Merlin
BUSINESS SOFTWARE

CORE
MODULES

Contact Relationship Management

Merlin's Contact Relationship Management (CRM) has been designed to proactively manage accounts, relationships, and interactions with customers, prospects and suppliers – ensuring relationships are managed in a professional and efficient manner.

Unlimited Records
Companies and Contacts
Create unlimited customer, supplier, and prospect records, with unlimited contact records and delivery addresses per company.

Alongside all of the standard details you would expect of a CRM system (i.e. account number, address, telephone, fax, email, website, accounts etc.) Merlin also holds approximately 40 user-definablefields, so you can store the information relevant to you.

Features
Intelligent Menu
Merlin's Contact Management menu predicts and shows the options you're most likely to need next on any given page.

Full Integration and Archive
Merlin records all activity against the relevant customer, prospect or supplier i.e. sales, quotes, purchases etc. So there's no duplication of data and provides a full historical archive.

Notes
Full Transparency
Store notes against companies or contacts and view them later by contact or select all for a company-wide view.

Call Management
Schedule Appointments
Merlin automatically populate your operator's diaries, allowing them to quickly see all appointments scheduled for the next month, week, day or a given date range. Also ideal for your Accounts team when chasing payments and your Purchasing team chasing deliveries.
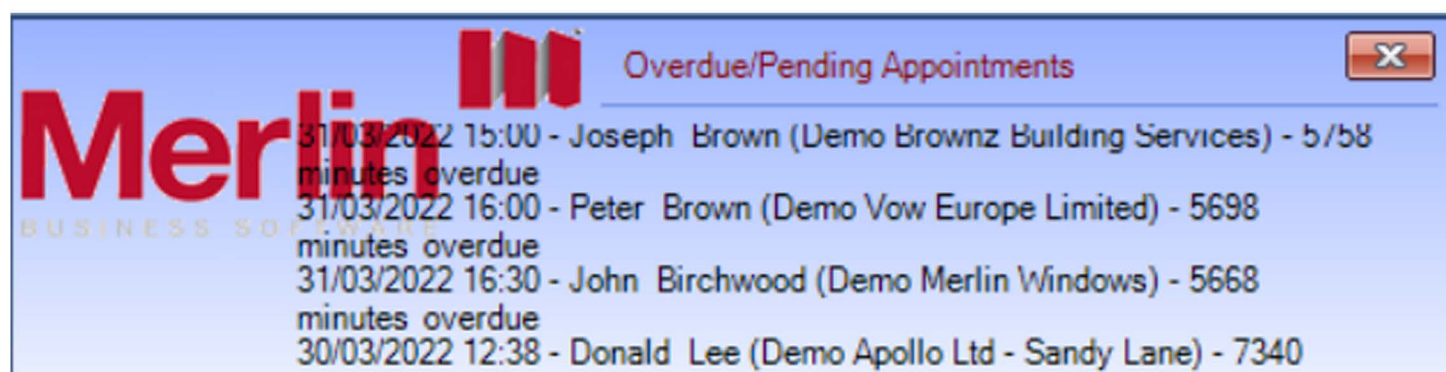
Sales Pipeline
Full visibility of sales pipeline with real-time reporting from Merlin.
Log potential orders against contacts within Call Management and indicate an estimated close date, order value, potential margin, the stage the sale is currently at and lead source. Enabling you to measure the success of the various channels of lead generation.

Campaign Management
Create Targeted Lists
Log potential orders against contacts within Call Management and indicate an estimated close date, order value, potential margin, the stage the sale is currently at and lead source. Enabling you to measure the success of the various channels of lead generation.

