

iMobile

Meridian

User Guide

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About this document

This guide describes how a user works with Meridian version 1.1.10.0: signing in, the main warehouse and sales operations, the cashier window, customers and tasks, and what to do when something does not work.

It is written for the customer's employees who work with the program. Installation and configuration are covered in the Installation and Administration Guide.

1. Purpose

Meridian is used to keep warehouse and sales records, to sell over the counter in the cashier window and to keep the company's customers, tasks and money records. The user works in one window whose sections are opened from the navigation pane on the left.

Meridian is not a fiscal cash register: the receipt printed by the cashier window is a non-fiscal slip.

2. Conditions of use

- the program is installed on the workstation and connected to the company's database;
- the administrator has created a login and a password for the employee and has granted rights;
- the workstation can reach the database server over the network;
- for the cashier: a barcode scanner that works as a keyboard and, if needed, a receipt printer are connected.

The sections and buttons a user sees depend on the rights granted. If a section or a button is missing, ask the administrator. Changed rights apply after the next sign-in.

3. Getting started

3.1. Signing in

1. Start the program from the Start menu, folder Meridian. The Authentication window opens.
2. Check the name of the database connection in the Configuration field. The button at the end of the field opens the list of connections; the chosen one is remembered.
3. Enter the user name and the password and press "Log in".

A mistake in the name or in the password produces the same message, "Wrong login or password". A password is reset by the administrator on the employee card.

During the first 14 days after the first start the program says at sign-in how many days are left before activation becomes mandatory. Activation is done by the administrator.

3.2. Program window and sections

Category	Sections
Warehouse	Warehouses, Receipt / issue, Warehouse report, Price, Sales, Jobs, Discounts, Cash desk
Settings	Administration, Access and roles, Help, About, Regional features
Mail	Mail
Contacts	Contacts
Vehicles	Vehicles and part lookup

Category	Sections
Job	Clients, Documents, Employees, Reminders, Tasks
Budget	Plans and facts

A section opens when its navigation item is clicked and is shown in the right part of the window. Lists share the buttons Add, Edit, Delete and Refresh; cards have Save.

The interface language is switched from the system menu of the window: `Alt+Space`, the Language item. The built-in help opens in Settings → Help.

4. Main operations

4.1. Receiving goods into a warehouse

1. Open Warehouse → Receipt / issue and press Add.
2. In the document header choose the operation type “Receipt” and the warehouse, and enter the subject and the date of the document.
3. Open the goods list of the document with “Product list (Insert)”. There, press “Add from products”, choose a product from the catalogue and enter the quantity and the purchase price. A product that does not exist yet is created in the same catalogue.
4. Set the status “Posted” and press Save.

Goods appear in the balances only after a posted document has been saved. A document with the status “Not posted” does not change the balances.

A user sees the warehouses of the companies he or she is linked to on the employee card, and warehouses that belong to no company.

4.2. Transfer between warehouses

1. Open Warehouse → Receipt / issue and press Add.
2. Choose the operation type “Transfer”, the warehouse the goods leave and the receiving warehouse.
3. In the goods list of the document press “Add from the warehouse”, choose a product from the warehouse stock and enter the quantity.
4. Set the status “Posted” and press Save.

A transfer needs at least two warehouses in the database.

4.3. Price list

1. Open Warehouse → Price and press Add.
2. On the price list card enter the name, the mark-up, the currency and the “active” mark.
3. Open the price grid of the price list, type the price in the row of each product and press Save.

A sale document cannot be saved without a price list. A zero price in a sale line means the product has no row in the chosen price list.

4.4. Sale and invoice

1. Open Warehouse → Sales and press Add.
2. In the document header choose the warehouse, the customer and the price list.
3. In the goods list of the document press “Add from the warehouse”, choose a product from the warehouse stock and enter the quantity. The price comes from the price list. Jobs and services from

Warehouse → Jobs are added to the same document.

4. If needed, enter a discount on a line or on the document. Discounts defined by the rules in Warehouse → Discounts are calculated by the program.
5. Set the status “Posted” and press Save. The goods are written off the warehouse.

An invoice for the sale is created with the “Invoice card” button on the sale card; it can be split into positions with “Add sub-plan”. The payment state of the invoice changes as payments are registered: not paid, partly paid, paid, overpaid.

4.5. Counter sale in the cashier window

The window opens in Warehouse → Cash desk. The warehouse (“Store”) and the price list are fixed by the settings or chosen by the cashier between receipts. Everything is done from the keyboard.

Key	Action
F4	Go to the Barcode field
F5	Pick a product from the warehouse on a panel inside the window
F6	Change the quantity of the selected line
F7	Delete a line
F2, F3	Payment kind: cash, bank card
F8	Enter the amount received from the customer
F9	Print the receipt
F12	Close the receipt
Ctrl+Del	Void the receipt

To make a sale:

1. Scan the barcode of the product or type it in the Barcode field and press **Enter**. To enter several identical items, type the quantity and an asterisk before the code, for example 3*.
2. Repeat for the other products. The total is shown in the Total field.
3. Choose the payment kind with **F2** or **F3**. For a cash payment press **F8** and enter the amount received; the program shows the change.
4. Close the receipt with **F12**. The sale is posted, the goods are written off the warehouse and the payment is recorded in the budget.

