

New Year, New Decade and Exciting New Developments at Merit

After ten years service Martin Shirley has stepped down from the management team and taken his justly deserved retirement. We wish him a long and happy retirement and in his place Merit are pleased to announce the appointment of Bill Ward as General Manager. Bill has worked in the manufacturing software sector for many years and brings wide, in-depth experience in software development, consultancy, customer service, project management and operations, as well as having spent the last 12 month's training, supporting and implementing Smart Office Manager, so he is highly qualified to play this important role in the plans for Merit's future.

Bill will work closely with the Merit team to strengthen our business growth and continually develop the product range. The particular areas of focus just now are the *Web Sales* module for shop integration, as well as further development of the *Production/Stock Control* module, the latter because many more customers are now dealing with frozen goods (not just because of the cold weather!) and need to make-to/sell from stock. To respond to this requirement, Works Order Processing and Master Scheduling modules are being developed for release by quarter 2 of 2011. These will enable:

- ***Make to Stock and Available to Promise***
- ***Balance supply with demand***
- ***On-line production recording***
- ***Actual vs Planned Production Cost Reporting***

Web Sales and Till Sales

The Web Sales module, currently being used to great effect by Culloden Foods in 16 shops is now also being piloted in several shops by JG Ross (Bakers) Ltd, of Aberdeen. The scope of the pilot is for two of their shops to raise daily orders via the intranet, to record retained stock and maintain their standing orders, and also to link with their EPOS till software. Quite apart from the productivity benefits, this will enable comprehensive management reporting of potential lost sales, wastage and sales discrepancies, as well as providing a full sales analysis and stock position. JG Ross' Financial Controller, Robert Gordon says *"we've been working with Merit for many years now – with SOM and before that COBS – and from what we've seen of Web Sales the benefits are going to be significant. We already have two shops using the software and can't wait to get the rest up and running. We also want to get the shops raising their own purchase orders using Merit's web software and hope to get that development complete in the next few weeks"*.

- **Any shop-based PC, hand-held or web-enabled till**
- **Access to the internet via Web server**



Works Order Processing



- *Integration with production planning*
- *Calculates ingredient requirements*
- *Highlights actual vs planned quantities*

Works Order Processing is a brand new module, fully integrated with the existing Recipes and Stock Control/Traceability modules, aimed at providing full control and visibility of production planning and costing. This requirement has been driven by several customers who need to record actual production and ingredient usage on the shop floor so enabling tighter control of costs and traceability. As production is recorded, work in progress and finished goods stock is automatically updated on-line, and as ingredients are issued stock is reduced correspondingly. This means that stock valuations and usage analysis can be easily obtained and will also enable comprehensive production variance reporting i.e. actual vs planned costs.

- Automatically create base mix and ingredient requirements
- Record production on-line

W.O. No.: W0000001 Resource:

Make Item: 0154 - 1/2 BAGUETTE

Planned Qty: 35.0000 Qty Made: 12.0000 units

Start Date: 04/03/11 Start Time: 12:00

Due Date: 05/03/11 Due Time: 12:00 Status: OPEN

Ingredient: FLBA/02 Base Mix: Select ...

Ingredient	Description	Default Location	Back Flush	Quantity Required	Quantity Issued
ALES/05	ALMOND ESSENCE (0005)	DEFAULT	<input checked="" type="checkbox"/>	8.2075	2.0000 kg
50GF/05	50TH GOLD FIGURE (0005)	DEFAULT	<input checked="" type="checkbox"/>	140.0000	48.0000 each
ALPA/01	ALMOND PASTE (0001)	DEFAULT	<input checked="" type="checkbox"/>	17.5000	0.0000 kg
BADR/01	DARK RYE (0001)	DEFAULT	<input checked="" type="checkbox"/>	35.0000	0.0000 kg
LACT/05	LACTOFIL SUPREME (0005)	DEFAULT	<input checked="" type="checkbox"/>	8.7500	0.0000 kg
001001	caster sugar	DEFAULT	<input checked="" type="checkbox"/>	35.0000	12.0000 kg

Purchase Invoice Matching

Always listening to our customers, we developed and released the [Purchase Invoice Matching](#) module in summer 2010. It was put to immediate use by a key user, and since then we have added an interface to the Sage and AccPac purchase ledger systems, the facility to raise a debit note, default Nominal Ledger codes per ingredient and several other enhancements to make it easier to use and therefore even more productive.

