MERCHANTER DEMO SYSTEM

ACCESS TO THE MERCHANTER DEMO SYSTEM IS FOR COMPANIES PERMITTED BY TEN-25 SOFTWARE.

IT IS NOT PERMITTED TO GIVE SYSTEM ACCESS, SCREEN SHOTS/VIDEOS, OUTPUTTED DOCUMENTS OR DATA TO OTHER PEOPLE/ORGANISATIONS.

The details below give guidance for using the MERCHANTER demo system. We hope you enjoy using this version of the system is for evaluating the features and usability of the MERCHANTER system.

IMPORTANT NOTES: DEMO SYSTEM USE

- There is a common database of customers/suppliers/products/etc. that are shared with other demo users, so may be updated by them.
- Your actions in the demo system will be seen by other demo users, so only enter information, comments, etc. you are happy to be published outside your business.
- This data is demonstration data, so feel free to buy and sell items as you see fit.
- Invoicing – if you do an invoicing run all will go to a dummy email account unless you enter an email address
- The MERCHANTER demo system has been optimised to run on a desktop/laptop PC (or Mac). It will run on a tablet/phone, but the screens have not been optimised for this yet

IMPORTANT NOTES: EMAILING & PRINTING DOCUMENTS

- Email of documents is live out of the system.
- Please be careful in the use of email addresses when generating sample documents as they will send
- Feel free to email sample documents to yourself/colleagues
- Printing is turned off on MERCHANTER Demo

SYSTEM LOGIN

To access the MERCHANTER demo system please open a browser on device (PC, tablet, phone) and navigate to https://cloud.ut400.net

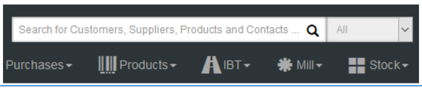
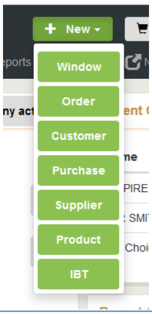
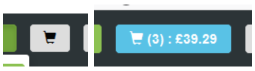
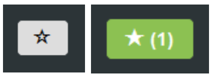
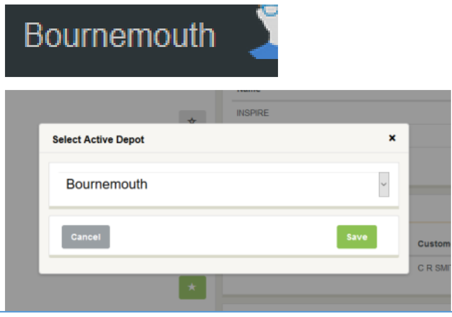
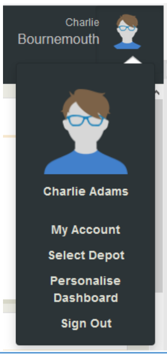
You have been issued with a personal demo user that you can use with the system, including setting your own personalised dashboard. When you have your own MERCHANTER system each user can be given their own specific capabilities within their User Role.

MERCHANTER – UT400

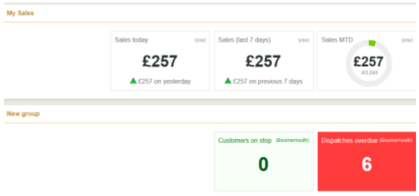
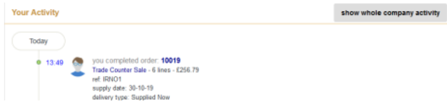
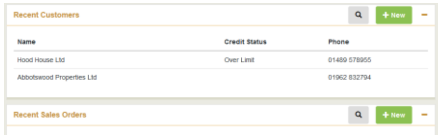
Up until January 2021, the Merchanter system was called UT400. The UT400 name now refers to the generation of trading system, so you may still find references to UT400 within the system and associated documentation.

