo and baskets.  
S6280a - Delivery Note. Alternate items and descriptions.  
S0020 - Inv/Del note. Pre-printed stationary.  
S0021 - Inv/Del note. Company logo, address fits into envelope window.  
S0020 - Daily Invoice. Pre-printed stationary.  
S0021 - Daily Invoice. Company logo, address fits into envelope window.  
Default - Outstanding PO Dels.  
Edi001 - Prod Figs. Qty is ordered divided by number per tray.  
G0006 - Packing List. Delivery Schedule.  
G0104 - Packing List. As G0102, No extra/short  
S0005 - Delivery Schedule.  
S0006 - Delivery Schedule. Just Customers, no products.  
S0020 - Purchase Order. Preprinted stationary.  
S0021 - Purchase Order. Company logo, address fits into envelope window.  
S1000 - Purchase Order. Shows Outstanding Qty (i.e. not delivered yet)  
S3000 - Purchase Order. Company logo.  
S0015 - Product Sales Analysis. Summary by Cust and Prod categories.  
S0001 - Product Stock Take. Shows Supplier Refs.  
G2002 - Weekly Invoice.  
S0020 - Weekly Invoice. Preprinted stationary.  
S0021 - Weekly Invoice. Company logo, address fits into envelope window.

This latest addition brings the total to almost 500 freely available formats pre-loaded in to your SOM application.

*If you cannot access these new formats, we'll just need to send an update, so feel free to contact Merit on 01795 418900*

## Merit Welcomes...



Merit are delighted to welcome three new customers to our growing list of users

### **Johnson and Wood, Voe , Shetland**

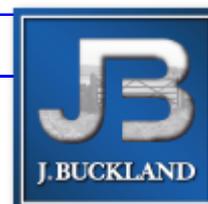
Situated in the picturesque village of Voe, Johnson and Wood specialise in traditional Shetland bannocks together with a full range of craft bakery products. Director Tracey Thompson says *"We were convinced to make this investment after visiting Argos Bakery in Orkney where we saw how well they were getting on with SOM and how it interfaces with Sage. This spurred us to make an immediate decision and we went live only two or three weeks after placing the order with Merit! It's already saving us a great deal of time processing orders and paperwork, which is proof that we've made the right decision"*.

### **Kompleat Solutions, Hull**

Kompleat Solutions supply products and services to major retailers such as Costco, and the company needs a fast and flexible solution to manage customer and supplier orders professionally and efficiently. Rather than invest in a new server and infrastructure, Kompleat went for a virtual server (paid for on a monthly basis) that can be accessed from any of their offices in Hull, Surrey and Kent. MD Mike Rothlaan says: *"We invested in Merit because we want a powerful system from the start that can grow with us as we grow. The training, installation and configuration has been spot-on so we are very comfortable that Merit will help us achieve what we need."*

### **James Buckland Ltd (Food Wholesaler)**

J Buckland are a thriving and fast-growing foodservice supplier based in Basildon. Having recently expanded their storage and delivery capacity, phase two will be to install a fully integrated multi-user system to deal with order processing and picking. MD Danny Silverosa says *"I'm very keen to complete the implementation to achieve fast benefits and returns from this investment. From what I've seen of the company, their ability to make quick changes and also from visiting existing users, I know this system has the features we need"*.



### **Evershott – Upgrade from COBS**

## **EVERSHOT VILLAGE BAKERY**

Evershot Bakery of Dorchester are a very long-standing COBS user (17 yrs) who have moved to SOM recently. Director Steve Crate says "We spent a long time getting prepared, but the actual cutover was surprisingly quick. All of our data was migrated very smoothly and that made it far easier to pick up. Merit were constantly on hand to deal with queries, and could always dial in to show us exactly how the screens work. Overall, our new system uses up much less of our time than COBS did, and has much more potential. *The most impressive part of the package for me is that I've more than halved the time I spend punching in the stocktaking data. Wow...*

### **Ryders Homemade Bakery – Upgrade from COBS**

Ryders Homemade Bakery of Dawlish are yet another very long-standing COBS user (20 yrs) who have upgraded to SOM in the last few months. Director Shaun Ryder says "The business has been undergoing a huge transformation recently, and I decided the only way to cope in the long term was to upgrade to SOM. Once I went for it, the actual cutover only took a week or two, because Merit moved all of the data across and helped us set up Categories and so on, so that the reports came out exactly right. The new system is much more easy to operate so I can leave more to my staff, which saves me a lot of time. I wish I'd done it a lot sooner!"

### **Here are some other customers who have recently committed to upgrading to SOM/FMS**

**Il Mulino**

**Kelly of Cults**

**Harrisons Bakery**

**JL Bakery**



We plan to publish their experience and the benefits they will have gained in our next newsletter.