Overdue/Pending Appointments
31/03/2022 15:00 - Joseph Brown (Demo Brownz Building Services) - 5758 minutes overdue
31/03/2022 16:00 - Peter Brown (Demo Vow Europe Limited) - 5698 minutes overdue
31/03/2022 16:30 - John Birchwood (Demo Merlin Windows) - 5668 minutes overdue
30/03/2022 12:38 - Donald Lee (Demo Apollo Ltd - Sandy Lane) - 7340

Microsoft Outlook™ integration
No More Copy & Paste
Save incoming and outgoing emails in Outlook directly into a contact's notes within Merlin. This can be done with one click, by automatically matching the sender's email address.

Merlin enables you to sync all calender appointments within Merlin to your Outlook calender.

Reporting
Monitor & Analyse
All activity on a given or selected range of accounts with Crystal Reports™.

Business Intelligence Dashboard

Merlin presents up to date data from all areas of your business, providing the right information at any time. Our fully customisable Dashboard enables you to organise all business information all in one place. This module comes with 3 stages that are tailored to meet your business requirements.

Real-time Dashboards

Merlin presents predefined reports giving you an up-to-the-minute picture of your business.

All Merlin Dashboards can be personalised, allowing the user to only see information relevant to them and their team.

Some example reports are:

Customer Balances - An aged debtor report by 30, 60, 90, 120+ days allows you to identify liabilities and better manage cash flow/ debt collection.

Order Value Today - See today's total sales in GBP and drill down to see spending by account - immediately recognise when a key account is reducing spend.

Top 10 Customers by Profit - Nurture high profitable accounts with a list of your Top 10.

Sales Value Year on Year - Measure your year-to-date's performance against that of last year, identify trends and consider product promotions during times of the year where trade is traditionally slow.

Salesman by Sales Value - Monitor Salespersons performance year-todate, identify which members of your sales force are exceeding their target and those that require support.

Age Debtor Report - Easily identify and better manage cash flow / data collection

Smarter Decisions - Make smarter decisions with an at-a-glance view of your business performance

Customer Driven Development

At Merlin we believe strongly in customer feedback to move our products forward.
All customers have the opportunity to put their ideas forward for what they'd like to see in future developments of the Dashboard.

Mobile Dashboards
Run your business on the move
Access your dashboard on any Internet Browser.

Supported devices:
- PCs and Apple Macs
- Laptops and Macbooks
- Tablets and iPads
- Andriod and iPhone

Merlin Analytics powered by Phocas
Merlin Analytics delivers advanced business intelligence and distributor analytics across manufacturing, distribution, wholesale and merchants.

With our new out-of-the-box standard integration built for non-technical users, you can easily get data in seconds on sales, inventory, forecasts, prices, profit margins, people and budgets.

Get complete flexibility from an analysis point of view. Any drill path, any direction, and date range in seconds. Say goodbye to pre-defined reports.

Financials

Merlin's fully integrated Management Accounting system incorporates Sales, Purchase and Nominal Ledgers with full Sales and Purchase Ledger transaction posting and unlimited reporting and analysis.

Purchase Ledger

Aged Creditors
Easy access to and of outstanding supplier balances.

Invoice Posting
Post expense invoices or invoices matched to orders raised within the POP module.

Purchase History
Full archive of purchase transaction history, linked to historical purchase orders and product details. Along with a full drill down of transactions into the updated Nominal Ledger accounts.

Suggested Payments
Fully automated payment suggestion based on supplier payment terms and outstanding transactions on the Purchase Ledger.

Sales Ledger

Aged Debtors
Get easy access to and reporting of outstaning customer balances.

Account Receipts
Post cash receipts to customer accounts, which is linked directly to Credit Control, taking customers 'off-stop' if required.

Sales Invoices
Access to full archive and ability to re-print on demand.

Sales History
Full archive of all sales transaction history, with the ability to filter and refine results.

Credit Control
Full drill down into customer balances and transactions.

Debt Letters
3 Levels of debt letter, configurable by customer account.

Nominal Ledger

Merlin offers numerous Nominal Journal Posting routines allowing manual Journal Postings or Automated Journal postings in consecutive periods or non-consecutive periods.

Prepayment and Accrual Journals
Generating automatic reversal of journal postings into subsequent Journal Posting periods.

