



Optimiser Software  
Product Overview

**January 2009**



## Optimiser Software Product Overview

**Optima Warehouse Solutions has a successful track record in supplying warehouse management systems (WMS). Our client base is varied and includes warehouses (own goods and 3PL), transport and logistics companies, manufacturers, packaging and other businesses with storage requirements.**

**From a low cost basic single user stock control module to an advanced supply chain system with the latest barcode scanning or RFID technology, Optima provides a complete solution.**



*"Optimiser is a very reliable software package backed up by outstanding support"*

Mike Peacock

### ***Why choose Optima?***

With so much choice now available in the logistics and supply chain market place attempting to source and understand the best options available can appear to be a minefield.

That's where Optima can come into play, being able to identify your needs and confidently match a credible solution that will bring you value for money, reliability, efficiency, and confidence.

### ***So what can Optima do for me?***

Optima can provide a complete solution or can work together with your existing IT provider to automate your processes. Solutions can range from a single user entry level WMS to hand held barcode scanners/printers, or through to full RF integration, RFID and in-cab tracking technology.

We consult with you every step of the way offering general advice, specific device recommendations or complete warehouse management implementations incorporating SOP, POP, and Accounts.

# Optimiser Software Overview

A growth area and sometimes the least understood is the ability to link new bar-coding hardware to existing business systems. We have the expertise not only to advise but to also produce the software required for smooth uninterrupted implementation.

## What are Optima's Products?

**Optimiser WMS** is our premier WMS product offering you an advanced Windows based software package. With its SQL Server database boasting the fastest retrieval times in the market and its very simple and flexible user interface, you won't find a better WMS package for the price.

Furthermore its modular design means that you can tailor the software to fit your own needs and pay only for those parts you require. This also leaves open an uncomplicated upgrade path for a later time.

Written with the user in mind, Optimiser is quick and easy to use. It has powerful reporting options by integrating it with a standard report writing tool such as Crystal Reports or using the power of Excel spreadsheets to analyse and manipulate the data.

**Optimiser Freedom** is our low cost online version providing a "managed service" low cost rental option with minimal hardware or IT expertise required. Although an Internet based product it offers the full power of multi-functional WMS without the need for specialist hardware and IT expertise. What makes this different from other "Online" offerings is that it is not a Web based application, it's the same tried and tested Windows based software package that has been installed at our clients throughout the UK. In addition it has none of the security risks associated with a Web based service.

Optimiser Freedom is very simple to set up and it has minimal up-front costs. As well as bringing down the cost of ownership the Freedom version means that all data is stored securely off-site which can be a practical alternative for the smaller organisation. In addition its flexibility means that operations can easily be scaled up or down according to needs.

## So What Next?

We have pricing options to suit all sizes of business with single user packages right through to multi-user or multi site. Lease rental options are also available from 2 to 5 years.

We want all of our customers to feel confident that they have made the right decision when buying Optimiser, so we are happy to let you trial the software before you buy it. This will help give you the confidence and reassurance that you have made the right decision.

# Optimiser Software Overview

## Desktop and Product

### Users and Passwords

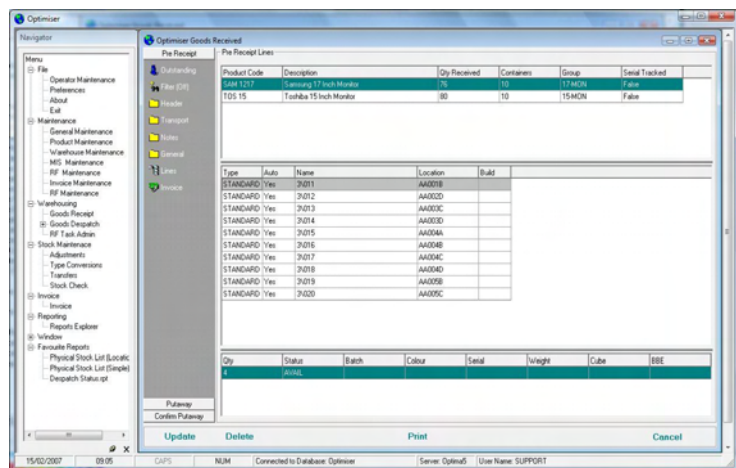
It's easy and simple to set up users and define their responsibilities and access levels. You can switch on or off what they can do or see.

