

Meridian

Product Description and Functional Specification

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About this document

This document describes Meridian version 1.1.10.0: what the product is for, the functions it provides, its architecture, its data-exchange interfaces, the licence plans and the limitations of this version.

It is written for the customer's specialists who assess the product against their requirements and for administrators who plan its roll-out. Installation is covered in the Installation and Administration Guide, day-to-day work in the User Guide.

1. General information

1.1. Name and version

The product is called Meridian. This document describes version 1.1.10.0. The developer and vendor is iMobile. The product identifier used in licences is `meridian`.

1.2. Purpose

Meridian keeps warehouse and sales records: goods and stock balances, receipts, transfers, returns and write-offs, price lists, sale documents and their invoices, counter sales in a cashier window, discounts and loyalty cards. It also keeps customers and contact persons, tasks and reminders, planned and actual money movements, and e-mail correspondence.

1.3. Field of application

Meridian is intended for small and mid-sized trading and service companies: retail and wholesale, car service and spare-parts shops.

Meridian is not bookkeeping or tax software and it is not a fiscal cash register. Statutory accounting, tax reporting and any fiscal registration of sales are done with the customer's other systems.

1.4. Class of software

Business application software: a desktop client–server system for warehouse and sales accounting with customer relationship management (CRM) elements.

2. Functions

Every section opens inside one program window from the navigation pane on the left and works on the same database. There are no separately purchased modules.

2.1. Warehouse and goods

- warehouses and storage places arranged in a hierarchy; warehouses belong to the customer's own companies, and an employee sees the warehouses of the companies he or she is linked to;
- product cards with groups, barcodes, images and kits; mass editing of products;
- a list of jobs and services: a job is sold in the same document as goods but does not change stock; a job can have a barcode;
- a warehouse report with balances and turnover for a period.

2.2. Stock documents

The section Warehouse → Receipt / issue holds the stock movement documents. The operation type of a document is one of: receipt, transfer between warehouses, return, write-off, opening balance. A document has a header and lines. Balances change when the document is posted, that is, when its status becomes “Posted”; the statuses “Not posted” and “Reserve” also exist. Balances and document totals are recalculated by database triggers, so the result is the same whether the document comes from the program or through the HTTP API.

2.3. Price lists and sales

- price lists with a mark-up given as a percentage or as an amount;
- a sale document: warehouse, customer, price list, lines with goods and jobs; the price comes from the price list, and posting the document writes the goods off the warehouse;
- an invoice for a sale: created from the sale card and split into positions; its payment state (not paid, partly paid, paid, overpaid) follows the registered payments.

A sale document cannot be saved without a price list.

2.4. Cashier window

The section Warehouse → Cash desk is for counter sales with a barcode scanner. A receipt is the same sale document as in the Sales section and is posted in the same way. Everything is done from the keyboard and no window opens on top of the cashier screen: F2 cash, F3 card, F4 barcode field, F5 pick from the warehouse, F6 quantity, F7 delete a line, F8 amount received, F9 print, F12 close the receipt, Ctrl+Del void the receipt.

A payment is recorded as income in a wallet of the Budget section: cash and card payments go to different wallets. The receipt is printed by a Python script. The script text is stored in the database and can be changed by a user who holds that right; the script receives the receipt data only and has no access to the database.

Meridian does not communicate with fiscal printers or payment terminals: the payment kind “card” is only noted in the records. The printed receipt is a non-fiscal slip.

2.5. Discounts and loyalty cards

Discounts are defined as rules in the section Warehouse → Discounts. The following are supported:

- a manual discount on a line and on a document, with a cap on the percentage;
- a personal discount for a customer and for a customer category;
- a discount on a product, a product group or a job;
- a discount by quantity or amount, including tiers;
- a promotion for a period, by days of the week and hours;
- a promo code and a coupon with a limit on the number of uses;
- a birthday discount;
- an “N+1” gift;
- a special price and a switch to another price list;
- loyalty card levels by turnover, earning bonuses and paying with bonuses;
- rounding of the total.

How discounts combine is a setting: the best one wins, percentages are added up to a cap, or discounts are applied one after another. A loyalty card is tied to a phone number; a second active card cannot be issued

for the same number.

2.6. Vehicles and part lookup

The section Vehicles → Vehicles and part lookup keeps customers' vehicles and finds parts for a vehicle by applicability, cross-references and replacements; the chosen items are carried into a sale document. The catalogue of makes, models and modifications and the applicability data are stored in the database. They can be loaded from an external catalogue service if one is available; no such service is part of the delivery.

2.7. Customers, tasks and reminders

- Job → Clients and Contacts: counterparties with an organisation type (our company, supplier, customer), bank accounts, fields of activity and contact persons;
- Job → Tasks: tasks with an assignee, due date, priority, “important” and “urgent” marks, a checklist, comments, a change history, repetition and a reminder before the due date;
- Job → Reminders and Job → Employees: reminders and the employee list;
- Job → Documents: the list of documents. Creating and editing a document card is not available in version 1.1.10.0.

2.8. Budget

The section Budget → Plans and facts keeps wallets (an account, a cash box, a card), plans arranged as a tree and actual money movements. A wallet balance and the deviation from a plan are calculated from the movements and are not stored separately. Payments from the cashier window and payments of sale invoices arrive in the budget as movements.

