

flex4 ops Integration

Document for:



Flex4 ops Integration

Information

Date of document: 08-04-2021



Background

Optimus and flex4 decided to join forces and offer a fully integrated, cost effective streamlined solution following market lead requirements.

Using the full capabilities of the Optimus dash enquiry system and back office MIS with the flexibility of the ops solution, we can now offer powerful web 2 print and MIS connectivity that meets the demands of the graphic arts industry.

This solution offers the following functionality:

Bi Directional Pricing

The key feature is the real time aspect of this link. The pricing within Optimus is delivered in real time to flex4 ops with response times that can be in fractions of a milli second, which gives you firstly the benefit of consistency; it doesn't matter whether somebody generates a price through the web interface or calls you up to raise an estimate for them internally, you will get exactly the same price with the same specification.

In addition, you are only setting up the pricing elements once in Optimus and this is made visible in flex4 ops. The fact that the customer is also seeing an update to their price in real time as they are changing the specification means that they can compare options very quickly and very simply.

Job Submission

Job submission, which almost says's everything that it does. The key to it is that all of the information that will be made available to flex4 ops everything that we use as an input in terms of files that they have uploaded, text that they have entered, the decisions that they have made about how they want the job to be produced....all of that is fed into Optimus.

This is where Optimus will take over with the dash expression engine allowing the job to be built using the logic based on all of that information. The benefit, of course is that there is a time saving, there is no re- keying of information; but more importantly than the time saving is the fact that therefore there is no loss of information, there is no re-typing, nothing gets left out, everything can present in Optimus exactly as it was entered by the user when using the flex4 ops Web Interface.

In essence this should remove the need for error handling; the intention is that this process will be as clean as it can be. The user will make selections through variable fields, go through a check out process and unbeknown to them what they will have actually done is create a full production job in Optimus with all of the appropriate tasks and requisitions for that job to then be processed.

Optimus Customer Portal

Optimus Customer Portal will provide a simple and easy point of access for the customers to view anything that has happened, is happening, or is planned. A full and comprehensive view of sales, financial or production information including: invoices, jobs in production, jobs finished and delivered, quotations, stock levels and job history will be made available. All information available to the customer is a filtered and controlled view of the information which already resides within the Optimus dash MIS

Stock Call Off

The main thing that the Stock Level Integration will provide is the ability to push the stock level from Optimus into flex4 ops. From a user's perspective from flex4 ops they will be able to manage their own customer held stock at that particular printer. They will be able to see the quantity that is held in stock, make the call off orders from that with immediate adjustment of the stock level available to view.

The mechanics for this process will be driven by the Optimus dash enquiry engine. It will create a model of a job with requisitions for the items being called off, so it's a Sales Order Like situation, but it is not creating a Sales Order, its creating a job but with some of the information that you would have on a Sales Order.

There should be no real difference in process between a call off order and a production order in terms of user experience and what's created at the Optimus end. Again there should be no need to re-key any information; everything should be available from what you selected on the flex4 ops site.

Job Status

As users in Optimus complete tasks within the Optimus job system, that information will be passed back to flex4 ops. flex4 ops users then going on and looking at their orders will be able to see the status of those orders in terms of whether they are in progress, completed and or delivered.

The mapping between flex4 ops and Optimus dash MIS

Basically you will need to have an equivalent product in both systems. If you have a leaflet in flex4 ops with a set of parameters that the user can enter: E.G. Size, number of pages, then you need to have the same products in Optimus with the same parameters.

Managing and maintaining both systems

There will be a little bit of configuration in both systems and you have to set up the products; so the common bit is the information contained within the user interface. You have to set those up in both systems. After that the pricing side of things and the job creation logic is all in Optimus, the logic to produce the job, the images involved, the text involved; that is apart from that one thing with the user inputs, each system looks after its own side of things.