Optimiser has a full audit log so you can see who has done what, when and where. The password will track the user so it doesn't matter on which PC you log in, Optimiser WMS will know your settings and preferences.

### The Desktop

The desktop has a familiar Windows look and feel to it, so moving around is straight forward and simple.

We have kept the work space clutter and icon free giving you more room to work with. You can open multiple windows allowing true multi-tasking



### Product

**Product definition** is the cornerstone of any warehouse management system. All products are assigned against an individual customer code enabling lightning fast product lookups. The product code is 20 alpha numeric characters long and has both a short and long description text box.

You can also specify a picking rule and a put away rule hierarchy, so again making the software help in deciding locations and order of jobs.

Optimiser has the concept of product groups which will help you to group stock by types. This will increase the efficiency of applying rules for products and stock. You can describe the means of how you bring in your stock. So if you want to simply just have pallets you can, or you can create a wide range of product container types like Euro Pallets, Stillages, IBC, Rack, Rails etc.

# Optimiser Software Overview

## Warehouse and Customer

### Warehouse

No two warehouses are the same and therefore Optimiser's location definition has been designed to give complete flexibility.

Operators have the ability to define single locations e.g. FLOOR, LOADING BAY and also the option to define blocks of locations such as RACKING ZONES. Additional flexibility has been built in which allows locations to be defined in a number of different formats.

A warehouse location can be as simple as "The Shed" or defined right down to ZONE, AISLE, COLUMN and ROW. Optima can help and advise you on how best to design and configure the warehouse locations to be the most efficient as possible.

Various location types can be set up to make sure that Optimiser is customised to your way of working e.g. RACKING, BLOCK, BULK, DRIVE IN, COLD STORE etc

To further enhance location usage a status can be used which determine whether you can pick stock, transfer stock or put stock away to a location. This can be used when setting up locations such as PICK FACES or P&D STATIONS.

### Customer (3PL)

Customers within Optimiser are used to define the owner of the stock ensuring that stock cannot be despatched or received against the wrong customer. You can record all customer contact details such as telephone and fax numbers, email addresses and contact details which ensures that all the most relevant information is always at your finger tips.

Additional information can be entered against each customer that will configure Optimiser to suit each individual requirement. This customisation includes receipt, despatch note format and invoice charges offering that personal touch for your customers.

An added benefit for your customers can be the new **X-Change** module that allows automatic report transfer by e-mail, fax or ftp so they can instantly view despatches and receipts etc.

A further step towards integration with your customers is the **Customer Portal**. This option gives your clients a WMS solution of their own helping them to select stock, create orders, book in receipts and produce reports from any PC worldwide. The portal is totally secure and is password protected so they can only see their data.

	From	To	Pad	Combinations
Zone	AA	AA	<input type="checkbox"/>	1
Aisle	A	G	<input checked="" type="checkbox"/>	7
Column	001	020	<input checked="" type="checkbox"/>	20
Row	A	E	<input type="checkbox"/>	5
				Total 700

Container Type	Capacity	Allow over
STANDARD	1	<input checked="" type="checkbox"/>
CARTON	50	<input checked="" type="checkbox"/>

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## Goods Receipt

From Pre-Receipt through to Put-Away and to Confirmation the **goods receipt module** has been engineered with rapid, accurate data entry in mind.

The design of the receipt screens was a key issue as it needed to have the ability to accurately and efficiently record stock receipts. The grid design of the screen makes information clear and easy to understand. The navigation by the operator, is further enhanced by the use of lookup lists and drop down boxes. Not only can information be rapidly entered but accurately as well. Optimiser performs numerous checks to ensure that correct and valid information is being entered.

**“Pre-Receipt”** will let you enter your receipts in advance. You can then view and sort all future receipts which will allow you to plan space management or look to see when you can fulfill orders. You can also use it to plot your busy times helping you to arrange appropriate manpower.