Recurring Journal Postings
Allowing journals to be saved for subsequent retrieval edit and posting in the subsequent period.

VAT Return
Abiltiy to reprint sales invoices from VAT transaction details with Merlin
Fully integrated Sales & Purchase Intrastat reporting, which links VAT return to Stock Control, Sales Ledger and Purchase Ledger.

Intrastat Reporting
Full traceability with fully integrated system, which embeds both the Sales and Purchase Ledgers within the Customer and Supplier contact details.

EC Sales Reporting
Allows for EC Sales Reporting, providing a full archive of Sales Invoice and Customer Account.

Multi Company
Merlin also has the ability to process Multi-Company transactions, including transaction postings such as Intercompany Journal postings and Group Journal postings. This allows a Journal to be copied across any company in a Merlin system.

Multi-Currency
Merlin processes Multi-Currency transactions including Period End Un-Reconciled transaction reporting and Historical Reconciled transaction reporting for multi-currency.

Features
Automatic Calculations
Manage your Fixed Assets, providing automatic calculations to both straight line and reducing balance depreciation methods.
The choice to set up automatic depreciation at period end (or continue to run it manually).

Full Auditability
Merlin provides full auditability and traceability of all asset records, nothing is deleted.

Purchase Order Processing

Merlin makes Purchase Ordering easy, linking with the Stock Management, the Purchase Order Processing (POP) module facilitates real-time, accurate stock replenishment. Merlin can make recommendations based on live data. Merlin can also link Sales Orders to Purchase Orders for seamless transitions and a reduction in paperwork.

Purchase Ordering Made Easy

Ordering
Merlin uses live data to provide purchase recommendations.

Real-Time Stock Replenishment
Merlin produces a replenishment report and raises the necessary purchase orders for inter-branch transfers and consignments.

Direct Orders
Merlin seamlessly handles SOP to POP transfers and reduces paperwork.

Purchase Orders
Request quotations from a number of suppliers with one enquiry.

Enquiries
Enquire by part number, order number, invoice or supplier number.

Back Orders
Item not in stock? Merlin will handle Back-to-Backs, Direct Orders and Back Orders, it will even automatically flag stock for release on GRN.

Suppliers Price Books
Easily import and store all your suppliers price books for look-up, including manufacturers part numbers.

Benchmark
Copy estimates to other suppliers to obtain the best possible prices.

Quick Look-Up Tools
View supplier and stock files quickly and easily without leaving purchase order entry.

Purchase Order Optimisation:

Optimise your Stock Levels with Merlin's Suggested Purchase Orders.
Merlin automates your purchasing process and make it as simple as possible without losing control. You can review, amend and generate the purchase orders in one process from a wide range of selection criteria:
- Number of weeks stock
- Range of Suppliers
- Range of Product Groups
- Seasonality (Time of year)
- Lead Time

You can also append new suggested orders to existing orders to take advantage of any bulk purchasing opportunities, reduced carriage, and a reduction in paperwork.

Purchase Order Review

Manage the approvals of Purchase Orders before final release.

Placing Orders

Distribute Purchase Orders by Suppliers Preferred Method

Merlin automatically selects the predefined mode, per supplier, in one process.
- Electronic Data Interchange (EDI)
- Email
- Fax
- Print

Goods Received

Book In Orders in Seconds

Auto-match lines on the GRN to the originating Purchase Order and quickly handle discrepancies.
Barcode scanning optional.

Merlin can also handle any back order issues caused by low stock levels by automatically flagging stock for release on Goods received Notes (GRN).

Integrated with Merlin's Other Modules
Seamlessly linked with Stock Management
Seamlessly links Sales Orders with Purchase Orders for seamless transition.

Sales Order Processing

Maximise every sales opportunity with Merlin. Create sales orders and quotations quickly and easily at the trade counter, sales office and via the web. There's even an app for the mobile sales team.