HOMEPAGE

TOP BANNER

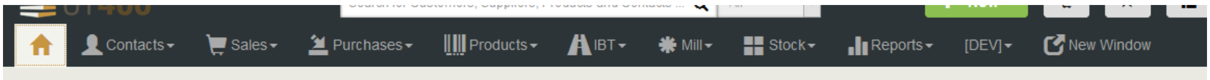
Global Search	Type in anything to search, or filter to only search customers/products/orders/etc.	
New Button	▪ Drop down to enter new items ▪ Window – launches mirror session in a new tab in the browser	
Basket	▪ Click to go to the Basket ▪ Grey if empty, blue if items in the basket	
Favourites	▪ Tag any Activity Timeline entries you wish to set to favourites ▪ Grey is empty, Green with number of favourites	
Tasks	▪ Set tasks for yourself and other users ▪ Set reminders for tasks	
Branch	▪ Active Depot shown next to user name ▪ Active Depot will set where user is trading from, and show default stock/customers/etc. ▪ Click on Branch to select alternative branch ▪ Please operate from Bournemouth branch	
User details	▪ Show current user and thumbnail on top banner ▪ Click thumbnail to set user details or sign out of MERCHANTER	

DASHBOARD

<table>
<tr><th></th><th></th><th></th></tr>
<tr><td>KPI Tiles</td><td>Personalised to each user
Click to drill into detail
Grouped by Topic
View Appendix for list of KPIs currently available
To amend your own, click your user icon (top right) and select ‘personalise dashboard’</td><td>
</td></tr>
<tr><td>Activity Timeline</td><td>Filtered to your user
Click ‘show Whole Company activity’ to switch to all users
Blue links connect to customers, suppliers, orders, products, etc.
Scroll down to autofill older entries</td><td>
</td></tr>
<tr><td>Recents</td><td>List of recently visited customers, suppliers, etc.
Magnifying glass to search all customers, suppliers, etc.
New button to add new customer, supplier, etc.</td><td>
</td></tr>
</table>

JOB MENU

Different User Roles will only be able to see certain menu items



<table>
<tr><th></th><th></th><th></th></tr>
<tr><td>Home</td><td>Return to Dashboard</td><td></td></tr>
<tr><td>Contacts</td><td>Customer Views
Supplier Views
Contact Views</td><td></td></tr>
<tr><td>Sales</td><td>Sales Order Views
Invoices & Credits
Customer Views
Sales Targets
Cash Drawer Management</td><td></td></tr>
<tr><td>Purchases</td><td>Purchase Order Views
Supplier Views</td><td></td></tr>
<tr><td>Products</td><td>Product Views
Product Categorisation
Price Table Management
Bulk Pricing Changes
Special Products</td><td>NOTE – the product database has been kindly donated by an existing Ten-25 client. It has costs and pricing that are out of date and have been edited. No commercial information can or should be derived from the data on the MERCHANTER demo system</td></tr>
<tr><td>IBT (Inter-Branch Transfer)</td><td>New Inter-Branch Transfer
Inter-Branch Transfer Views</td><td></td></tr>
</table>

Mill	▪ Mill Order Views	***NOTE** - This operation has had an initial development but is not complete. Please feel free to use, but there are features missing*
Stock	▪ Stock Movements ▪ Stock Holdings – Stock by location ▪ Specified Packs – Specified Pack View ▪ Branch Stock Allocations ▪ All Stock Allocations ▪ Stock Adjustments ▪ Stock Counts	
Reports	▪ Company Overview ▪ Business Analysis ▪ Sales Analysis ▪ Sales Order Processing ▪ Invoicing & Credits ▪ Credit Control ▪ Stock Control ▪ Purchasing ▪ Customers ▪ Products ▪ Suppliers ▪ Sales Targets ▪ Per Method Analysis	Navigate into a reporting area from the menu items. From there you can drill down into other areas, and view data by depot and rep/employee.
New Window	▪ Launch MERCHANTER in a new Tab in the Browser	

CUSTOMER

RECOMMENDED DEMO CUSTOMERS

In order to work through items with some starting data and with a suitable setup, we recommend using the following items:

- Customers
  - **Hyacinth Bucket** (BUCHA) – credit customer
  - **O'Reilly Builders (Torquay)** (OMG001) – cash customer