Messages to the cashier appear in a line at the bottom of the window. If no wallet is set for the payment kind, the receipt is posted and the program says that the payment has not reached the records. If printing fails, the sale stays posted; the reason is shown in the message line, and printing is repeated with **F9**.

A product must be received into the cashier's warehouse and priced in the cashier's price list.

4.6. Discounts and loyalty cards

Discount rules are kept in Warehouse → Discounts: the kind of discount, what it applies to (a customer, a customer category, a product, a group, a job), tiers by quantity or amount, the validity period, days of the week and hours, promo codes and coupons. Loyalty cards are kept there too: a card is tied to the customer's phone number, its level depends on turnover, and bonuses are earned and spent at a sale. A bonus balance cannot become negative.

4.7. Customers and contacts

1. Open Job → Clients and press Add.

2. Fill in the counterparty card: the name, the registration details and the organisation type.
3. Save the card. Bank accounts, fields of activity and contact persons are added on the card.

The organisation type decides where a counterparty is used: warehouses belong to our companies, receipts come from suppliers, sales go to customers. The contact persons of all counterparties are available in the Contacts section. A card opens with a double click on a list row.

4.8. Tasks and reminders

1. Open Job → Tasks. The counters at the top show “Overdue”, “Due today”, “Due this week”, “Open, mine”, “Assigned by me” and “Done in the period”.
2. Press “New task” and fill in the card: the name, the assignee, the due date, the priority and the marks “Important”, “Urgent” and “Keep under control”. If needed, fill in the checklist and the Repeat and Remind fields.
3. Press Save.

A due date is a date and means the end of that day. A finished task is marked with “Mark as done” in the list or by changing its state on the card. When a repeating task is closed, the program creates the next one. Changes to a task are shown on its card under History, comments under Comments. Task reminders are generated when the Tasks section is opened and are shown in Job → Reminders.

4.9. Budget

The section Budget → Plans and facts keeps wallets, plans and money movements.

1. Open the wallet list with the Wallets button and create the places where money is kept — an account, a cash box, a card — with “New wallet”.
2. Create a plan with “New plan”: the name, the period and the planned income and expense. A subordinate plan is added on the plan card with “Add sub-plan”.
3. Enter an actual money movement on the plan card with “Add movement”, giving the wallet and the amount.

The wallet balance and the fulfilment of a plan are calculated from the entered movements. Payments from the cashier window are recorded here automatically.

4.10. Finding parts for a vehicle

1. Open Vehicles → Vehicles and part lookup.
2. Choose the customer's vehicle or create it: make, model, modification, VIN and registration number.
3. On the “In stock” tab look through the parts that fit the vehicle, including cross-references and replacements.
4. Tick the items you need and press “Build a sale”: the program creates a sale document from them.

The lookup uses the applicability data held in the database. The “From the catalogue” tab and “Refresh from the service” work if the administrator has connected an external catalogue service.

4.11. Mail

The Mail section shows the folders and messages of the mailboxes the administrator created on the employee card. Messages are received automatically at a set interval. A message is opened from the list; a new message is written in the editor and sent through the outgoing mail server of the mailbox.

4.12. Exporting data

Grids on the screens are exported to Excel by the grid itself. Export also works when the program runs in view-only mode.

5. Messages and typical difficulties

Symptom	Cause	Action
"Wrong login or password"	A mistake in the name or the password	Check the keyboard layout and capitals; ask the administrator to reset the password
A message that the account is disabled	The "active" tick has been cleared for the employee	Ask the administrator
The program does not reach the sign-in window or says it could not connect	No connection to the database	Check the connection in the Configuration field; ask the administrator
The warehouse you need is not in the list	The employee is not linked to the company of the warehouse	Ask the administrator
A product was entered but there is no balance	The receipt document was not posted or not saved	Post and save the document
The price in a sale is zero	The product is not in the price list	Add its price to the price list
A sale document cannot be saved	No price list is chosen or none exists	Create a price list
A grid is empty although data should be there	A database query failed	Tell the administrator; the error is written to the program log
Nothing can be saved	The program runs in view-only mode because of the licence	Ask the administrator
A new employee cannot be created	The licence seats are used up	Clear the login or the "active" tick of someone who has left, or extend the licence
The bottom navigation sections are not visible	The window is lower than about 1130 pixels and the navigation does not scroll	Maximise the window or raise the screen resolution
The receipt is not printed	Python is missing on the workstation or the printer is unavailable	The sale is posted; ask the administrator

The program log is in the folder %APPDATA%\Imobile\Meridian\Log. When contacting support, give the version and the machine fingerprint from Settings → About.

6. Finishing work

Before leaving, save the open cards and close an unfinished receipt in the cashier window. The program is closed with the close button of the window. Unsaved changes on open cards are not written. To sign in as another user, start the program again.

Document history

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