Displaying web orders in Optimus

Menu / dash / setup / optimus

dash

optimus

- Enquiries & Quotations**
 - Contact Manager
 - Customer Service
 - New Quote
 - Quote List
 - Web Site Orders
 - Reports
- Job & Proof Tracking**
 - Job List
 - Proof List
 - Works Order List
 - Reports
 - Cost Analysis Report
- Production Control**
 - Active Work
 - Capacity Planning
 - Task Diary
 - Reports
- Stock & Purchasing**
 - Issues
 - Materials and Outwork
 - Purchase Orders
 - Receipts
 - Requisitions
 - Requisitions to be Ordered
 - Stock Adjustments
 - Reports
 - Batch Printing
- Data Collection**
 - Bad Timesheets
 - Daily Timesheets
 - Remote Data Collection
 - Staff Timesheets
 - Reports
- Despatch**
 - Delivery Notes
 - Delivery Requirements
 - Reports
 - Batch Printing
- Invoicing & Accounts**
 - Chargeable Items
 - Invoicing
 - Purchase Invoice Reconciliation
 - Purchase Order Invoicing
 - Reports
 - Batch Printing
- Analysis**
 - Optimus Lean KPIs
 - Sales Analysis
 - Transaction Analysis
 - Work In Progress
 - Reports
- Configuration**
 - Alerts
 - Company Parameters
 - Cost Centres and Activities
 - Currency
 - Customers
 - Data Collection Layouts
 - Employees
 - Enquiry Configuration
 - Non Productive Time Codes
 - Purchase Order Approval Groups
 - Suppliers
 - User Permissions
 - Validation Codes
 - Reports
- Help**
 - About dash
 - Optimus dash
 - Optimus Helpdesk: 01483 732600
 - Help
 - Optimus Support Website

You have 3 Flex4 job(s) (Value 1002.22) booked in today

Alert information, that can inform users of incoming jobs.

You have 3 Flex4 job(s) (Value 1002.22) booked in today

Job Number	Order Number	Customer	Estimated Value
103188		WEB0002-Optimus web customer	83.47
103189		WEB0002-Optimus web customer	288.75
103190		WEB0002-Optimus web customer	630.00

Job List (Incomplete)

File Edit Search Window ?

Customer Job Type Representative Originator Status Sort

Anthony Leaver Solicitors 3D Alan Coppard Belinda Kowalski Not Started in Production Job Number
The Ardenczke Hotel Badges Ben Tinsley Bindah Sadana Customer
Arena Sports Limited Banner Declan O'Hanlan Debbie Adams Order Number
Asda Ltd Books Jane Granger Emma Grist Job Quantity
Check Up Dental Care Brochures Ian Zaal Complete Title
Cooper and Co Bus Side Lucy Corbett Not Complete Booked In
Costcutler Supermarkets Group Calendars Matt Somers Martin Wilkinson Locked Booked In
Dent Advertising Carton Molly Parker Steve Baggs Delivery Due
Eagle Media House Clothing Paul Durran Website Cancelled Last Transaction
Suspended Sales Analysis

Title:
Order Number:
Booked in:
Delivery:
Sales Analysis:
 Without sales analysis date

Max No: 1000 Descending

Job Number	Status	Status	Customer	Delivery Address	Invoice Address	Order Number	Job Quantity	Potential Value	Title	Booked In	Delivery Due	Priority	Last Transaction	Sales Analysis
103190	Not Started	Not Started	Optimus web customer	1	1	600	630.00	Web Order 234	10:56 07-Apr-2021	10:56 07-Apr-2021	7			
103189	Not Started	Not Started	Optimus web customer	1	1	275	288.75	Web Order 233	09:15 07-Apr-2021	09:15 07-Apr-2021	7			
103188	Not Started	Not Started	Optimus web customer	1	1	250	83.47	Web Order 232	08:57 07-Apr-2021	08:57 07-Apr-2021	7			
103187	Not Started	Not Started	Optimus web customer	1	1	250	83.47	Web Order 232	08:57 07-Apr-2021	08:57 07-Apr-2021	7			
103186	Not Started	Not Started	Optimus web customer	1	1	1000	1050.00	Web Order 231	08:54 07-Apr-2021	08:54 07-Apr-2021	7			
103185	Not Started	Not Started	Optimus web customer	1	1	1000	1050.00	Web Order 231	08:54 07-Apr-2021	08:54 07-Apr-2021	7			
103184	Not Started	Not Started	Optimus web customer	1	1	1000	1050.00	Web Order 231	08:54 07-Apr-2021	08:54 07-Apr-2021	7			
103183	Not Started	Not Started	Optimus web customer	1	1	500	150.00	Web Order 230	08:52 07-Apr-2021	08:52 07-Apr-2021	7			
103182	Not Started	Not Started	Optimus web customer	1	1	500	150.00	Web Order 230	08:50 07-Apr-2021	08:50 07-Apr-2021	7			
103181	Not Started	Not Started	Optimus web customer	1	1	200	210.00	Web Order 229	11:49 06-Apr-2021	11:49 06-Apr-2021	7			
103180	Not Started	Not Started	Optimus web customer	1	1	200	210.00	Web Order 229	11:48 06-Apr-2021	11:48 06-Apr-2021	7			
103179	Not Started	Not Started	Optimus web customer	1	1	100	105.00	Web Order 228	11:46 06-Apr-2021	11:46 06-Apr-2021	7			
103178	Not Started	Not Started	Optimus web customer	1	1	100	105.00	Web Order 228	11:46 06-Apr-2021	11:46 06-Apr-2021	7			
103177	Not Started	Not Started	Optimus web customer	1	1	100	105.00	Web Order 227	10:39 06-Apr-2021	10:39 06-Apr-2021	7			
103176	Not Started	Not Started	Optimus web customer	1	1	2345	628.49	Web Order	14:48 01-Apr-2021	14:48 01-Apr-2021	7			
103175	Not Started	Not Started	Optimus web customer	1	1	2345	628.49	Web Order	14:47 01-Apr-2021	14:47 01-Apr-2021	7			
103174	Not Started	Not Started	Optimus web customer	1	1	2345	628.49	Web Order	14:47 01-Apr-2021	14:47 01-Apr-2021	7			
103173	Not Started	Not Started	Optimus web customer	1	1	99	118.23	Web Order	14:42 01-Apr-2021	14:42 01-Apr-2021	7			
103172	Not Started	Not Started	Optimus web customer	1	1	200	210.00	Web Order	14:41 01-Apr-2021	14:41 01-Apr-2021	7			