Purchase Invoice Matching

Supplier: 0001 E. T. WILMSHURST & SONS Reg No: 3

Invoice Ng: X098054 Date: 01/09/10 Internal Ref: WWW00478 Exported:

Total Value: 664.90 Matched Value: 664.90 Outstanding: 0.00

Total VAT Value: 0.00 Matched VAT Value: 0.00

Comment: NO COMMENTS

Select Purchase Order Number: Add

Description	QTY	UOM	Price	Variance	PO No	Del Note	GRN	Date	Matched
						Value	Vat Value	Cost Centre	Acc Code
000002(P) Whole milk - 500 ml					238	DN000874	40	01/09/10	<input checked="" type="checkbox"/>
30 Litres			2.33	0.00		69.90	0.00	100	JRM
APPU/01(I) APPLE PUREE (0001)					238	DN000874	40	01/09/10	<input checked="" type="checkbox"/>
50 kg			11.70	0.00		585.00	0.00	100	MILK
Delivery Charge					0			01/09/10	<input checked="" type="checkbox"/>
1 EA			10.00			10.00	1.75	VAT	CARR

New... Close

- Invoice Register within SOM
- Automatic on-line matching
- Purchase accrual
- Invoice valuation Reports
- Purchase Ledger interface

Customer Remarks



Again as a result of customer feedback (this time JG Ross of Aberdeen), we have enhanced the existing *Customer Remarks* feature to make it a "mini-Customer Relationship Management" system. CRM systems are heavyweight packages and often only 20% of the features are actually used i.e.

- ◆ recording a customer's comments or "remarks"
- ◆ who it was that made the remark
- ◆ the type of remark e.g. complaint or information
- ◆ whether there is an outstanding action
- ◆ who has the action
- ◆ when it must be dealt with

... so that is precisely what **SOM Customer Remarks** now does.



Date/Time	User	Remarks	Follow Up?		
Wed 2 Mar 2011 2:15 pm	admin	dont forge...	Yes	03/03/11	Paul
Fri 14 Jan 2011 3:02 pm	admin	needs extra on fridays	Yes	21/01/11	Bob
Mon 10 Jan 2011 12:45 pm	admin	chase for payment	Yes	12/01/11	Bob
Fri 3 Dec 2010 7:59 pm	admin	Needs to be reminded about birthday cake	Yes	03/12/10	Paul
Thu 25 Nov 2010 8:59 pm	admin	Check was written out wrongly - have to post again	No		Percy
Wed 20 Dec 2006 12:41 pm	admin	Spoke to Harry - cheque in post	Yes	04/01/11	Paul

Optionally, if there is an outstanding remark on a customer the screen pops up when the daily ordering screen opens giving the telesales operator a instant reminder. There is also a full report/enquiry that shows what actions are outstanding, as well as remarks history. At Merit we don't think these features should be separate to the sales module because they are a necessary part of customer service, so we have decided to supply **Customer Remarks** as a standard feature.

Stevens Weighscales Interface

The weighscales interface allows recipes, ingredient stocks and the daily production sheets to be loaded into the weighscales, and enables weighings to be uploaded into SOM. This interface is designed to streamline the data flow between these complementary systems, improving efficiency and reliability and providing confidence in your traceability records and your production costs.

- Export of recipes from SOM to Vantage
- Export of ingredient stock details – ID, lot/batch number, expiry date, quantity and location
- Export of production plans – works order, Mix ID, quantity required and due date
- Import of weighings – Stock ID, lot/batch number, quantity and location



2010: New Features and Formats



Over the last year we have added myriad new features and formats as many new users have come on board or upgraded from COBS. Here are some of them:

- New system option - Default the order quantity in daily ordering to zero
- Sales Debtors report - new format which outputs a mailmerge file so that creditors chase letters can be formatted automatically in MS Word.
- Packing List Report - new format to show one page per product
- Packing List Report - new format to show (e) for exceptional items
- Label output file for Bartender and Planglow label printing software
- Preparation sheet - new format to show finished goods and quantity required
- Order Status report - new format to show orders charged but not invoiced
- Warnings and checks to prevent current prices being changed or zeroed accidentally.
- Optional "copy" watermark on re-printed invoices
- Driver cash recording - allows the driver to enter the cash for his round only. The system then automatically posts the payment to the accounts and allocates to the oldest invoice(s)
- Automatic release of redundant locks on customer accounts each time you log in to SOM, so to clear a locked customer account, just log out and log in again.
- Zero quantity standing orders, which display on the packing list and are visible on the Daily/Weekly Ordering screens.
- The Find Orders program allows you to enter any part of the PO number or GRN, or all of the delivery note or transaction ID, and displays the orders that match those criteria.
- To save time and effort for those users with many price tables per product, SOM now has a new Price menu option for updating all price tables for a range of products called "Update Table Prices By Range". This is in response to calls from several users who are having to deal with more and more frequent fluctuations in ingredient costs, especially flour.
- A new Price Scan report (format: default) allows you to see all prices, or just the special prices, for a specified product

EDI

- EDI has been enhanced in several ways:
- EDI transmission history is recorded against each invoice, with a history screen for on-line interrogation
- Invoice extras can now be transmitted by EDI in addition to "normal" a daily invoice, which deals with extras order taken by the van driver, for example, which need to be transmitted electronically.
- For EDI Orders, there is a new system option so that orders received with a date in the past will be rejected.

New Customers in 2010



Merit are proud to welcome four recent new customers:

D & D Dairies - Farm shop and daily rounds in Perthshire with a dozen vans 700 door-step customers 500 wholesalers.

Lomond Fine Foods - A new manufacturing facility in Glasgow for chilled, ambient and frozen products, supplying a rapidly growing national customer-base.

Reids of Caithness - Specialist craft bakery in Thurso supplying oatmeal and shortbread locally, nationally and world-wide.

Argos Bakery - A new craft bakery and shops in Stromness serving the local and tourist trades.

New Upgrades to SOM from COBS

Additionally we've been kept very busy by the drive to modernise, with these existing COBS users recently upgrading to SOM:

- ◆ Wallace Family Bakers
- ◆ Bakehouse
- ◆ Barkers Bakery
- ◆ Cooplands of Scarborough
- ◆ Macleans of Benbecula
- ◆ The Kandybar
- ◆ Stag Bakery
- ◆ JW Rose (Bakers)

What's new in 2011?



Firstly a new management team, headed up by Bill Ward as General Manager and Bob Young as Service Director. Bill's remit is continue to develop the software to cover the full range of production and to take the software to new areas in the food and drink sector. This includes Meat Pies, Dairies, Drinks, Fruit and Veg – in fact anyone who has a foods-based product.

Secondly a new look brochure and logo. This will mean changes to our web site as well.

Thirdly a new product name – **Food Management System** – to supersede Smart Office Manager (SOM). **Food Management System** is a better description of the full range of software that Merit provide – sales, production, stock control, vans, tills, web sales, purchasing, and EDI. So don't be surprised if the screen menu title changes at your next update and please be assured this will have no impact on your commercial terms with Merit Technology.

Finally, several new developments are in store:

Web Purchasing

Where there are many shops in a bakery or retail group it makes sense for the shop managers to order goods such as salad goods, fizzy drinks, crisps etc. direct from the supplier, rather than send a form through for central processing. Web Purchasing will do this by only allowing the shops to purchase a restricted list of goods, with a default shop delivery address. It will also enable goods receipts to be recorded locally so that the supplier invoice can be matched centrally. Web Purchasing will complement the Web Sales module in further reducing the central admin burden and so improve efficiency and profitability.

Master Production Scheduling

The objective of Master Production Scheduling is to allow food manufacturers to plan ahead to make buffer stock and to sell from that stock. This needs a planning screen called a Master Production Schedule at finished goods and base-mix level. The planning would be done on a rolling basis and would be committed, via works orders, one day ahead. This is a departure from the current daily production figures, which is really aimed at "make to order" manufacture and will benefit larger producers, or those that make to stock, whether chilled, ambient or frozen.

We hope you found this newsletter interesting and informative. If you have any comments or feedback please feel free to contact us at any time.

Tel: (+44) 01795 418900
Fax: (+44) 01795 418929
Email: sales@mtel.co.uk
Web: www.mtel.co.uk
24 hr helpdesk: 007000262222



Powerful cost-effective system solutions for the food industry