Maximise Every Sales Opportunity

Cross Selling
When adding lines to an order Merlin will prompt you to cross-sell by suggesting suitable items. For example, the salesperson would be prompted to offer cement when a customer is purchasing bricks.

Alternative Products
Let Merlin offer a list of alternative products when an item is marked as out of stock or discontinued. Merlin even manages and promotes your special offers too.

Special Offers
Merlin notifies your sales staff od currect special offers. For example, quantity breaks and "BOGOF".

Customer Special Pricing
Quickly and easily set-up customer special pricing in a number of ways for individual accounts or groups of customers.

Notes & Warnings
Set warnings and/or require authorisation when a user attempts to process an order outside a given parameter i.e. minimum gross profit margin. Notes can be set to appear to remind staff to get customer order numbers or to advise the customer that their payment is overdue.
Merlin can also be configured to set default due dates, delivery methods, or even automatically charge carriage for a particular set of circumstances.

Sales Order Routines
Get the right information at the right time with intelligent, in-built functions.
Ensure your sales operators have all the relevant information for processing orders.

Purchase History
Merlin displays the customer's purchase history, so you can see what they have previously purchased and at what price.

Cherry Pick
Merlin's Cherry-Pick function you can duplicate previous orders in their entirety very quickly. You can cherry pick and load items from previous orders or search your customer's entire purchase history for a specific product.

Negotiate Pricing
Merlin's haggle function lets you see exactly what is happening with the margins on products as you negotiate pricing. Once you have agreed on a price, you can even save it as the customer's special price for use on future orders.

Stock Control

Merlin provides you with control over all areas of Stock held across all your business locations. With Merlin you are able to set-up for full traceability and control over all your product range, locations, suppliers, batches, shelf life, and consignment stock.

Optimise Stock Investment

Stock Take
Streamline your stock take by defining particular groups, aisles, bins etc. (You are able to use HHT application for an even more efficient process.)

High Availability
Sophisticated stockholding and sourcing means you can readily fulfil customer demand.

Avoid Overstocking
Prevent dead money from sitting on the shelf by more accurately predicting demand.

Range Management
Fine tune your product catalogue using data from multiple suppliers.

Minimise Slow Movers
Stay ahead of the curve and optimise your stocking levels by easily identifying trends.

Supply Chain Management
Easily action, track and update stock movements between suppliers, depots, locations and customers.

Returns Management
One process to send the returns form to the customer and book the goods back in.

Ecommerce Link Up
One stock file feeds your in-house sales function, which can update your website with stock information.

Technical Information
Have technical information to hand, to assist sales and purchasing staff.

Full Traceability and Batches
Merlin offers traceability at batch and/or item level (Serial Number) and can accomodate Test Certificates and Certificates of Conformity.

A Single Database
Improve Efficiency with Single Data Capture
A single, highly efficient SQL database of product records used for all input and output, linked to all methods of trading with all stock movements recorded and archived.

Sourcing
Manufacture
Merlin's optional production control allows you to create BOMs - made-to-order or for stock.

Assemble
Create or amend Kits - assemble to order or for stock.

Purchase
From a range of suppliers with the option of EDI.

Multi Depots and Locations
Multi-depot
Maximise stock utilisation over unlimited branches and warehouses including consignment stocks.

Multi-bin
Speed-up dispatch by picking in bin order, with the option to consolidate pick lists.

Barcodes
Reduce receipting, picking, dispatching and stock checking errors by accurately scanning stock movements.

Inter-branch transfers
On demand or replenishment, triggered by minimum and maximum stocking levels.

Analysis
Real-time data is presented through the Dashboard, this can be used in Reports and exported to Microsoft Excel. Providing you with the relevant information and identifying whether an item is active or redundant.

Integrated with Merlin's Warehouse Management Module
Manage and Control warehouse stocks
- Avaliable on Handheld Terminal Devices with 2 modules (Auto Stock Checking & Goods Despatch and Receipt)
- Andriod & Microsoft Windows