CUSTOMER DETAILS

- Dashboard
  - Activity
    - Note button – add a note
    - Notes
      - Favourite Star – add to your Favourites
      - Alert – pins to top of list for all users to see
      - Edit – edit note
    - Activity entry
      - Favourite Star – add to your Favourites
      - Add Comment – add a comment to that entry
      - Hide/Show Comments – collapse or expand comments
  - KPIs
    - Credit Remaining – click to go to Credit Control tab
    - Sales (last 30 days) – click to go to Analysis tab
    - Average Sales Value – click to go to Analysis tab
    - Live Quotes – click to go to Orders tab
    - Live Orders
- About
  - General customer settings
  - Click Edit button to amend
- Address
  - Invoicing Address
  - Delivery Addresses
    - New – add new
    - Edit – select and edit an address
    - Delete – please do not delete existing addresses
- Contacts
  - New – add new
  - Edit – select and edit a contact
  - **NOTE** – please do not add live email addresses for contacts outside your organisation
- Credit Control
  - Customer Credit Information
  - Aged debt would be updated from financials system, but there is not one on demo system
- Orders
  - All

    - Draft
    - Quotes
    - Allocated
    - Despatched
    - Invoices
    - Ledger Transactions (would be updated from financials system, but there is not one on demo system)
    - OVERDUE – only appears if an allocated order is later than the Supply Date
- Pricing
    - Customer Price type
    - Customer general discount
    - Advanced Pricing (pricing by product Category/Group)
    - Manual Price Agreements
    - Price lists – lists created and published to customer
- Clauses
    - Customer Specific Clauses
- Notes
    - List of User Notes
- Analysis – Click 'Analysis' button to launch analysis for this customer
    - Sales Analysis
        - select time period (Click on tile)
        - click through bar chart to specific orders
    - Product Preferences – top products for this customer
    - Category Trends – Pie chart by Product Analysis

PRODUCT

RECOMMENDED DEMO PRODUCTS

In order to work through items with some starting data and with a suitable setup, we recommend using the following items:

- Products
    - **12mm x 1220mm X 2440mm Russian Birch Plywood** (12BIRCHCRATE) – Multipack sheet material
    - **12mm x 1220mm x 2440mm WBP Hardwood Plywood Sheet External** (12MARINE) – Simple unit sheet material
    - **Black Bucket** (BUCKBL) – Unit Item
    - **PINE ANGLE 20 X 20MM PINE ANGLE** (SMP016) – timber length product
    - **47 X 100MM REG TREATED C16 GRADE** (47X100ST) – timber by spec + packs

PRODUCT DETAILS

- Dashboard
    - Activity – live
    - KPIs
        - Free Stock in Yard
            - In Yard Figure is live
            - All depots figure
            - Click to link to stock
        - On Order
            - Qty on order
            - Click to view forward movements
            - Next delivery date
            - Average Cost Price
                - ACP figure – live but needs to be currency format
                - LCP figure – live but needs to be currency format
                - Click to open Cost & Prices Tab – to be completed
- About
    - General product settings
    - Click Edit button to amend – not available for Demo Sales User
- Stock
    - Depot Selection
    - Stock Summary
    - Future Stock
- Movements
    - View button – select a movement and click view button or double click to go to order
- Prices & Costs
    - Price Tables associated with the product
- Price Schedule
    - Movement history and future for Base Price of product
- Suppliers
    - Adding supplier prices will show the different suppliers and their current prices

- Analysis – Click graph elements in the Legend (key) to show/hide
    - Sales & Price History
        - Bar 1 – Quoted value by month
        - Bar 2 – Sales value by month
        - Line 1 – Average selling price by month
        - Line 2 – Average cost price by month
    - Stock History & Future (no drill down)
        - Grey area to the left – three months history (past)
        - White area to right – one month future
        - Green Bars – Stock Movements IN by day (purchases, stock adjustments, etc.)
        - Red Bars – Stock Movements OUT by day (sales, stock adjustments, etc.)
        - Sold line – Physical Stock
            - Adjusted by movements in the past
            - Predicted in the future
        - Dotted line – free stock
            - Adjusted by movements in the past
            - Predicted in the future