2.9. Mail

The Mail section works with employees' mailboxes: folders, sorting rules, reading and writing messages, sending over SMTP and receiving over IMAP, including TLS. A received message can be processed by a Python script stored in the database; this processing is off by default.

2.10. Administration and access control

The section Settings → Administration has pages for employees, paths, reference lists, user groups, dynamic settings, print document packages, the work calendar, the organisation structure and roles.

A user's rights are set in two layers:

- the employee's section profile defines which sections are visible and what is allowed in them: add, edit, copy, delete, export, report;
- a role defines access to individual buttons, fields and grid columns on a screen: full access, read-only or hidden.

A role is given to an employee personally or to a department; in the second case it also applies to subordinate departments. The set of roles of an employee is resolved by a database function. There are 13 standard roles: Administrator, Head of company, Sales manager, Head of sales, Cashier, Storekeeper, Procurement, Accountant, Freight dispatcher, HR officer, Office manager, Call-centre operator and Auditor (read-only). Applying a standard role writes the rights for every screen at once and removes the employee's previous personal roles; roles received through a department stay in force.

Meridian has no single log of user actions. Database records keep the author and time of creation, of the last change and of the deletion mark; changes to tasks are written to the task history.

2.11. Regional functions

The page Settings → Regional features lists functions that apply to one country only. Such a function is shown when the region of use matches its country or when it is switched on explicitly. The region is a setting; by default it follows the interface language. In the international configuration no regional function is shown. The installation package contains the files of one regional module — a Python package with a Python 3.12 runtime; that module is described in the documentation edition for its country.

2.12. Help, About and interface language

Settings → Help opens the built-in help. Settings → About shows the version, the licence state, the used and available seats and the machine fingerprint; activation, licence refresh and the update check are started from this window. The interface is available in English and Russian.

3. Architecture and components

Component	Purpose	Location
The program <code>Meridian.exe</code>	The user's workplace	The customer's Windows computers
PostgreSQL database	Data storage; accounting rules in functions and triggers	The customer's server
Database kit	Deploys and upgrades the database structure with PowerShell scripts	Run by the administrator
The tool <code>MeridianDbTool.exe</code>	Tests the connection and writes the connection file; the same executable is the HTTP API service	The <code>tools</code> folder of the program
iMobile account server	Issues and checks the licence	At the vendor

Workstations connect to the database directly over the network. Accounting rules — writing goods off, recalculating document totals, the task history, resolving roles — run in the database. Discounts are calculated by the program.

4. Interfaces and data exchange

Interface	Protocol and format	Purpose
Database	PostgreSQL protocol over TCP, port 5432 by default, not encrypted	The program's work with data
Account server	HTTPS, JSON	Activation and licence check
Vendor's site	HTTPS, the file <code>latest.json</code> and the MSI package	Update check and download
The customer's mail servers	SMTP, IMAP (including TLS)	Sending and receiving mail
Exchange-rate source	HTTPS, XML published by the Bank of Russia	Loads exchange rates at sign-in; turned off with the setting <code>CURRENCY_RATE_AUTO</code>
HTTP API service	HTTP, JSON, UTF-8, a token in the <code>Authorization</code> header	Access for external applications to goods receipts, stock, products, part lookup and online-shop orders
Grid export	Excel file	Exporting the data of on-screen grids

The HTTP API service works on the same database and calls the same accounting functions as the program. Requests that change data accept an `Idempotency-Key` header that prevents a repeated request

from being executed twice. The service does not encrypt the connection itself: for access from outside networks a reverse proxy with HTTPS is placed in front of it. The scripts that install the service and a mobile application are not part of the download set.

5. Editions and limitations

5.1. Licence plans

Plan	Seats	Term
meridian-free-10	10	No time limit, free of charge
meridian-25	25	No time limit
meridian-50	50	No time limit
meridian-100	100	No time limit

The functions are the same in every plan. A seat is taken by an employee who has a login and the “active” tick; the number of computers is not limited. For the first 14 days after the first start the program works without activation.

5.2. Limitations of this version

- the program issues no fiscal receipts and does not control cash-register equipment;
- every workstation connects to the database under one PostgreSQL service role whose name and password are built into the program; the database connection is not encrypted; access to the database server is restricted by the customer's network controls;
- without contact with the account server the program works for no more than 14 days from the issue of the licence;
- there are no ready-made print templates for documents and no built-in backup;
- the telephony section, the deals, claims, correspondence, business-trip and tender sections and the document card are not available in version 1.1.10.0;
- receiving mail over POP3 does not store messages; IMAP is used for receiving;
- the navigation pane does not scroll: with a window lower than about 1130 pixels the bottom sections cannot be reached with the mouse;
- the pages of the installation package are in Russian, and some preset values are supplied in Russian.

6. Environment requirements

- workstation: Windows 10 or Windows 11 (x64), Windows Server 2016 or later;
- database server: PostgreSQL 12 or later, 16 recommended;
- network: access from the workstations to the PostgreSQL port; outbound HTTPS access to `accounts.new-imobile.com` and `new-imobile.com`;
- to deploy the database: PowerShell 7 and `psql.exe` from a PostgreSQL distribution.

Detailed requirements are given in the Installation and Administration Guide.

Document history

Document version	Date	Product version	Change
1.0	2026-10-06	1.1.10.0	First issue