**Automatic stock location** at the put away stage can give great advantages to the warehouse operator. Various rules can be used to determine where in the warehouse stock is located to give the most efficient storage options.

Ensuring that stock can be received in a number of different configurations, gives Optimiser the flexibility to cater for most receipting situations. This adaptability caters for multiple containers which are defined by the operator.

**Confirm Put-Away** is the final stage of receipting stock into the warehouse. You can process your receipts through the three stages. If stock has all ready arrived and been located then you can jump straight to Confirm Put-Away and in one simple process confirm your Goods Receipt.

Optimiser will also track all your charges at the goods inward stage giving you extra flexibility for invoicing. Additional charges can be added for pallet usage, hand balling etc using the Sundry section.

By using integration links, information can be extracted from, or sent to, other computer systems and imported directly into Optimiser without any human intervention giving 100% error free data with 0% effort.



The screenshot displays a grid interface for recording goods receipts. The grid has columns for Item Code, Description, Qty Received, Containers, Group, and Serial Tracked. The data shown includes:

Item Code	Description	Qty Received	Containers	Group	Serial Tracked
TDS 15	Samsung 17 Inch Monitor	76	10	17-MON	False
	Toshiba 15 Inch Monitor	80	10	15-MON	False

Below the main grid, there is a secondary table with columns for Type, Auto, Name, Location, and Build:

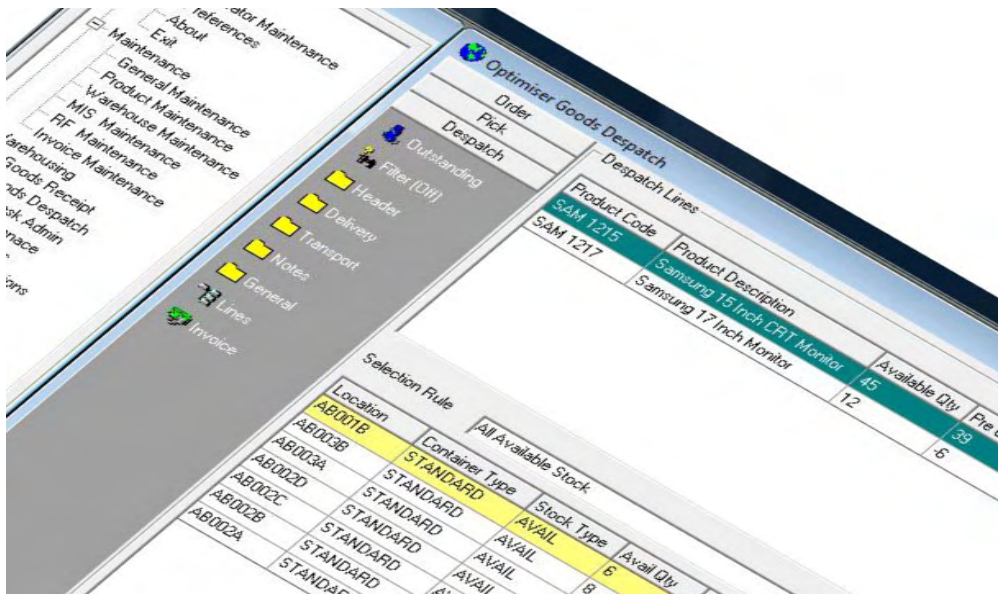
Type	Auto	Name	Location	Build
STANDARD	Yes	3\011	A4001B	
STANDARD	Yes	3\012		
STANDARD	Yes	3\013		
STANDARD	Yes	3\014		
STANDARD	Yes	3\015		
STANDARD	Yes	3\016		
STANDARD	Yes	3\017		

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## Goods Despatch



Like Goods Receipt you have three options **Order, Pick and Despatch** and these allow a number of different methods of removing stock from the warehouse.

You can enter all your orders in the "Order" section and like all the other sections in Goods Receipt and Despatch; you can view and sort them. This will let you process orders in priority so giving you control and management of your stock.

The **picking of stock** from the warehouse can be fully automated using simple or complex picking rules. Optimiser supports consolidated and wave picking which can result in greatly improved efficiency at the pick face. The alternative is to manually select stock which is straight forward using the multiple grids on screen.