Found 487 matching job(s) at 17:03 08-Apr-2021 (0:01)

Job list displaying the web orders coming through to production.

The Optimus Job will have the web order reference as part of its title lines

Job 103190 / Optimus Printing Company Ltd

File View Print Window

Job 103190 (Not Started)

Navigator

- Job 103190_Web Order 234
 - W/O 103190001_A4 Flyer
 - ARTWORK
 - DIGI SHEET
 - TRIM
 - PACKING
 - DESPATCH

Title: Web Order 234
Booked-in: 10:56 07-Apr-2021
Customer: WEB0002
Delivery address: Lisa McCraw, Optimus web customer, 144 Peppercorn close, New Boultham, Lincoln LN2 0EE

Order number:
Delivery due: 10:56 07-Apr-2021
Priority: 7

Quantity ordered: 600
Quantity to deliver:
Quantity delivered:

Job type: WZP
Representative: WEBSITE
Originator: WEBSITE

Estimated value: 630.00
Quoted: 630.00
Potential price: 630.00
Source: Enquiry 497

Optimus Works Order 103190001

Page 1 | Technical Spec | Instructions | Special

Technical Specification

Origination: Artwork Supplied
Size: A4 colour double sided
Material: Lightweight Gloss
Finishing: Trim to size
Packing: Pack suitably
Delivery: Despatch to 1 address

Revised by: setup
Revision date: 10:56 07-Apr-2021

Buttons: Accept, Revert, Delete, Status, Close

Last updated at 17:07 08-Apr-2021
1487 matching job(s) at 17:03 08-Apr-2021 (0:01)

The Full production job including the auto populated technical specification.

T: +44 (0) 1483 740233

E: optimus@optimusmis.com

W: www.optimusmis.com

twitter.com/optimusMIS

Optimus Chargeable Item 4484 X

Created: 10:56 07-Apr-2021 \$ Ready to approve

Job number: 103190 Web Order 234

Works order number:

Quantity: 600 Unit priced

(GBP) Currency Foreign

Price: (None) per

Value: 630.00 (None) Quoted

Estimated: 630.00 (None)

Details **Text**

Customer: WEB0002 Optimus web customer

Invoice address: 1 Lisa McGraw, 144 Peppercorn close, New Boutham, Lincoln, LN2 0EE

Chargeable type: PLANNED Planned

Cost category: PLANNED Planned

S/L analysis: POS Point of Sale

Tax code: I Increased Tax Rate 04/01/11

Product: FLYER Flyer

Invoice Invoice Date Invoice Section

Approver: Approved:

Auto update when booking-in Invoiced externally ?

Note:

Accept Revert Delete More Close

The chargeable items are created for invoicing, unless a payment has been made through a payment gateway, then they will be marked as invoiced externally and automatically approved so they are not sent through to the accounts twice.

Diagram below outlines broadly speaking the current flow and the benefits of using Optimus dash MIS

