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## *'Optima2'* Print Management System

### Back-office 'print and deliver' system features

Designed to ensure ease of use yet give maximum functionality and overall versatility Optima2 back-office system has easy to use features way above simply Enquiring, Quoting, Ordering etc. Optima2 is a fully featured and extremely versatile Print Management System. The print and deliver features shown in the list below is not an exhaustive. For Optima2 stock system information please refer to the separate Optima2 Stock System feature list.

#### **'Job' entry/enquiry features**

- Any 'job' can be entered rapidly and specified with ease; if it can be produced, then it can be specified within Optima2.
- Copy job capabilities afford the user an easy to use method to create an exact repeat, amend repeat or copy job function; this is accompanied by an automatic repeat history system ensuring the correct job is repeated.
- Last 'Job' order number details and the supplier acknowledgement numbers are automatically carried through for information within a 'Repeated Job'; these details are sent on the 'Enquiry' to the incumbent supplier only.
- Versatile search capabilities afford the user job status, job number, job description and wild card search facilities along with powerful browse capabilities ensuring jobs can easily be located by users.
- Multiple supplier (sub-jobs) assists with complex multi stage orders, a unique and very powerful facility used when jobs require more than one supplier.
- Customer 'special instructions' can be imported from the customer database, e.g. 'Friday deliveries must be before 1300 hrs', 'Tail Lift required' etc. No re-key is required thus saving time and ensuring consistency.
- Supplier selection based upon product code/type, allows the user to either manually choose suppliers or let Optima2 find which suppliers can produce the product.
- Enquiries may be emailed, faxed, or printed; the system will control fax/email sending automatically and will retry without intervention, ensuring ease and operational efficiency.
- Numbered jobs that are repeated will automatically update the start number of the new job following on from the final number of the previous job.
- Optima2 automatically caters for 'overs' and 'unders' if required and will automatically recalculate the costs and selling prices appropriately along with adjusting the 'numbering' as stored on they job if the job is numbered.

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## **'Job' related Costs and Charges**

- Enquiry supplier cost entry is versatile and fast to use; offering the user price comparison at a glance; users can insert as many additional costs as required; Optima2 will also automatically cater for run on costs.
- Selling prices are totally independent of buying prices; which means you can sell however you wish no matter how costs from suppliers are applied.
- An extremely versatile extra cost entry system affords ad-hoc purchases from additional suppliers; such costs may be held within the same job; i.e. there is no need to raise a separate purchase order for say an urgent motor cycle delivery; thus keeping all appropriate costs within the job for improved cost analysis and 'Job' margin reporting.

## **Printed emailed and faxed documents**

- Quotations, orders and acknowledgments are output in a professional letter format, with detailed job specifications. Documents may be emailed, faxed or printed.
- Enquiries are both clear and precise and ensure ease of use by the supplier for any job type/specification.
- The box label facility; allows you to brand your box labels; this feature affords automated numbering of boxes e.g. Box 2 of 9, Numbered from 2000 to 3999 etc.
- Proof slips provide clear and precise information for sending with proofs and new designs.
- An address label print facility, saves users time when posting/addressing envelopes and packages and maintains your branding.

## **'Job' control**

- An automatic audit trail tracks specification changes, job status changes and also affords the user the ability to add additional manual entries if required, i.e. Optima2 easily records who did what, when and why.
- Documents and files may be attached to any audit trail entry and a copy of quotations, orders etc. will be stored automatically within the audit trail affording future review as required.
- Delivery schedule facilities allow users to schedule multiple deliveries with ease (no limit).
- Delivery chase mechanisms are employed to afford automated supplier deliver chase ensuring jobs are delivered on time to your clients.

## **'Proof' control**

- It is common for print management companies to email proofs using standard email services which often causes email issues and lack of control. Optima2 affords users the powerful facility of emailing proofs from within the job and will automatically keep a copy of the emailed proof within the job data files for later review. Proof being sent to suppliers and customers are both handled in a similar manner.
- Supplier proof chase and prioritisation; assists with scheduling and planning your suppliers work by setting and informing them of your job priorities.
- Control of proof movements by status e.g. 'with supplier', 'with customer', 'complete', return date etc. means that users will know what is the status of individual proofs and when to expect them etc.

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## **Invoicing, Cost Control and Sales staff updates**

- A rapid cost entry/allocation system automatically checks for over charge and duplicate invoices; this cost entry system provides users with ease of entry, part invoice/accrual capabilities and cost control.
- Automated invoicing systems provide: single, batch, consolidated and call-off invoicing methods affording the user rapid, accurate and flexible invoicing.
- An automated update system will inform sales staff of changes made since the last update e.g. 'Job' specification changes, price changes etc. this update information can be emailed or faxed to sales personnel keeping them abreast of all significant activity automatically at the end of each day or manually by the user at any time.
- There is no need to change your accounting system when installing Optima2, our accounts exportation facility will export costs and invoice values for importation into your chosen accounting package.

## **Database, browse and reporting facilities**

- Sybase Advantage Database Server (ADS) is supplied and used by Optima2 to provide rapid data retrieval along with standard SQL reporting facilities via third party report writers e.g. Crystal Reports/R+R report writer etc.
- A built in CRM scheduler/diary/memo/task system affords planning of holidays, meetings, sales calls etc. users can add reminders that will prompt at a given date/time and each 'communication'/task may have files of any nature attached for future review along with additional notes. The CRM scheduler may be used in conjunction with a job or outside of the job for general CRM and sales purposes.
- Especially developed Optima2 'browse' facilities are used throughout and afford lists/grids to be organised by the user; e.g. the 'job browse' may be organised to group jobs by customer, job status, proof status, enquiry date etc. providing an easy to use graphical interface; browse lists may also be printed if required.
- A variety of reports are supplied with Optima2 at no additional cost, affording printed reports and/or exportation of data for use with other Windows programs, reports may be compiled or modified to suit using an appropriate report writer either by us or your IT staff.
- Customer and contact defaults are stored within the database to assure minimal data entry, maximising speed, accuracy and overall efficiency.
- Customer type/categories may be set to enhance relevant data extraction for mailings and promotions.
- Optima2 may be used in conjunction with the Optima2 stock system, hosted virtual server solutions, and email marketing system. Contact us for more details of these products.