To further enhance the manual picking process a number of features have been built into Optimiser. These include a system for the sorting of stock and stock selection rules. The combination of these features ensures that not only is the correct stock being despatched but the stock is picked in the most efficient way.

Optimiser's **order processing** function can allocate prices to a product, apply discounts, set freight charging levels, and automatically generate invoices.

By using integration links information can be directly extracted from, or sent to other computer systems without any human intervention giving 100% error free data with 0% effort. For more information on integration please see Page 10.

# Optimiser Software Overview

## Reporting

The Optima database is designed so that other software packages can access the information and produce reports.

As part of the standard Optimiser package Optima uses Crystal Report Writer which is a well established reporting tool. A number of standard reports have been created which give all the necessary information from stock reports, history, audit reports, receipt and despatch reports.

Creating new reports or modifying existing templates is a simple drag and drop process and formatting of the report is achieved using standard Windows tool bars and options.

**Physical Stock List (Location Order)**

0001 Optima Computer Supplies

Warehouse	0001	Crive Warehouse				
Location	Product Code & Description	Status	Condition	Containers	Qty	
AA001A	T074 ai Str	IN STOCK	Quality Control	10	100	
AA001A	SAM1 1217 Samsung 17 inch Monitor	ADVISED	Available	1	5	
AA001A	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	4	
AA001C	SAM1 1217 Samsung 17 inch Monitor	ADVISED	Available	1	4	
AA001C	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	5	
AA002A	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	4	
AA002A	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	5	
AA002C	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	5	
AA002A	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	5	
AA002B	ACT08 18 Acer 18 inch Monitor	PENDING	Available	1	5	
AA002B	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Quality Control	1	5	
AA002A	T074 ai Str	IN STOCK	Quality Control	1	150	
AA002A	SAM1 1217 Samsung 17 inch Monitor	IN STOCK	Available	1	5	
AA002A	SAM1 1219 Samsung 19 inch Monitors	ADVISED	Available	1	5	
AA002B	SAM1 1219 Samsung 19 inch Monitors	ADVISED	Available	1	5	
AA002B	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002C	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Quality Control	1	5	
AA002A	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002B	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002C	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002A	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002B	SAM1 1219 Samsung 19 inch Monitors	IN STOCK	Available	1	5	
AA002A	T074 ai Str	MOTION	Quality Control	1	150	
AA002A	SAM1 1215 Samsung 15 inch CRT Monitor	ADVISED	Available	1	5	
AA002B	SAM1 1215 Samsung 15 inch CRT Monitor	ADVISED	Available	1	5	
AA002C	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Quality Control	1	5	
AA002A	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Available	1	5	
AA002B	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Available	1	5	
AA002C	SAM1 1215 Samsung 15 inch CRT Monitor	ADVISED	Available	1	5	
AA002C	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Available	1	5	
AA002A	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Available	1	5	
AA002B	SAM1 1215 Samsung 15 inch CRT Monitor	IN STOCK	Available	1	5	
AA002C	SAM1 1217 Samsung 17 inch Monitor	PENDING	Quality Control	1	2	
AA002C	SAM1 1217 Samsung 17 inch Monitor	PENDING	Available	1	5	
AA002A	SAM1 1217 Samsung 17 inch Monitor	PENDING	Quality Control	1	2	
AA002A	SAM1 1217 Samsung 17 inch Monitor	PENDING	Available	1	4	
AA002A	SAM1 1217 Samsung 17 inch Monitor	PENDING	Quality Control	1	2	

Optima Reporting  
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## Stock Maintenance

**Adjustments, transfers and conversions** are all important functions of a good warehouse management solution. These functions follow the Optima philosophy of being fast, accurate and efficient.

To ensure accurate stock levels adjustments need to be carried out and these are achieved using the **stock maintenance option** within Optimiser. Adjusting stock is a simple process of either negatively or positively adjusting existing stock or entering details which relate to new stock.

The **transfer function** has been engineered with maximum flexibility. Having the ability to do part or full container, customer to customer and bulk location transfers from one function, allows the operator to reduce the amount of effort required to ensure stock accuracy within the warehouse.