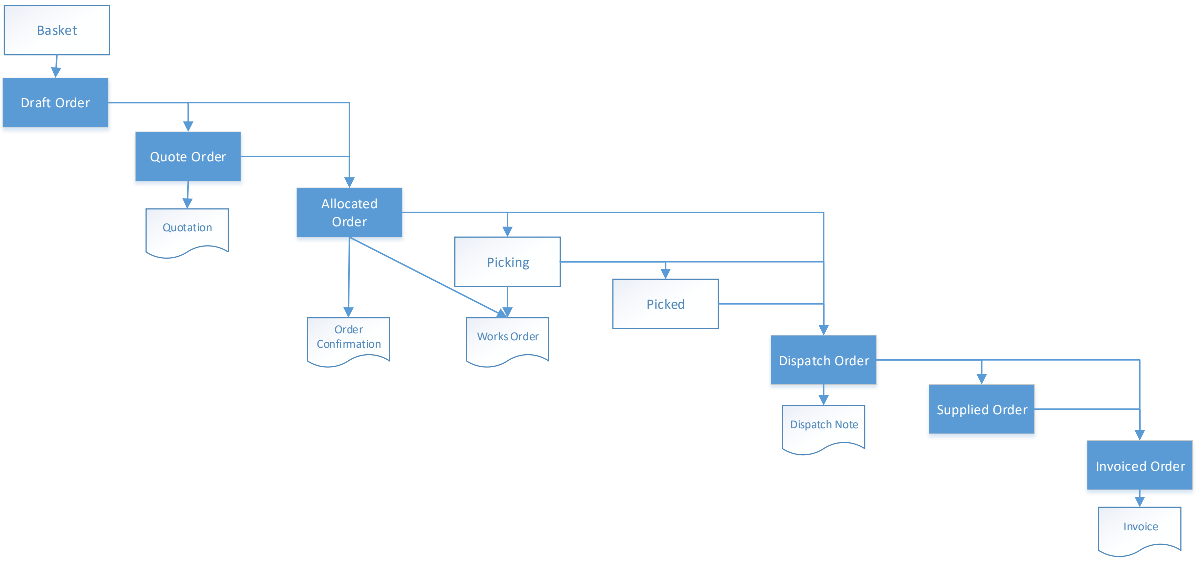
SALES ORDERS

ADDING A NEW ORDER

New orders can start from several places in MERCHANTER:

- 'New' dropdown – select from the banner in the top menu and choose Order
- From a customer record there is a New Order button top right
- From the Basket
    - After adding items to the basket either
        - process a Retail Sale – fast sale with minimal amendment
        - Add to Draft Order – full order management
        - Add to the latest order you were working on
        - New Purchase Order

ORDER FLOW



Orders move through a series of statuses during processing: (Grey items are available in MERCHANTER but switched off in the demo system)

- Draft (*NEW for MERCHANTER*) – this is a notepad style order where you can pull together the order information with no impact on credit limits, stock allocations etc. Change customer, header and product details freely
- Quote – when a quote is issued to a customer a Draft Order automatically becomes a Quote Order
- Allocated Order – This is when the customer has placed the order with you, but the good still need to be supplied
- Picking (*NEW for MERCHANTER*) – this optional status is for generating the Works Order at the point the picker is due to start picking the order. This minimises the time when a customer may wish to make amendments to the order
- Picked (*NEW for MERCHANTER*) – this optional status is when the goods for an order have been picked
- Dispatch – this is when the order is out for delivery to the customer. Any back order items will generate a new allocated order with links to the original order.

- Supplied (*NEW for MERCHANTER*) – this is when the driver has confirmed delivery, or the customer has collected the goods
- Invoice – This is when the order has been invoiced to the customer

APPENDIX 1 – KPI TILES

Each KPI is available for Company, Active Depot, Specific Depot, Active User, Specific User

- Invoicing
  - Orders for invoicing
- Credit Control
  - Customers over credit
  - Customers on stop
  - Customers near credit limit
  - Orders on hold
- Stock Control
  - Orders without stock
  - Low stock items
- Purchasing
  - Purchases overdue
  - Purchase orders received today
  - Purchase orders expected tomorrow
  - Purchase orders due in the future
  - Direct purchases to be placed
- Dispatches
  - Dispatches overdue
  - Dispatches due today
  - Dispatches due tomorrow
  - Dispatches due future
- Sales
  - Sales today
  - Sales last 7 days
  - Sales month to date
  - Quotes today
  - Live quotes
  - Customers on hold
- Pricing
  - ACP changed
  - Special offers
  - Manual prices expiring
- Returns & Credits
  - Credit notes issued
  - Credit notes for approval
  - Returns for collection
- Directs & Back-to-Backs
  - Directs outstanding
  - B2Bs ready