If stock changes status i.e. becomes damaged, then Optimiser can simply convert the stock. It is also possible within the same function to alter batch details or container codes. Incorporating a lot of functionality into one option gives the operator the power to perform multiple tasks without having to use numerous different screens.

# Optimiser Software Overview

## Optional Modules

### Barcode Solutions

The Optimiser barcode scanning module creates a paperless warehouse meaning that day to day tasks such as picking stock can be processed quickly and accurately. Optimiser RF Module will link to all modern barcode scanning terminals running Windows CE or Pocket PC.

Optimiser WMS or Freedom generates tasks for all procedures including picking, put-away, receiving, stock checking and transfers. By using wireless barcode scanners you remove the often distracting task of operators reporting back to the office for their next job. By automatically feeding tasks to the operator in the warehouse, and Optimiser being updated as those tasks are completed, making the whole process more efficient and more accurate. The Optimiser RF module will monitor and record the warehouse operator's day to day tasks allowing you to report on all activities including task start and end times, number of tasks completed and tasks outstanding.

Optimiser prints barcode labels for pallets, cartons and locations so that you can produce a label to use with your barcode scanners saving on buying bespoke labels.



### X-Change

X-Change has been developed to enhance the communications between 3PL warehouse operators and their clients. It fully automates the delivery of emails and faxes, thus saving the time spent in these manual processes.

It adds value for their customers as they can be kept instantly up to date on all despatches, receipts, stock figures and movements etc. The reporting can either be process driven or on a scheduled basis (daily, weekly, monthly) and transferred either by e-mail, fax or ftp.

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# Optimiser Software Overview

## Customer Portal

This allows a further step towards integration between 3PL warehouse operators and their clients. This option gives your clients a WMS solution of their own thus allowing them to select stock, create orders, book in receipts and produce reports from any PC worldwide. The portal is totally secure and is password protected so they can only see their own their data, and you have control over which functions they have access to, for example you could limit it to “pre-receipt”, “place orders” etc.

## Optimiser.Net (Web Module)

This allows your customers to securely query any element of the stock process via the Internet using a conventional web browser. Whether it is up to the second stock levels, confirmation that or an order has left the warehouse or a delivery has arrived, the web module can deliver any other information you would like to share.

## Invoicing

Optimiser Invoicing Module will capture all charges generated by day to day activity in your warehouse. So you can feel comfortable knowing that you can generate accurate and comprehensive invoices at a click of a button. Invoices can be created on letter headed paper work or exported to a spread sheet for editing before posting to an accounts package.

## Import/Export

This allows seamless data import and export between Optimiser and other software such as Accounts, MRP, ERP and Sales Order processing. For example the module can generate orders within Optimiser and then update other systems as stock is despatched keeping both software applications in sync.

The module accepts various methods of importing / exporting data, from simple text files, emails, XML, cross platform communication and synchronisation with other SQL based databases. It can access all of Optimiser’s processes including importing of orders, pre-receipts, products, delivery addresses as well as the exporting of receipt and pick confirmations.

## Bill of Material

Ideal for packaging companies and fulfilment houses, this module creates and manages products composed of component parts. A recipe is created instructing the user both the steps needed to build the product and the required number of components to complete the task. The process can also be reversed i.e. the final product can be “deconstructed” and reduced back to its component parts.

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# Optimiser Software Overview

## Summary - Why choose Optima?

With combined experience of nearly 20 years in the warehousing and logistics industry the team at Optima can find a solution to suit your business. Our team will work with you to identify your needs and to match a suitable system - from a single user WMS to a sophisticated multi user warehousing and logistics implementation with RFID and in-cab tracking technology.

Increased accuracy and efficiency can increase customer confidence and result in a speedy return on investment. With the opportunity for a software trial before purchase, efficient software support, and an identifiable upgrade path, Optima can provide a long term solution for your business

- Quick and easy to use for all levels of staff
- Modular design - tailor & pay only for YOUR needs
- Integrates with all major software packages
- Automatic e-mailing of reports to your clients
- Entry level online version available
- Simple bolt on upgrades available
- Option of remote or on site data storage

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